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Online Enrollment Member User Guide

2015

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About this Guide

This guide demonstrates step-by-step procedures to help you enroll in you benefit elections and covers a variety of scenarios, such as new hire enrollment, open enrollment, or due to a life event such as birth, marriage, etc.

The benefit enrollment examples in this document are for typical medical elections. The workflow will vary depending on your employer's rules and benefit offerings.

Some features in this document may not be available to you, based on software settings established for your employer and/or the insurance carrier.

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Getting Started

- Accessing Your Account
  - Logging In - Benefits Administrator Provides Credentials
  - Logging In - Account Creation
  - Resetting Your Password and Accessing Your Username
- Navigating the System
  - Viewing the Home Page
  - Changing Your Password
  - Editing Your Dependents
  - Updating Your Personal Information
  - Logging Out
  - Inactivity Logout Alert

Accessing Your Account

There are two methods for accessing your account:

1. The first method is that your Benefits Administrator will contact you to provide you with your *Username* and initial *Password*.

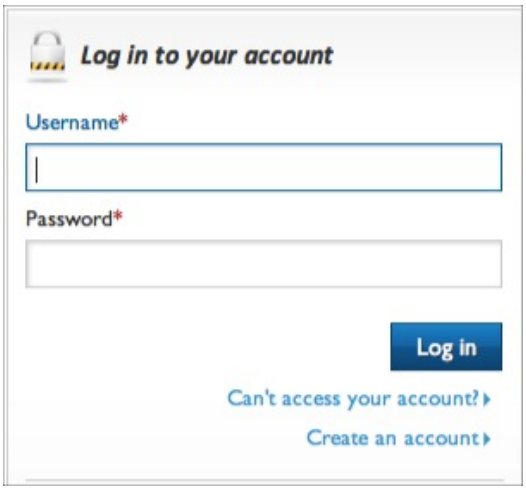
2. The second method is by using the *Account Creation* feature. When you create an account, you will create your own *Username* and *Password* for accessing the system.

Note: You may not have both of these options, depending on preferences set for your employer.

Logging In - Accessing Your Account Using Benefits Administrator Provided Credentials

Use the login credentials provided by your Benefits Administrator. If you have not received this information, please contact your Benefits Administrator.

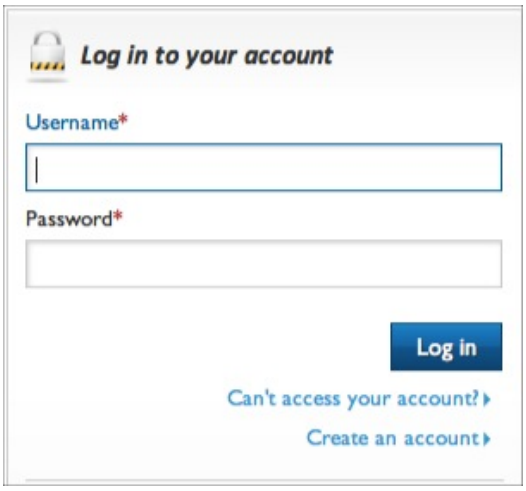
1. Enter your *Username* and *Password*.



2. Select Log in or press Enter on your keyboard. The first time you log into the system, you will have to change your initial password. See the Changing Your Password section below for help.

Logging In - Creating an Account Using the Account Creation Feature

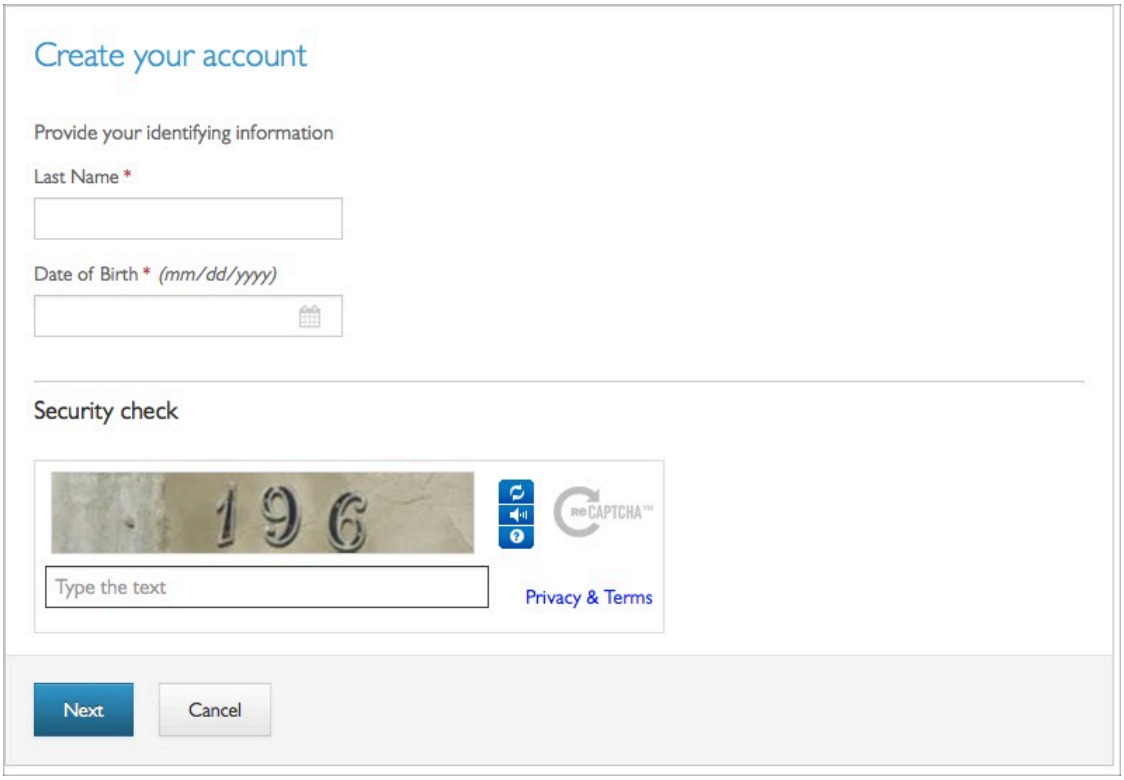
1. Select the *Create an Account* link to begin the account creation process.



2. Enter the following required information into the corresponding fields:

   - Last Name
   - Date of Birth

3. Enter the code shown on the screen in the *Security Check* field. The code will be different each time. If you have difficulty reading the code, select the refresh icon to generate a new one.

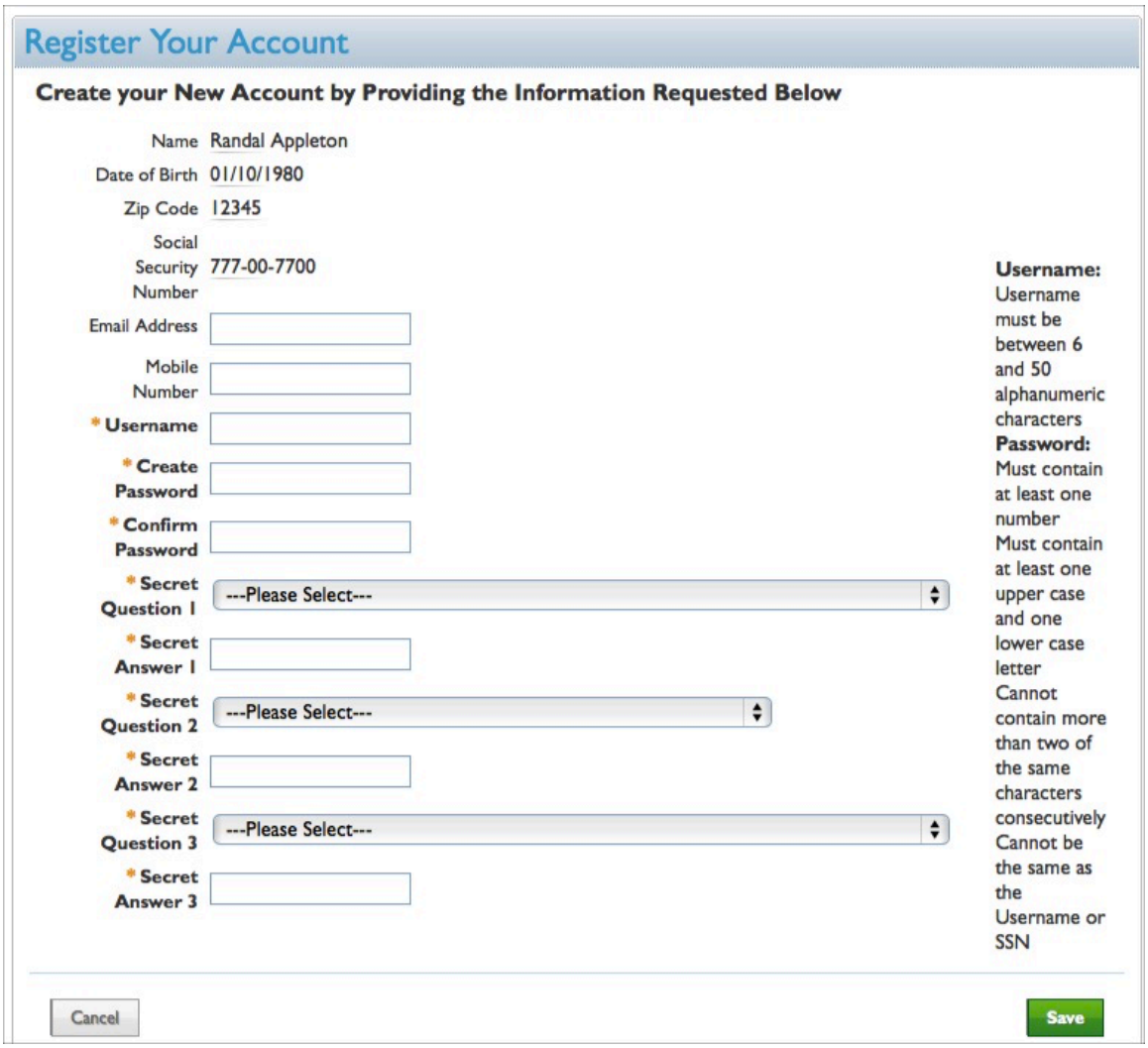


4. Create your *Username* and *Password*. All required fields are indicated by an asterisk. After you enter all required information.

5. (Optional) Enter your email address and phone number.

6. Create a *Secret Question* and answer. You will be asked to provide multiple questions and answers.

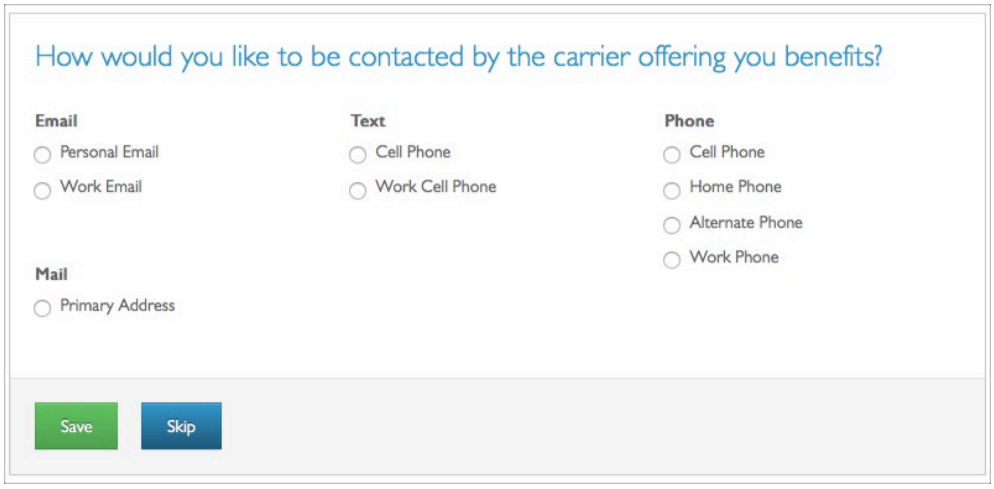
7. Select *Save*.



***Note**: You may be prompted to select a communication preference so that the insurance carrier can contact you regarding benefits. If so, go to **Step 8 a**. You may be prempted to enter a communication preference for system messages, such as ones created by your Benefits Administrator to notify you to complete information, enroll in your Open Enrollment benefits, etc. If so, go to **Step 8 b**. Otherwise, skip to **Step 9** below.*

8. (Optional) Enter your communication preferences:

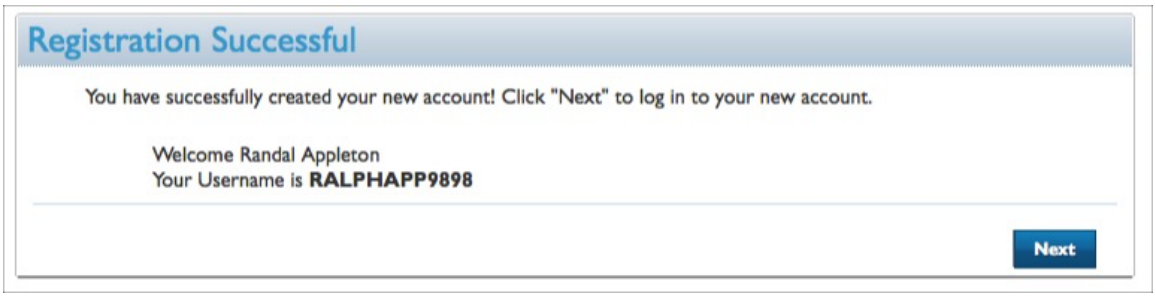
   a. Select the communication preference for the insurance carrier to contact you regarding benefits and select *Save*. You can select *Skip* if you do not want to enter a communication method.



   b. Select the communication preferences for system messages and select *Save*. You can select *Skip* if you do not want to enter a communication preference.

9. Review the confirmation message that informs you that your registration was successful.

10. Select *Next* and you will be logged into the system.



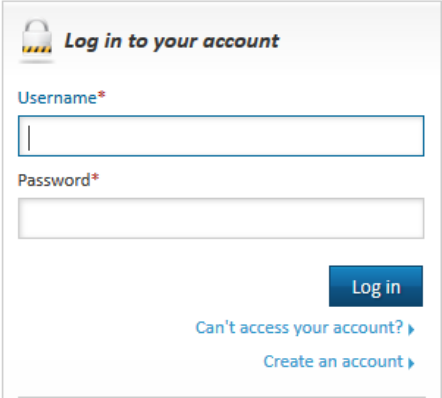
Note: Your employer may not have the *Account Creation* feature enabled. If *Account Creation* is not available, you can select the *Can't access your account* link to retrieve your account information.

Resetting Your Password and Accessing Your Username

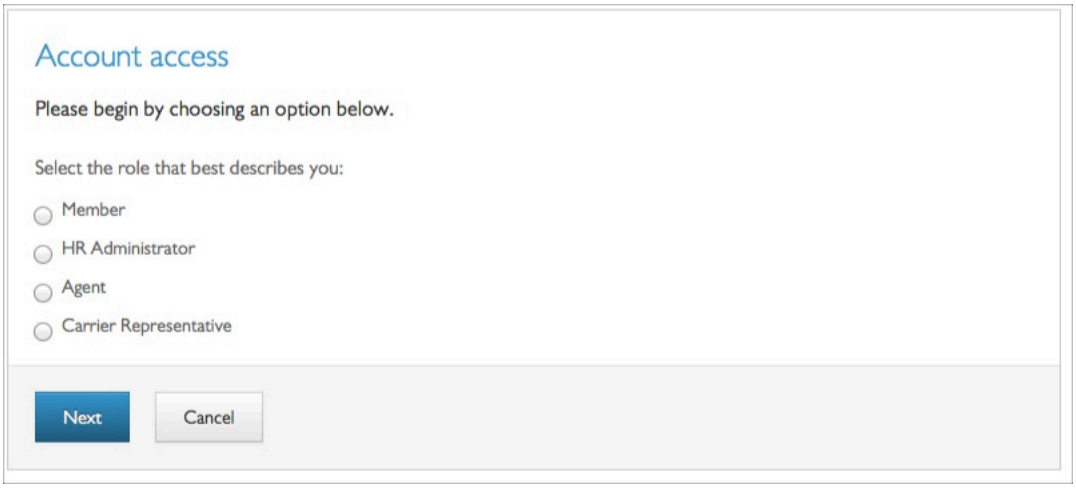
When you access the login page, you must enter your valid *Username* and *Password*. You have a few opportunities to enter your information before you are temporarily locked out of the system. If you successfully enter your username and password after the temporary lockout, you will access the system. If you do enter the correct information after a specified number of attempts, an administrator must reset your password for you.

However, if you forget your account information you don't need to continue to guess what it is. You can retrieve it easily. Perform these steps to retrieve or reset your account information.

1. Select the *Can't access your account* link to begin the account retrieval process.

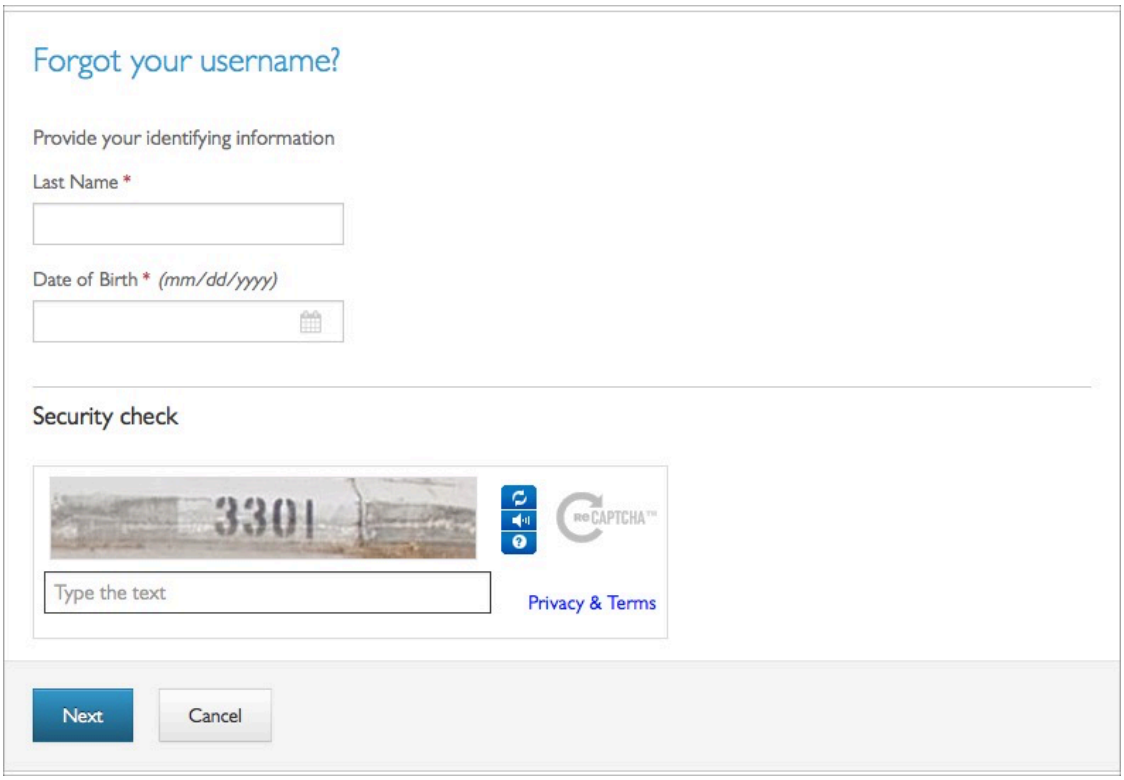


2. Select the *Member* radio button for your user type.



3. Select one of the radio buttons to retrieve your information.
   Note: If you select *I need to create a new account*, please refer to the above procedure – *Logging In - Creating an Account Using the Account Creation Feature*

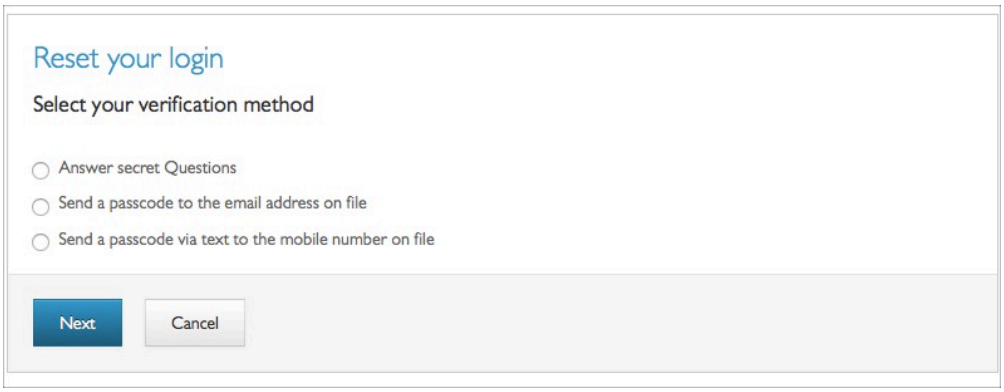
4. Enter the following required information into the corresponding fields:
   - Last Name
   - Date of Birth
5. Enter the code shown on the screen. The code will be different each time. If you have difficulty reading the code, select the refresh icon to generate a new one.



6. (*If applicable*) Select the employer for which you want to retrieve your account information and select *Next*.

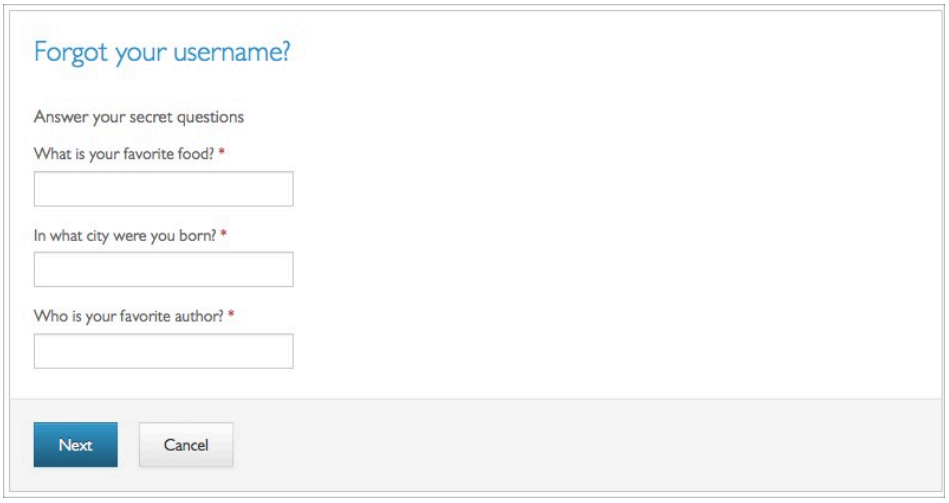
   Note: This step is applicable only if you have information entered into the system for more than one employer. If you work for only one employer, go to **Step 7** below.

7. Determine the verification method for your account.

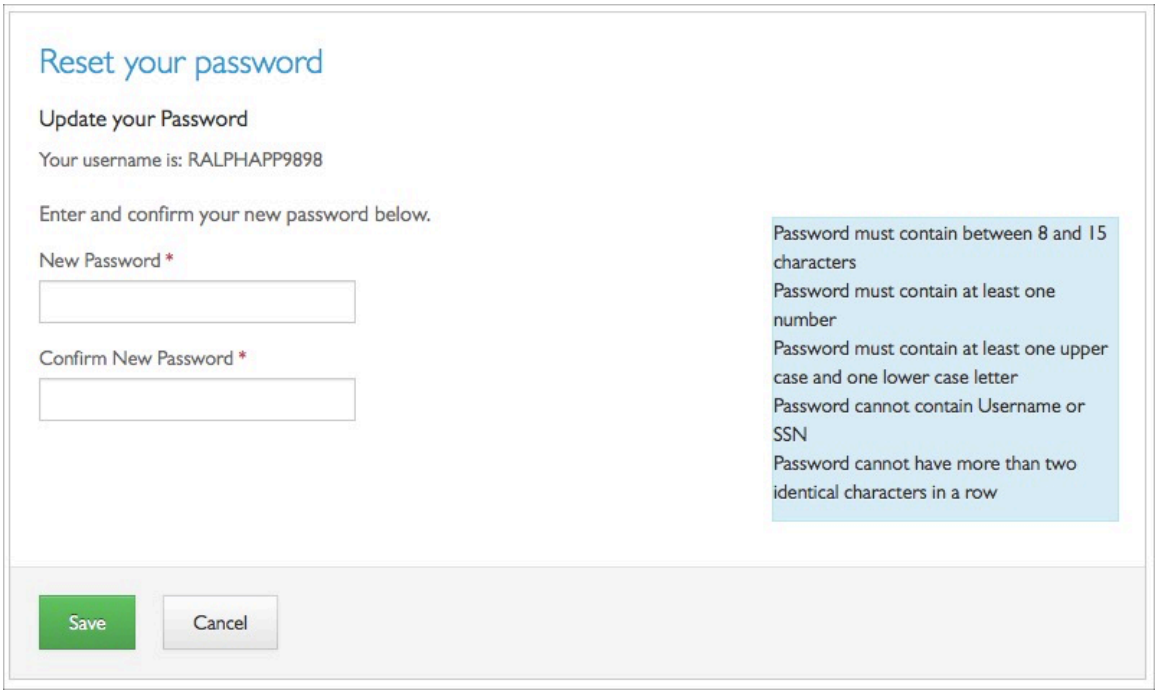


*In this example, we are answering secret questions. If you have not established secret questions or if you prefer to have the passcode sent to you, you will need to check your account and then enter the passcode to continue; you can then go to **Step 9**.*

8. Select the correct answer to each question and select *Next*. If your answer does not match the information in the system, you receive an error message. After a few attempts, you are locked out of the account-reset process, and an administrator must reset your account.



9. Enter your new password and confirm it in the corresponding fields and select *Save*. Your *Username* will remain the same. The criteria for your password are listed on the screen.

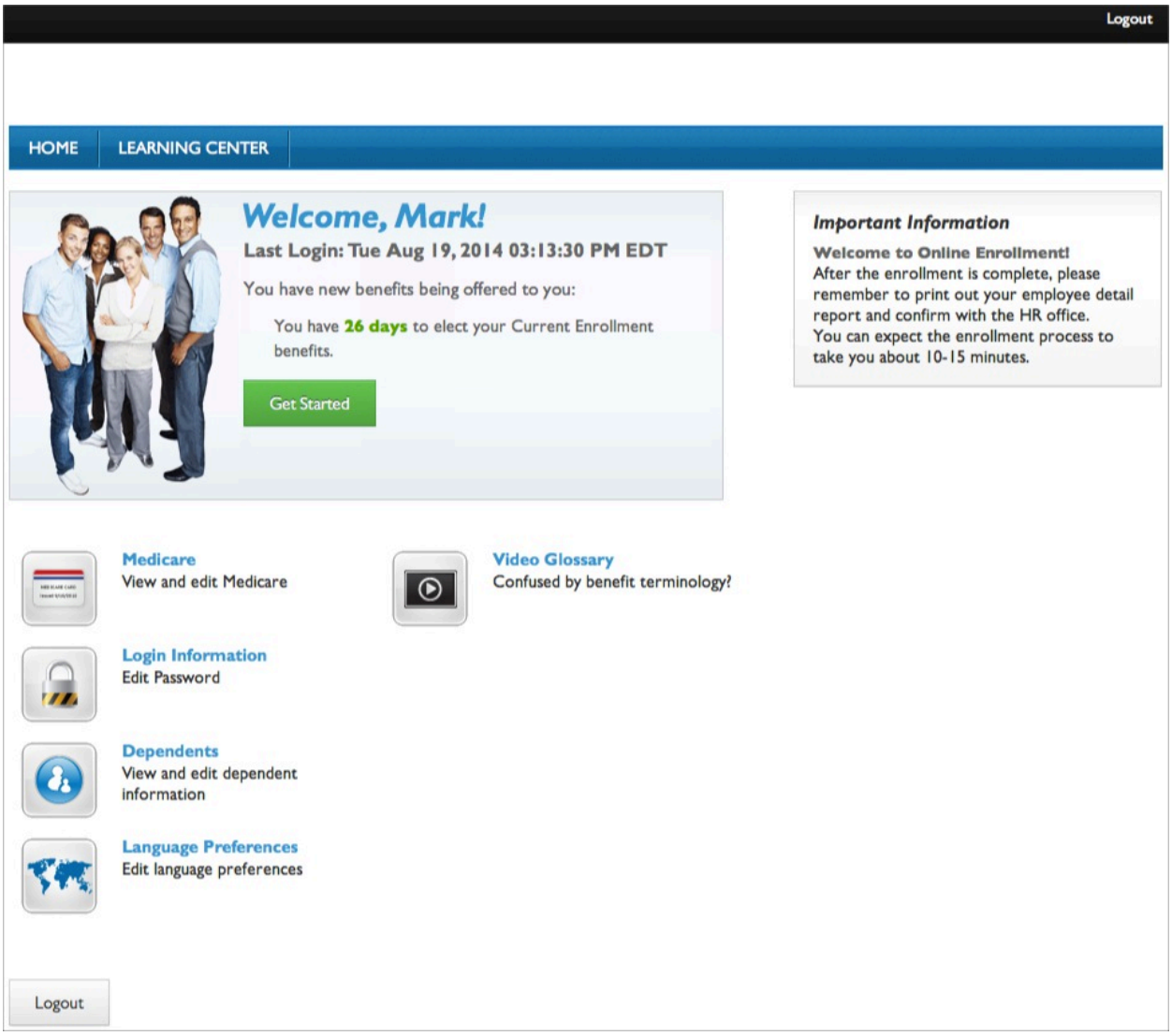


Navigating the System

Once you log into the system, you can easily access your information from the Home page.

Viewing the Home Page

The first time you log in, you will see a welcome message and benefit enrollment information. You can begin enrolling in your benefits by selecting the *Get Started* button. You can also access other information, such as your Language Preferences, Dependents, and your Login Information. Your access to the types of information you see on the Home page depends on preferences established for your company. You can explore the icons on the Home page and make any necessary updates either before or after you enroll in your benefits.



Changing Your Password

Your *Password* is considered personal and confidential. You can update your *Password* anytime from the Home page by selecting the *Login Information* link.

Use the following steps to complete the *Change Your Password* process:

1. Select the *Login Information* button from the Home page.

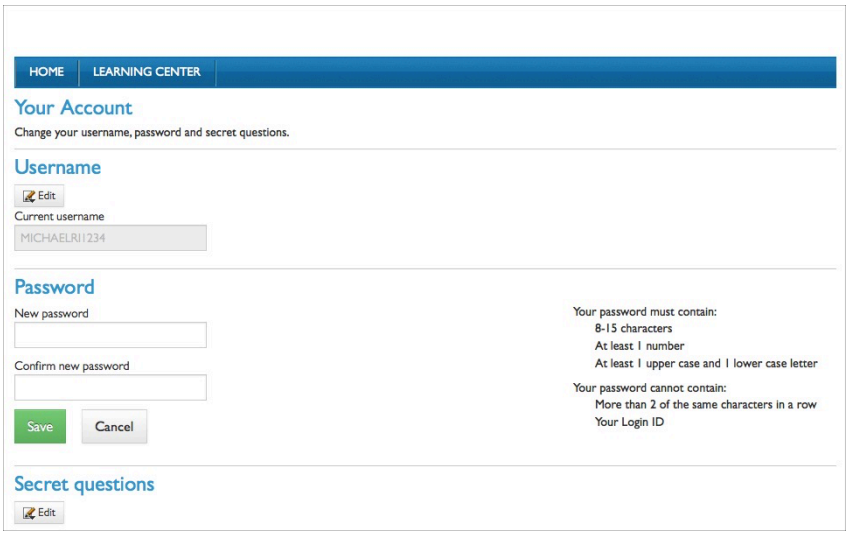
2. Select the *Edit* button under the *Password* heading.

3. Create a new password in the *New Password* field by using the following criteria:

   Your *Password* Must Contain:
   - Between 8 and 15 characters (special character not required, but permitted)
   - At least one capital letter
   - At least one lower case letter
   - At least one number

   Your *Password* Cannot:
   - Be the same as your old Password
   - Have more than two of the same characters in a row

4. Reenter the new password in the *Confirm new password* field.



5. Select *Save*.

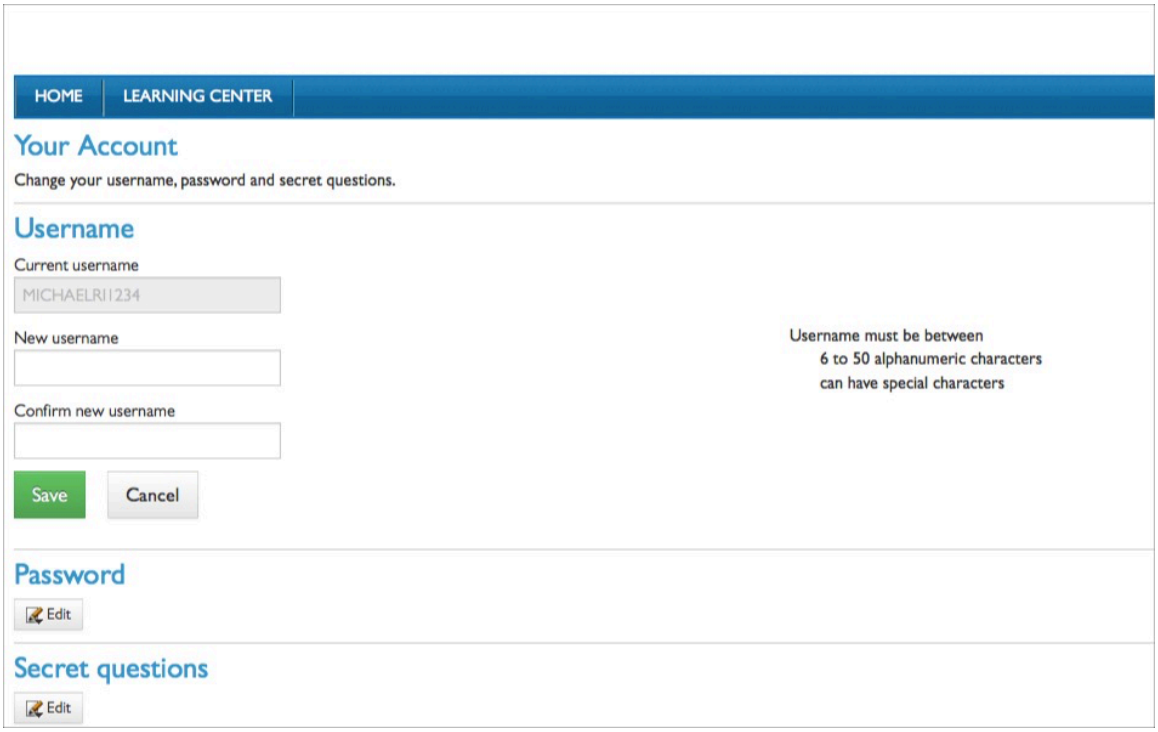
6. Select *Home* in the *Navigation Bar* to be redirected to the Home page.

Changing Your Username

You can update your *Username* anytime from the Home page by selecting the *Login Information* link.

Use the following steps to complete the process:

1. Select the *Login Information* button from the Home page.
2. Select the *Edit* button under the *Username* heading.
3. Create a new username in the *New username* field. You username must be between 6 and 50 characters.
4. Reenter the new username in the *Confirm new username* field.



5. Select *Save*.
6. Select *Home* in the *Navigation Bar* to be redirected to the Home page.

Entering or Updating Your Secret Questions

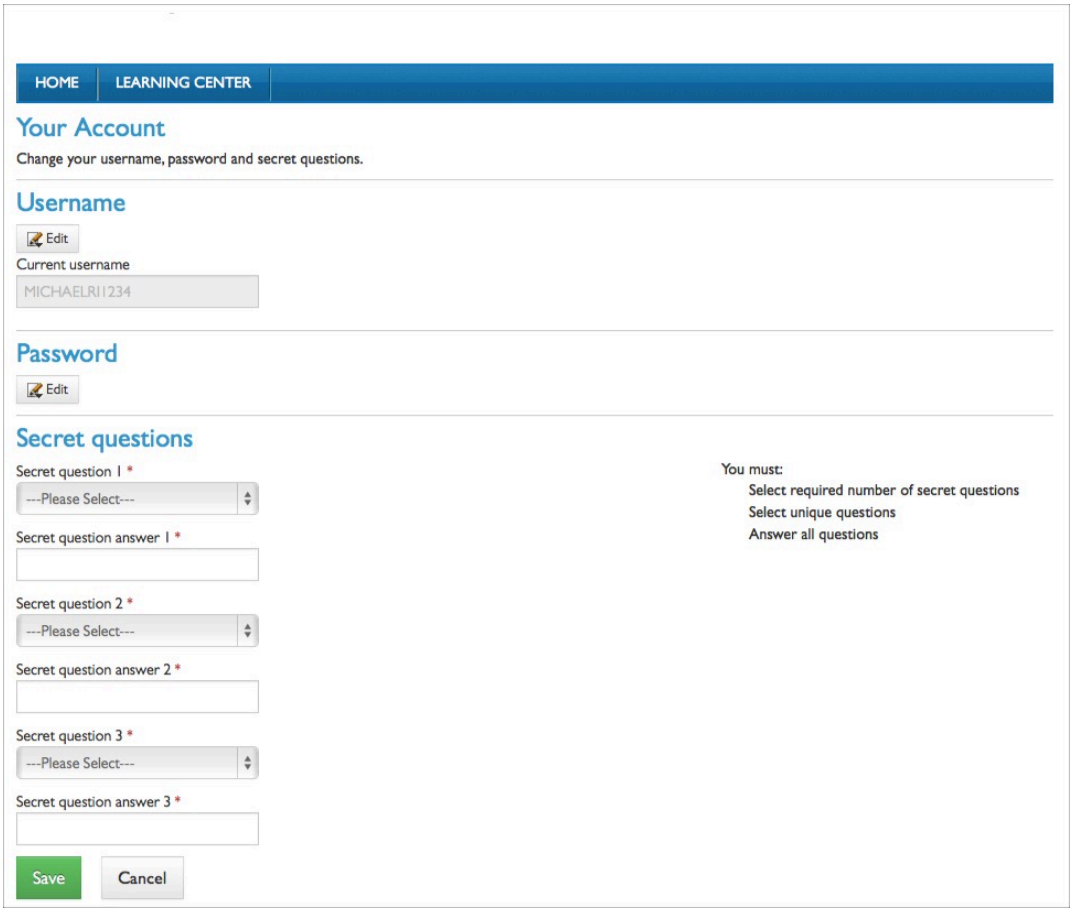
Secret questions provide added security to your account information. There are a specific number of secret questions that you must answer, depending on settings established for your company. You can access secret questions from the *Login Information* section on the Home page.

Use the following steps to complete the process:

1. Select the *Login Information* button from the Home page.

2. Select the *Edit* button under the *Secret questions* heading.

3. Select the secret question types and provide answers for each of the questions.

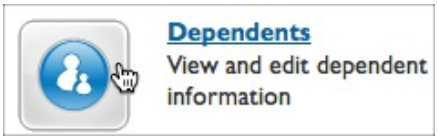


4. Select *Save*.

5. Select *Home* in the *Navigation Bar* to be redirected to the Home page.

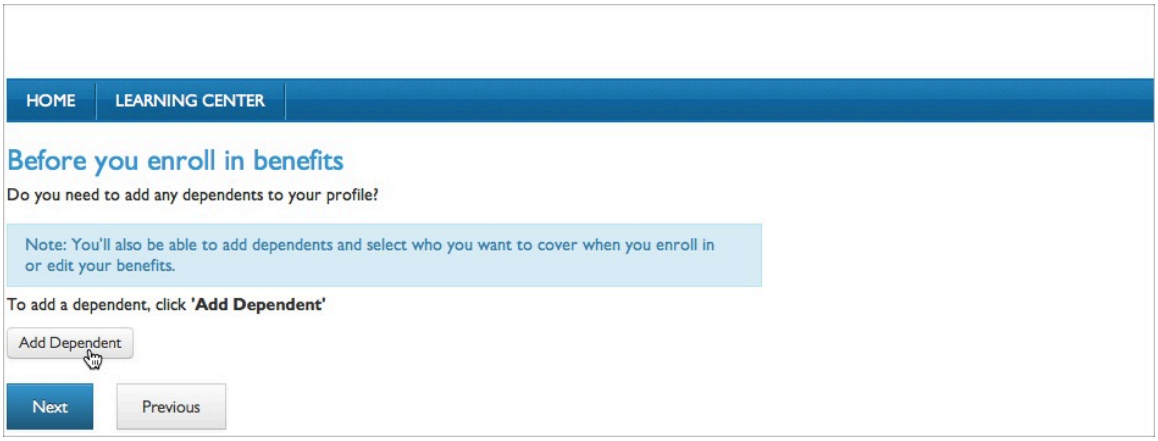
Editing Your Dependents

From the Home page, you can select the *Dependents* icon to access current dependent information or add dependents. You can also add dependents as part of the benefit enrollment flow.

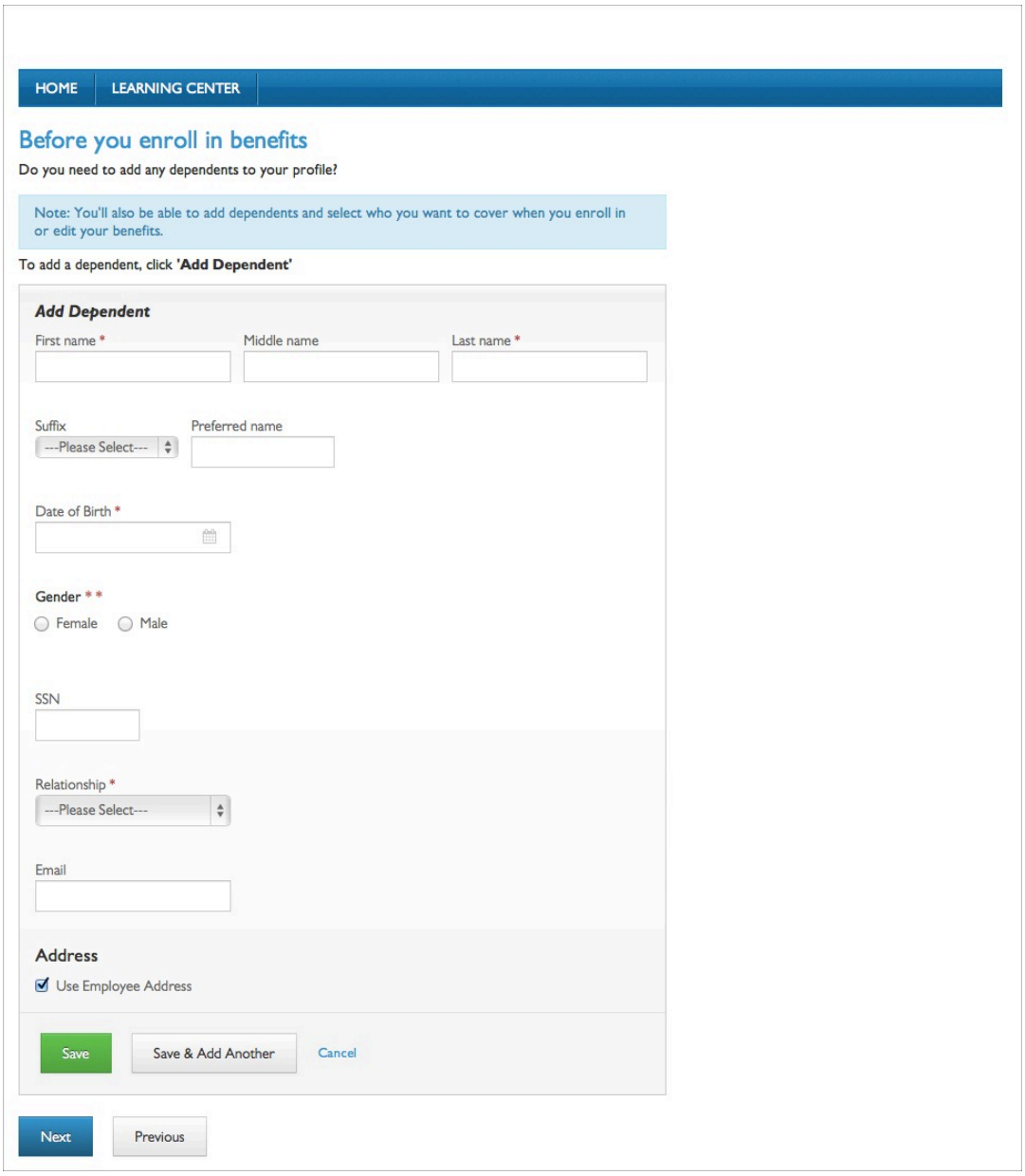


Follow these steps to add a new dependent:

1. Select the *Add Dependent* button.



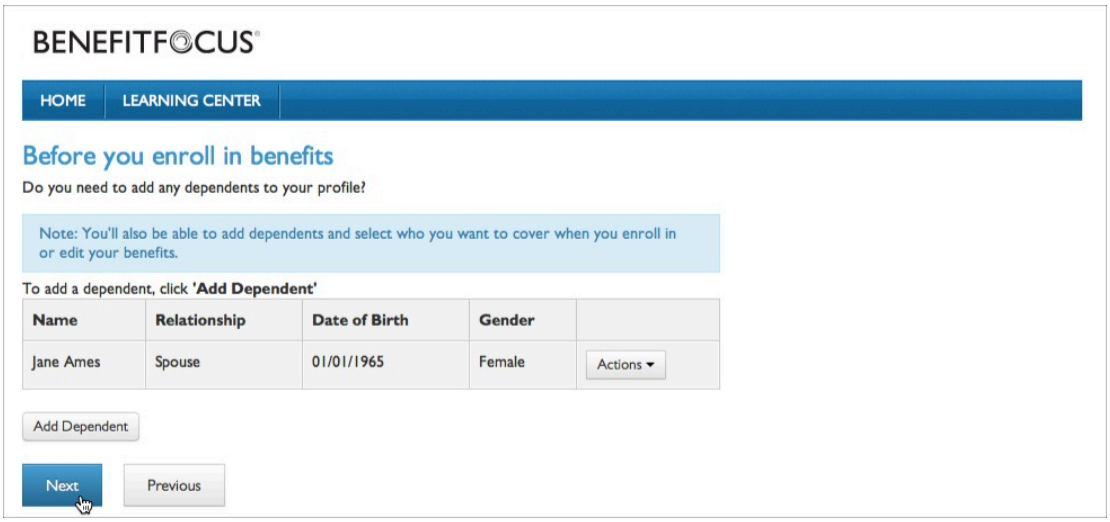
2. Enter the dependent demographic information. Required fields are indicated with an asterisk (*).



3. Select *Save*.

4. Select *Next*.

5. Review the dependent information and then select *Next*.

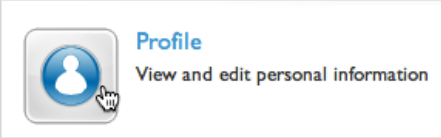


After entering dependent information, you begin the benefit enrollment flow. You can return to the Home page at any time by selecting the *Home* tab in the *Navigation Bar*.

Updating Your Personal Information

You may update your personal information from the Home page screen using the *Profile* tab or icon. The Profile page presents you with the opportunity to enter and review demographic information. Depending on settings established for your employer, you may also be required to enter other information, such as emergency contacts and alternate address information.

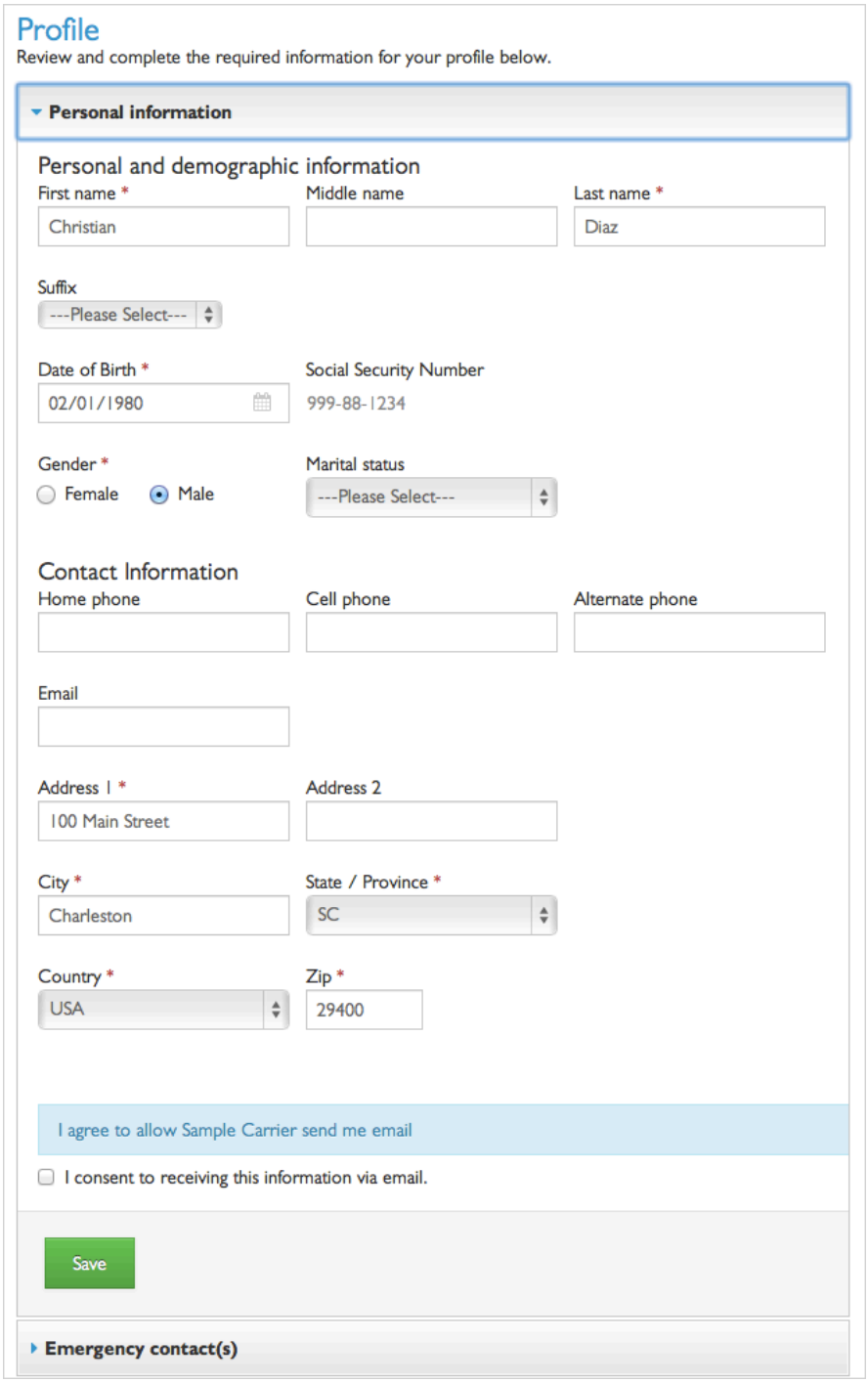
Your *Profile* information may be available from the *Navigation Bar* or via the *Profile* icon. If not, begin enrolling in your benefits and then navigate to the Profile page.



Complete the following steps to make updates within your *Profile* page:

1. Select the *Profile* button.

2. Review and enter information in each section; required fields are indicated with an asterisk.



3. Select *Save* within each section.

4. Select the *Return Home* button to return to the Home page.

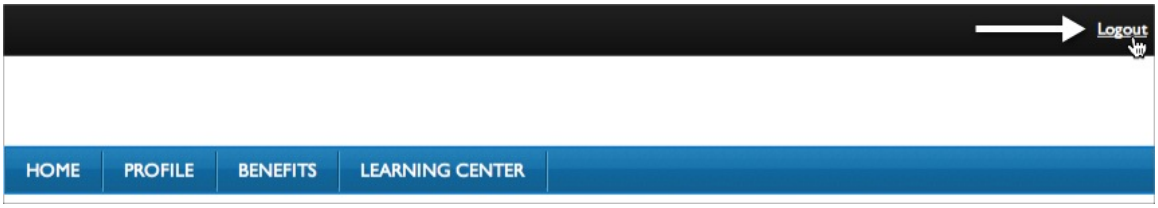
Logging Out

In order to avoid unauthorized access to your information, you must safely end a session by selecting *Logout*. The *Logout* link appears in the upper, right corner of the screen.

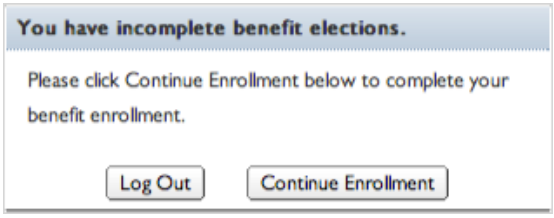
You will be prompted with a *Logout* notification message when you have incomplete benefit elections. The notification will provide options for you to continue and *Save* any changes you made before exiting or logging out of the system.

To log out of the system:

1. Select the *Logout* link at the top of the screen.



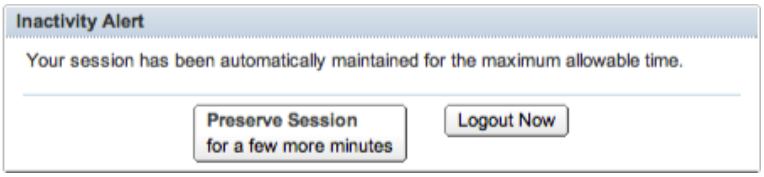
2. Select the *Log Out* option, or select *Continue Enrollment* to return to the current screen to complete and save information before exiting.



Inactivity Logout Alert

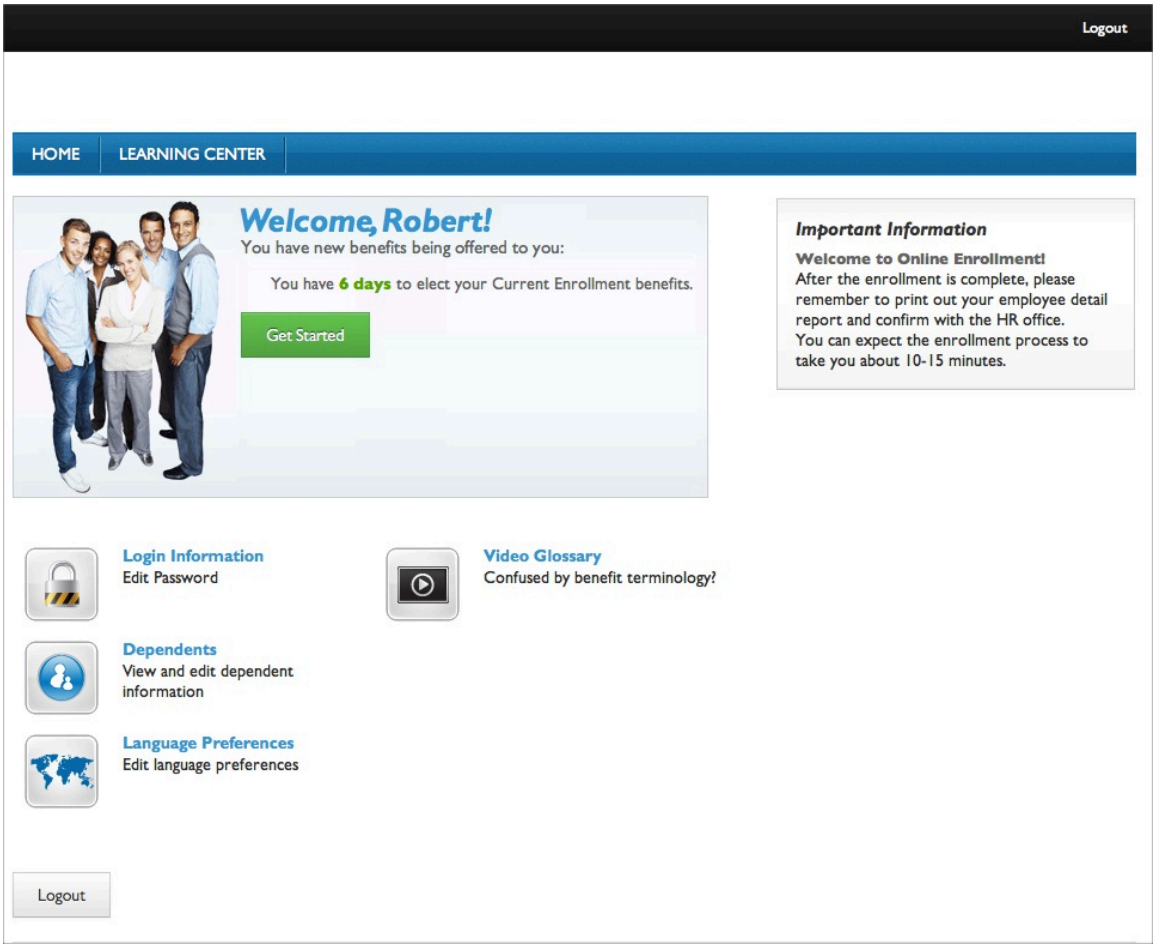
After 15 minutes, the system will generate warning messages that indicate you will be logged out of the system due to inactivity. This warning message will provide you the opportunity to *Preserve a Session* or *Logout.*

Note: Warning Messages are time sensitive. The system automatically logs you out of the system when a selection is not made within the time allowed. You will be required to log in again to resume a session.



Making First-Time Elections

- Benefit Enrollment Overview
- Making Benefit Elections



Benefit Enrollment Overview

The Home page shows you the tasks you need to complete. Select the *Get Started* button to begin. This link is available only the first time you log into the system. After initial enrollment, you are presented with the Home page links to view and edit information.

Here are the basic steps for completing your benefit elections:

1. Navigate from page to page by selecting the *Next* or *Previous* buttons.

2. Select *Cancel* on any screen to return to the Home page.

   Note: If you have not completed and saved your benefit elections, you will receive a warning message, which allows you to return to your benefit elections to complete and save them before leaving the current screen.

3. *Save* your elections on each benefit *Summary* page when you have entered all required information.

   a) Look over your information closely. If you need to change any information, select the *Edit* or *Actions* button next to the corresponding section.

   b) Select *Save* once you have made all necessary changes.

Making Benefit Elections

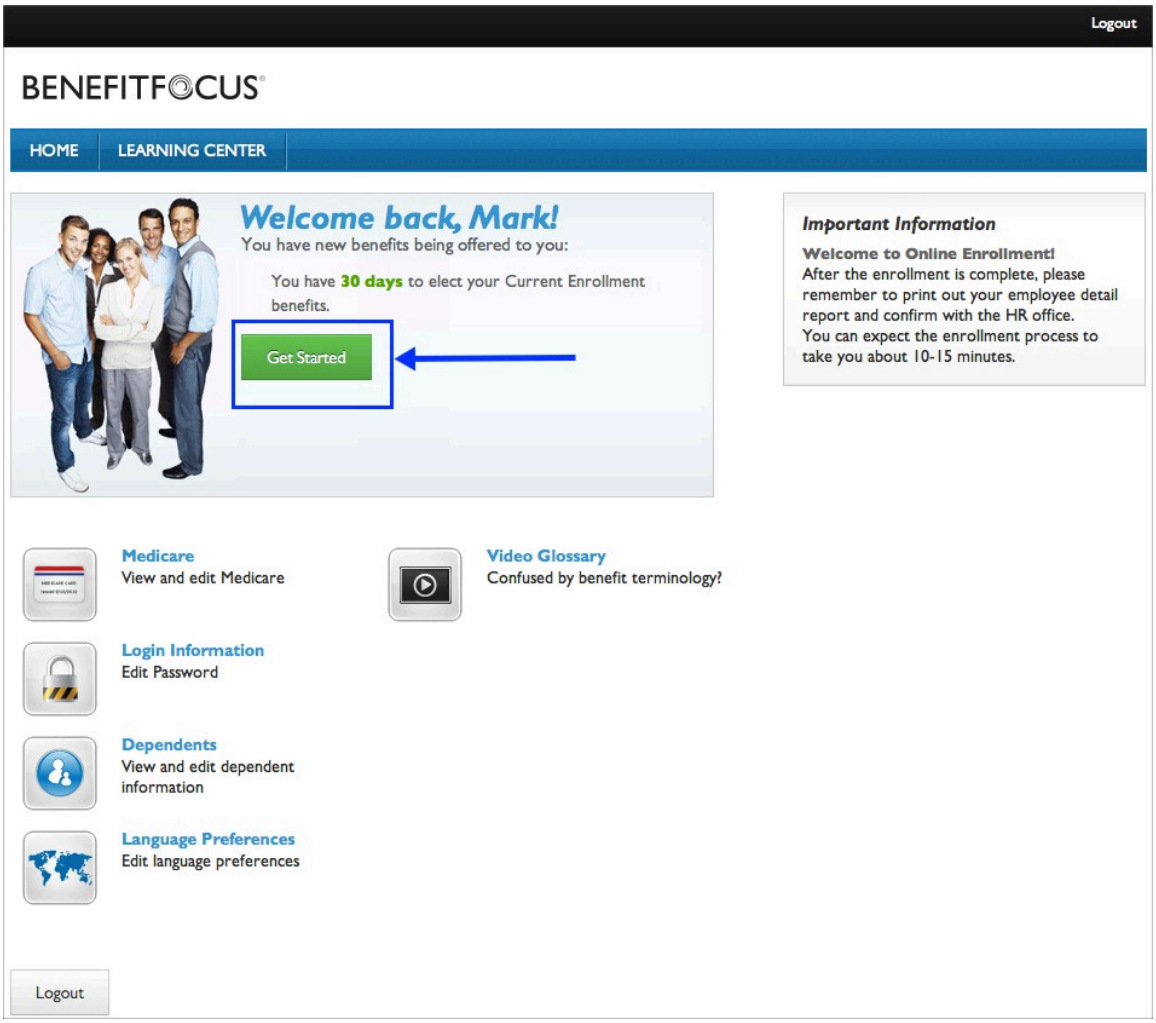
The *Benefits* page will display the benefits that you are eligible for and the timeframe for enrollment. If available, the *Cart Summary* icon will display in the top right corner throughout the enrollment process. The *Cart Summary* feature displays your plan costs and is updated as you make your elections.

Your employer may contribute a fixed amount of money, also called a *defined contribution that* you can apply toward your benefits. If so, you'll see the *Defined Contribution Balance* in the *Cart Summary*. The defined contribution amount works much like a gift card; the cost of your benefits will reduce the defined contribution amount as you make your selections.

The *Plan Shopping App* (PSA) helps you estimate potential out-of-pocket plan costs and display plan differences side-by-side. If the PSA is available for your employer, you access it from the *Plan Selection* page. For additional information, read the *Plan Shopping App* section included in this guide.

Follow these steps to enroll in your benefits:

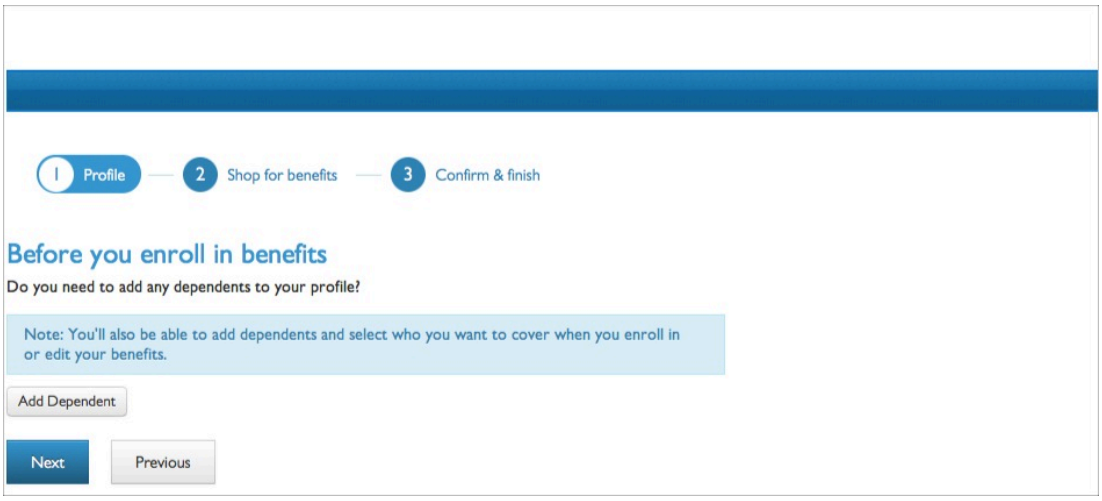
1. Select the *Get Started* button on the Home page.



2. Choose one of the following options:

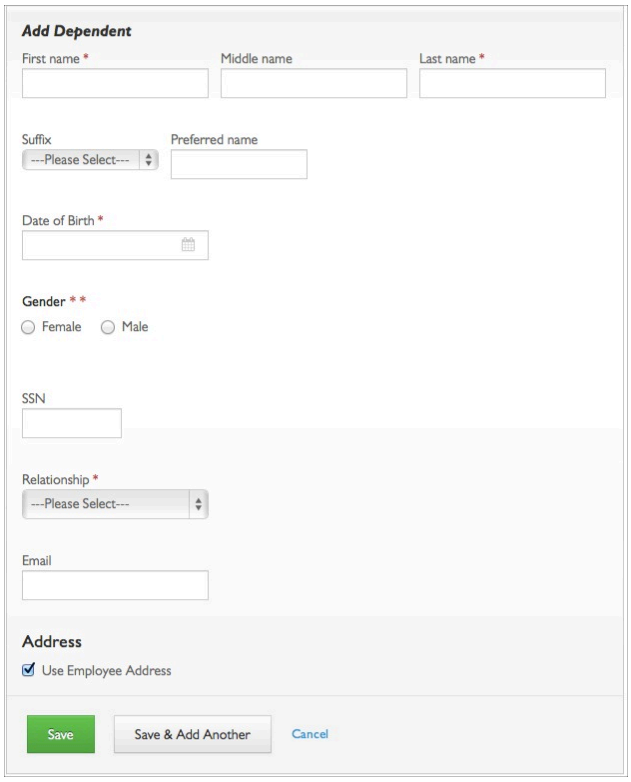
   a. Select the *Add Dependent* button If you need to add dependents to include in your benefit elections; continue with Step 3.

   b. Select *Next* to continue enrolling in benefits without adding dependents. Go to **Step 4**.

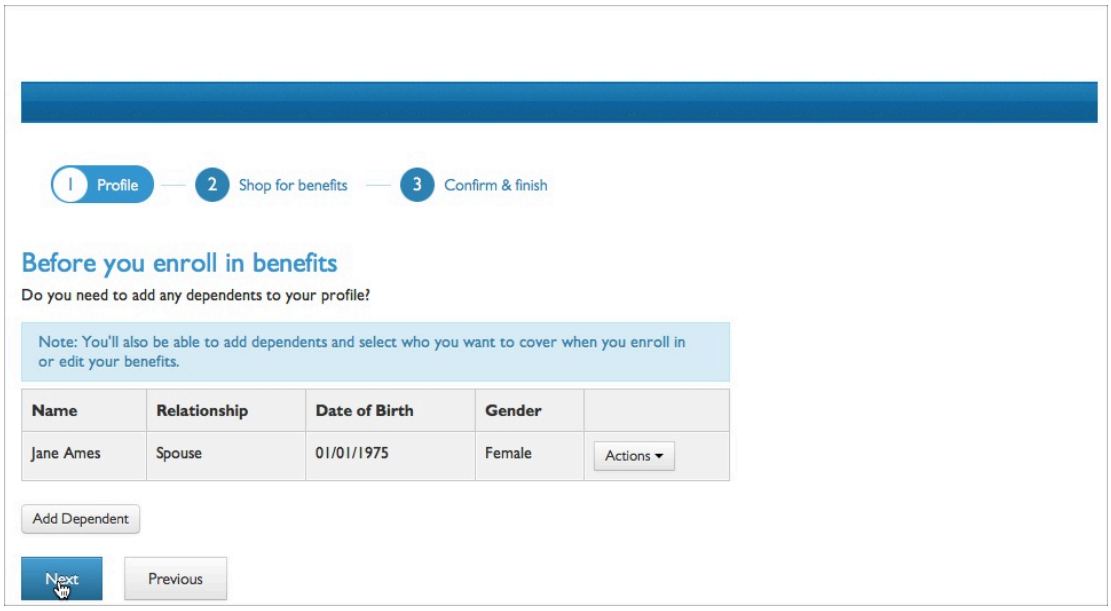


3. Enter dependent demographic information. Required fields are indicated with an asterisk (*).

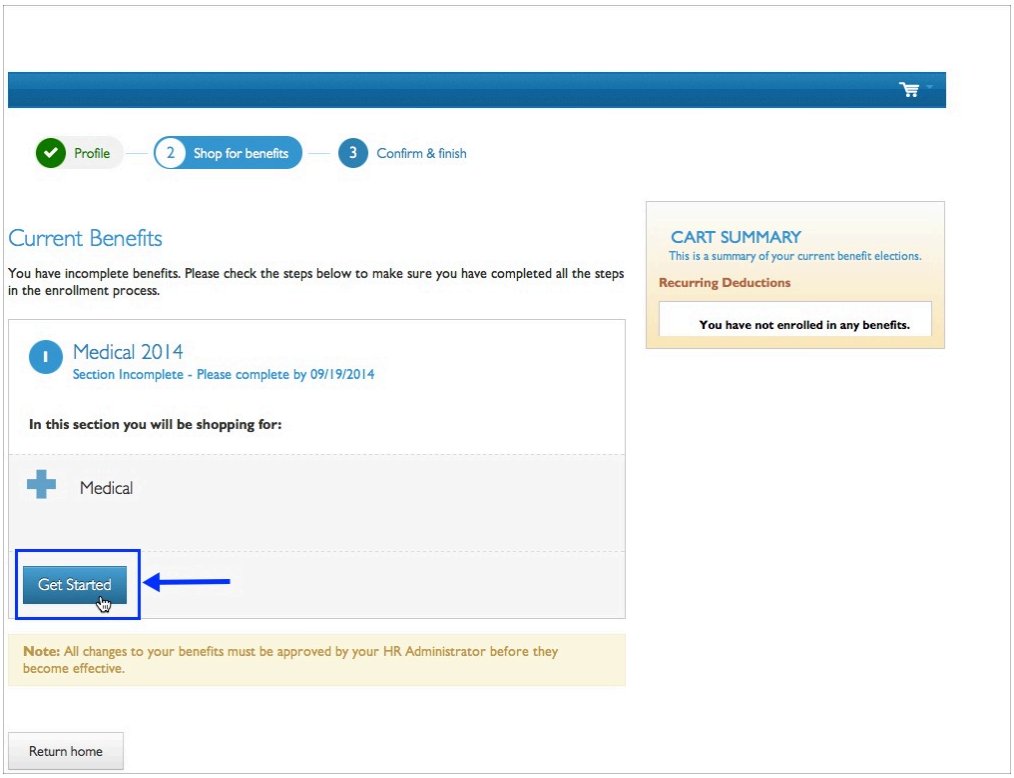
   a. Select Save once you have entered all dependent information.



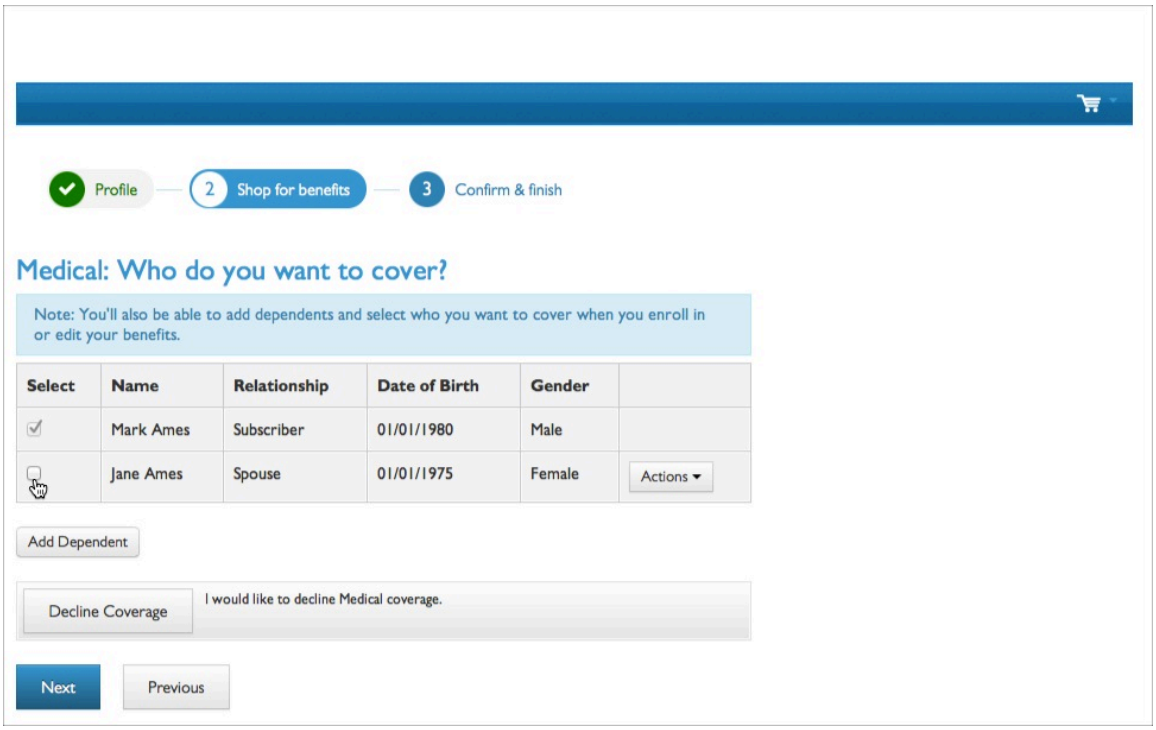
b. Review the information on the screen and select *Next* to begin enrolling in your benefits.



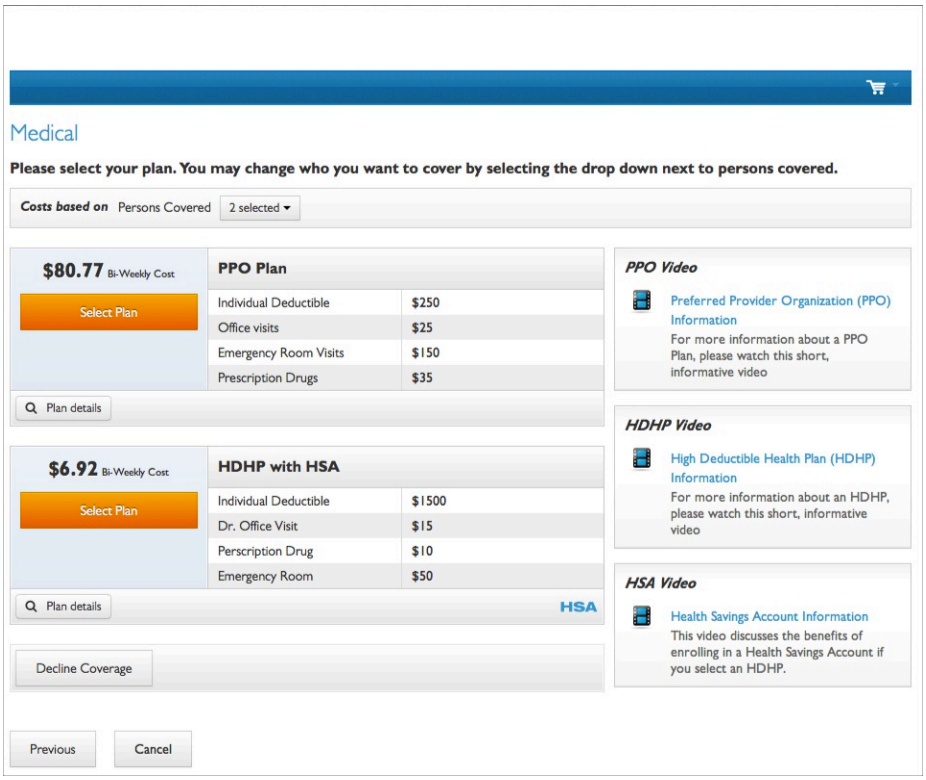
4. Select *Get Started* to begin enrolling in benefits.



5. Determine who will be covered on the plan and select *Next*.



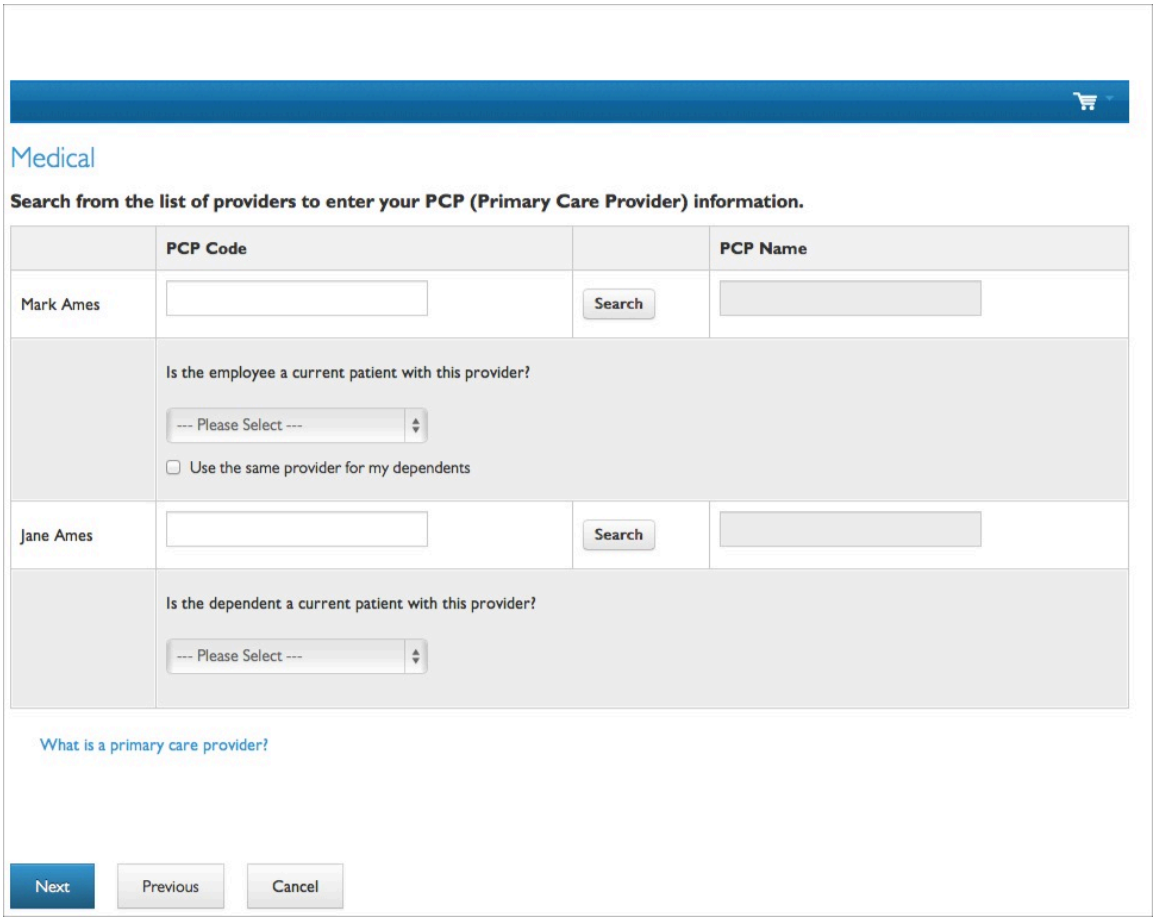
6. Review your benefit plan options. Depending on settings established for your company, you may have decision support tools, such as video, plan detail documentation, etc. to help you choose a benefit plan.



Note: You may also have the option to compare plans through the *Plan Shopping App*, if available for your employer. Please read the *Plan Shopping App* section for more information.

7. Select the *Select Plan* button once you have decided on a benefit plan that best suits your needs.

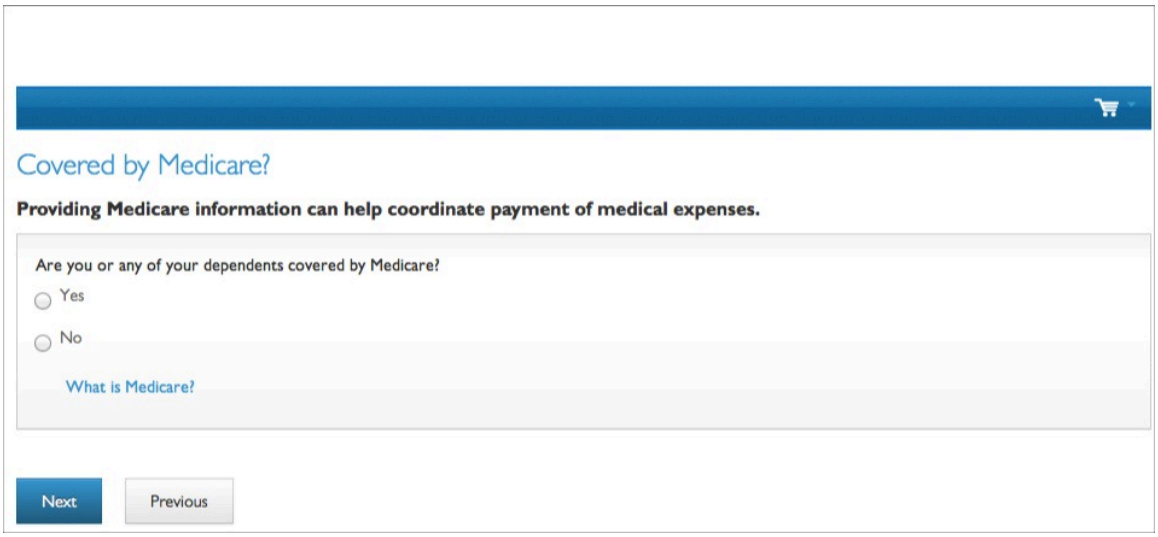
8. (If applicable) Enter Primary Care Provider (PCP) Information and select *Next*.



a. Review the Summary of PCP information.

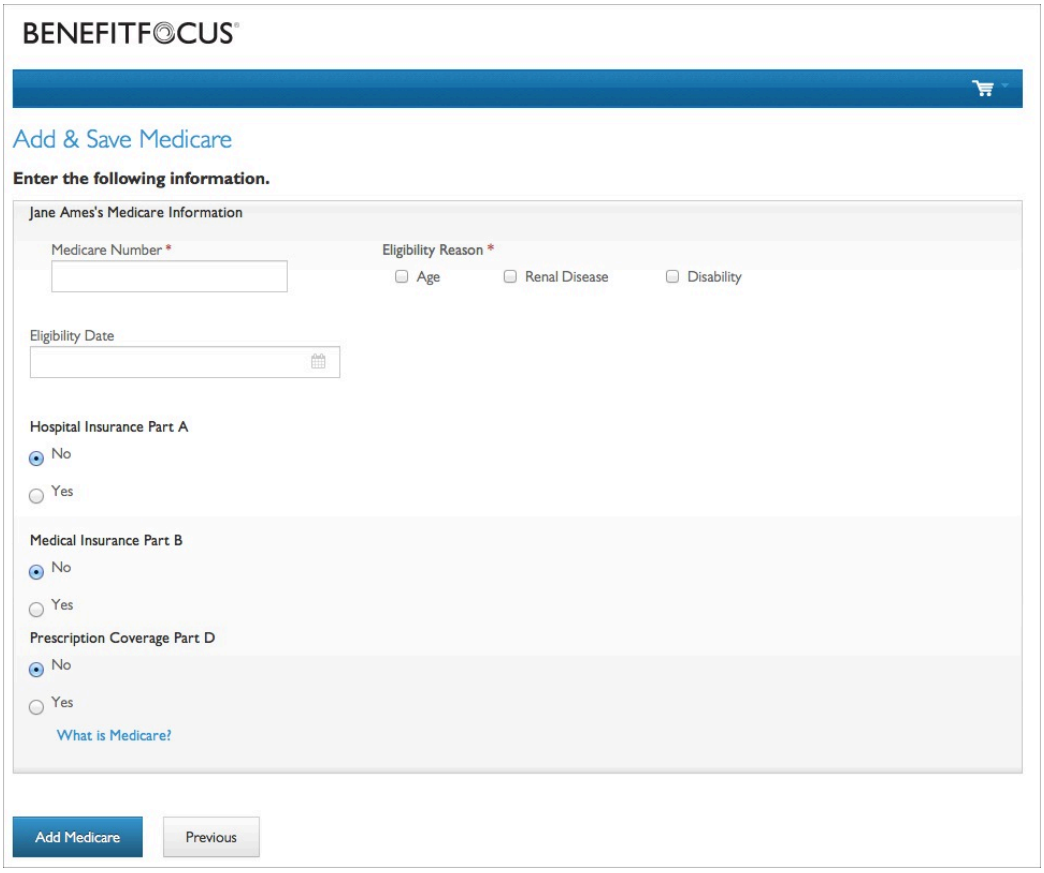
b. Select *Next*.

9. (If applicable) Answer the Medicare question. If you select *Yes*, continue with **Step 9.a.** below. If you select *No*, select *Next* and continue with **Step 10**. *Note*: You cannot enroll in an HSA if you indicate that you are covered by Medicare.

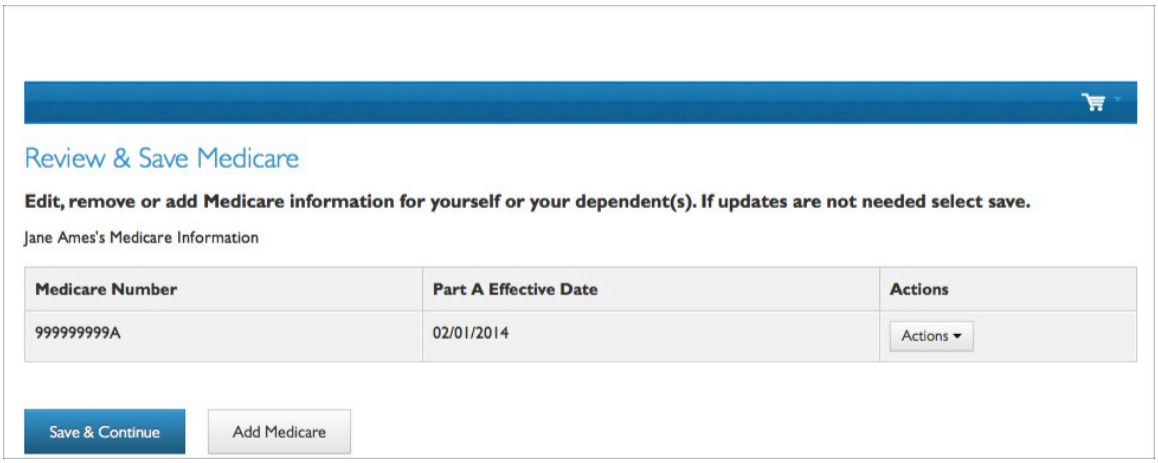


a. Determine who is covered by Medicare and if you have all the required information and select *Next*.

b. Enter required Medicare information and select *Add Medicare*.

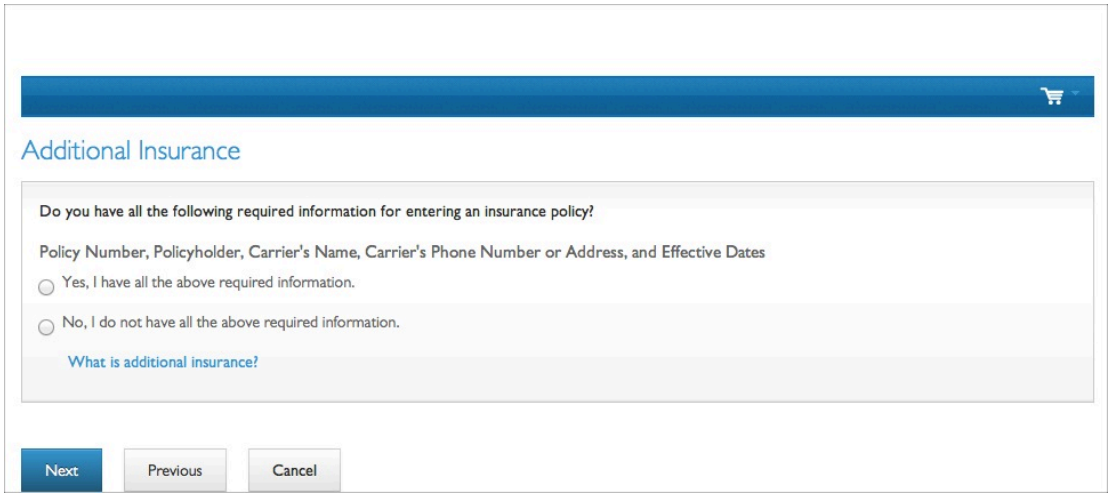


c. Review Medicare information and select *Save & Continue*.

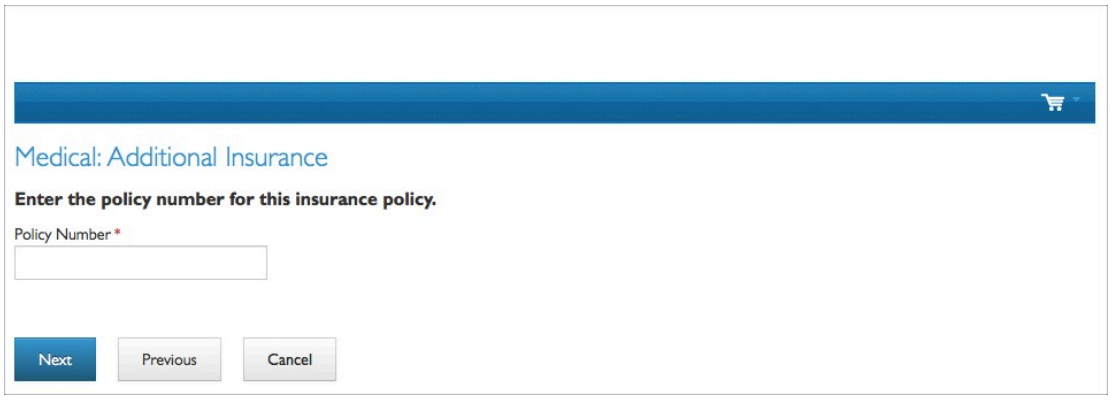


10. (If applicable) Answer the Additional Insurance question. If you select *Yes*, continue with **Step 10.a.** below. If you select *No*, select *Next* and continue with **Step 11**.

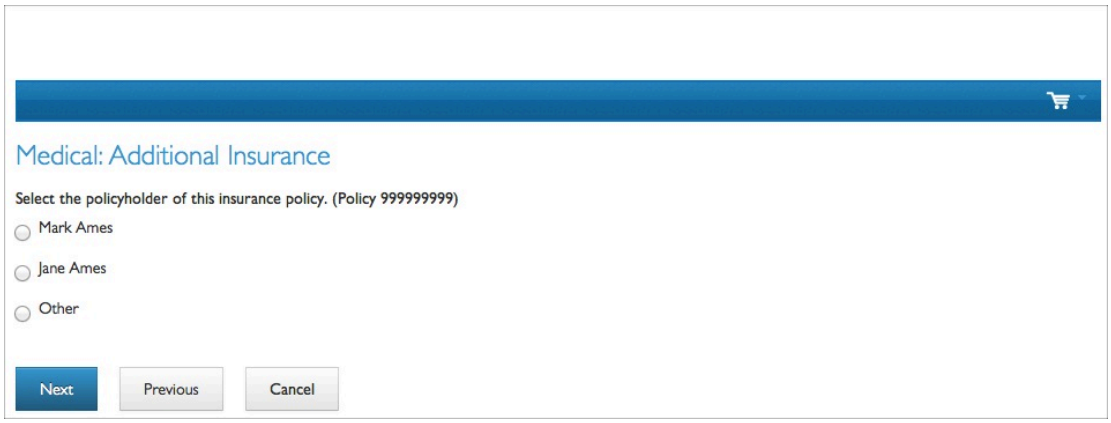
    a. Determine if you have the required information. If yes, continue with **Step b.** Otherwise, go to **Step 11** below.



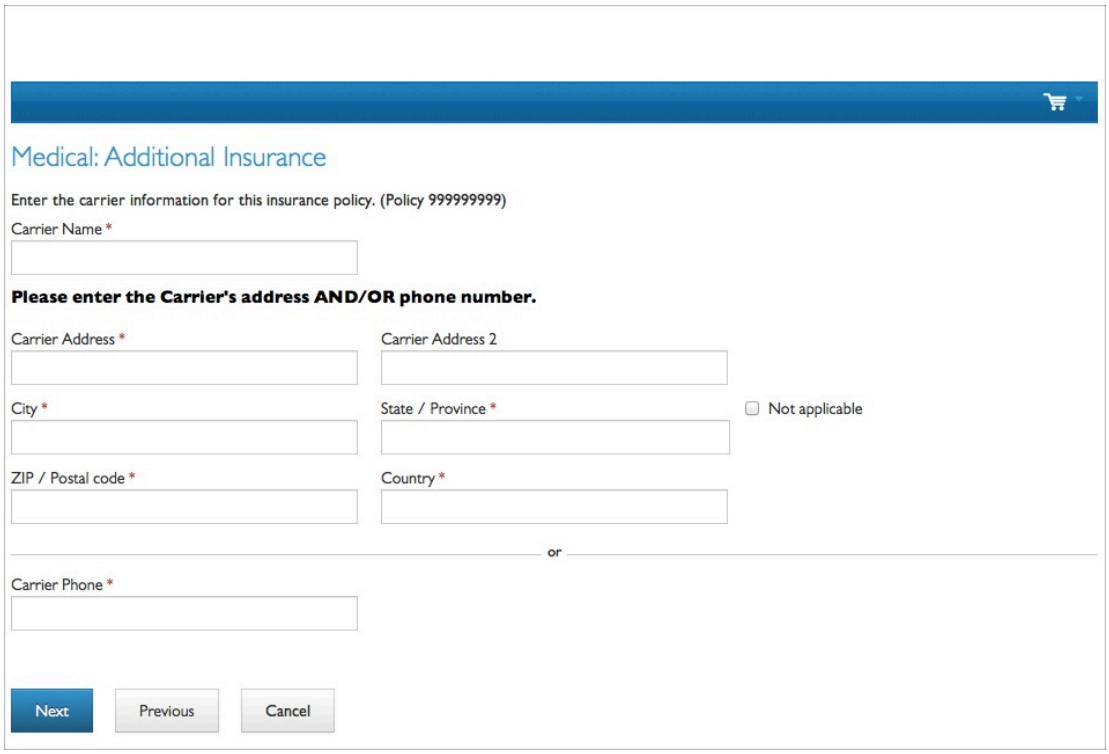
b. Enter the *Policy Number* and select *Next*.



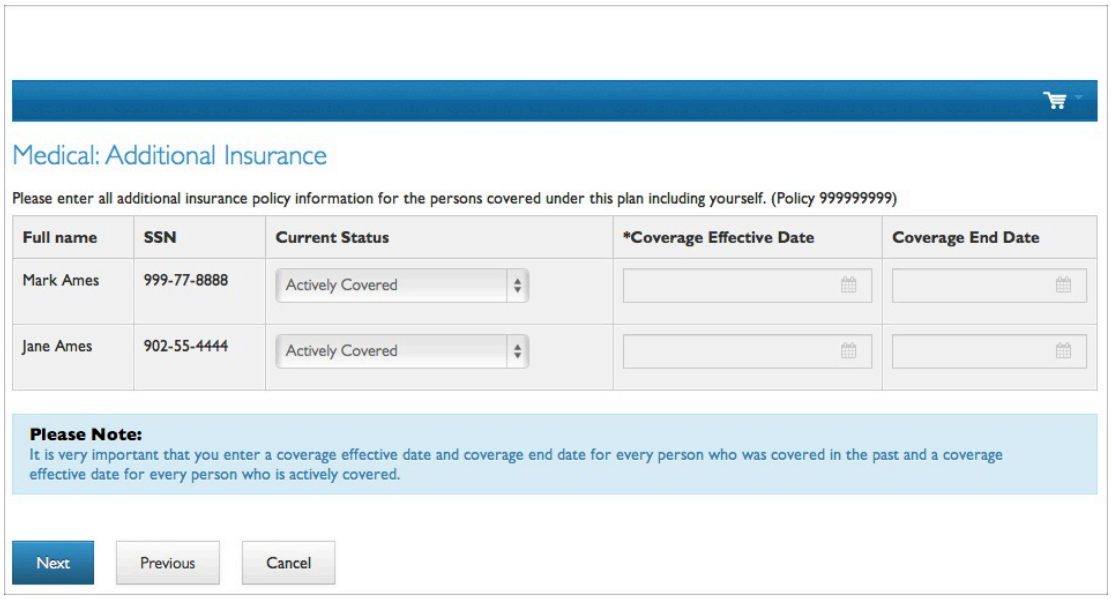
c. Select the policyholder and select *Next*.



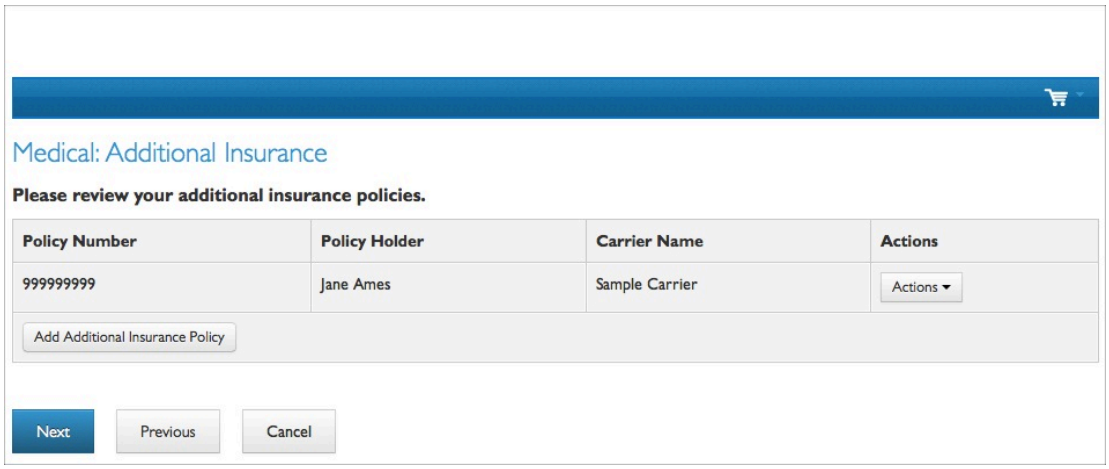
d. Enter the insurance carrier information and select *Next*.



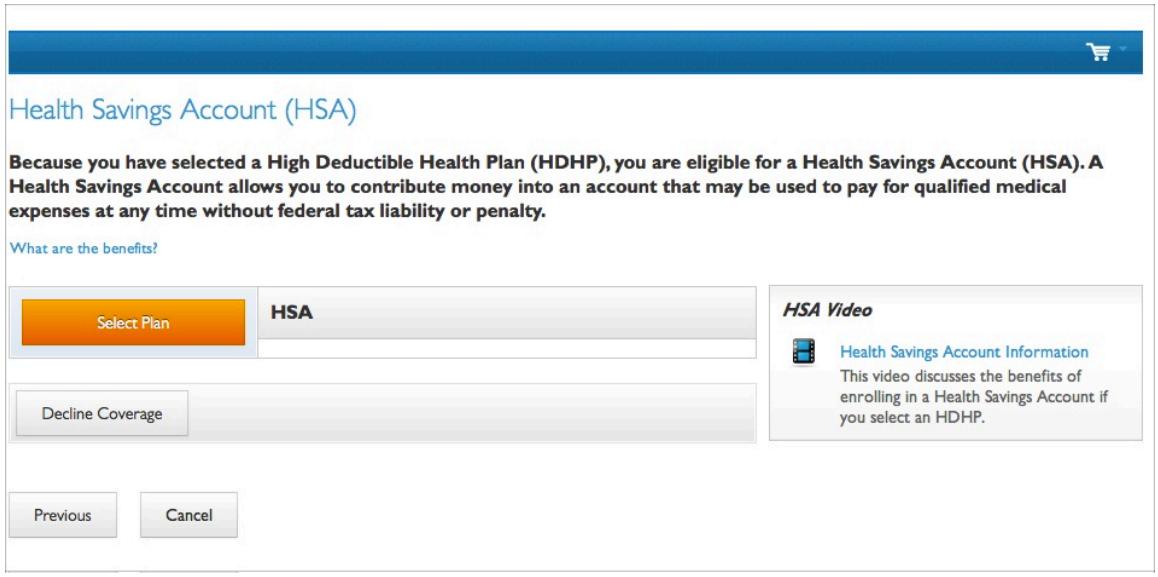
e. Determine who is actively covered on the policy, enter the dates, and select *Next*.



f. Review the details and select *Next*.

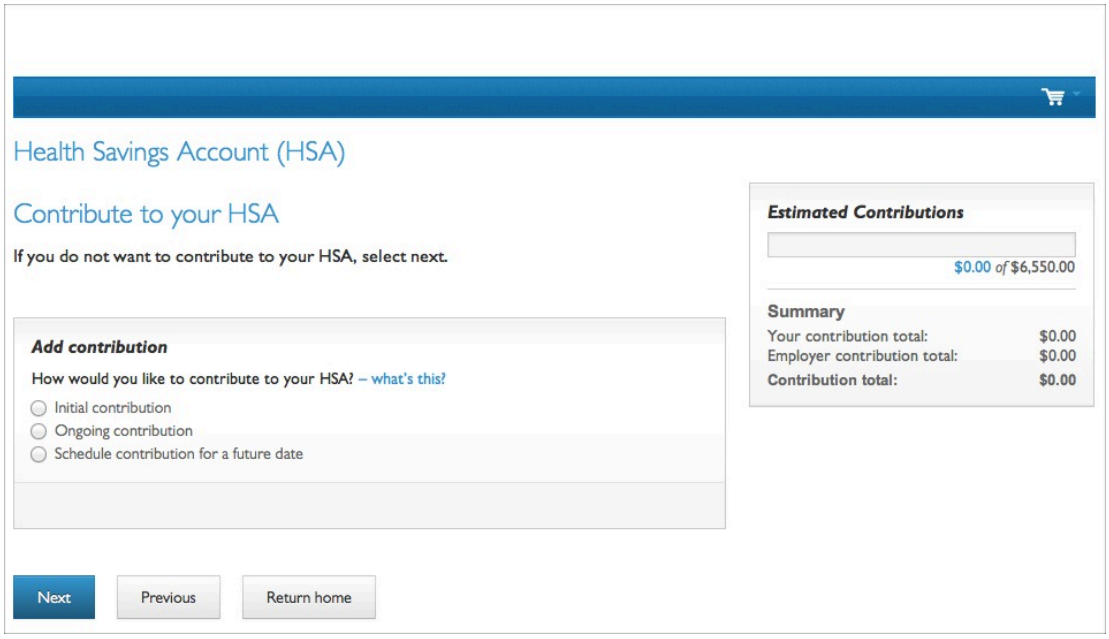


11. (If applicable) Review the information for the HSA. If you select the HSA, continue with **Step 11.a.** Otherwise, go to **Step 12** below.



a. Select how you would like to contribute to the HSA and select *Next*.

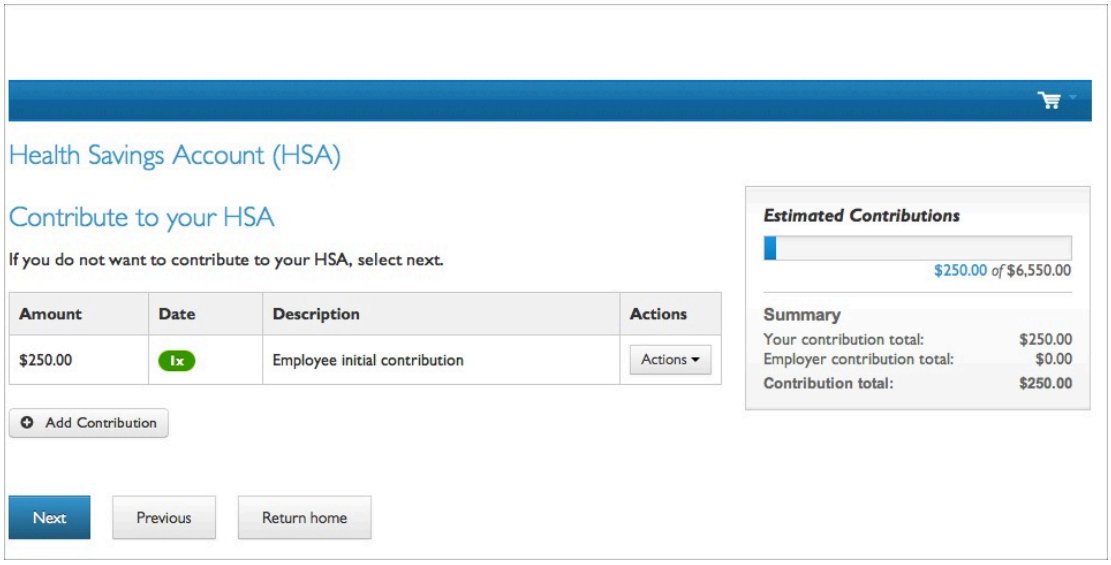
Note: the contribution strategy is determined for your company; you may not have all of these options



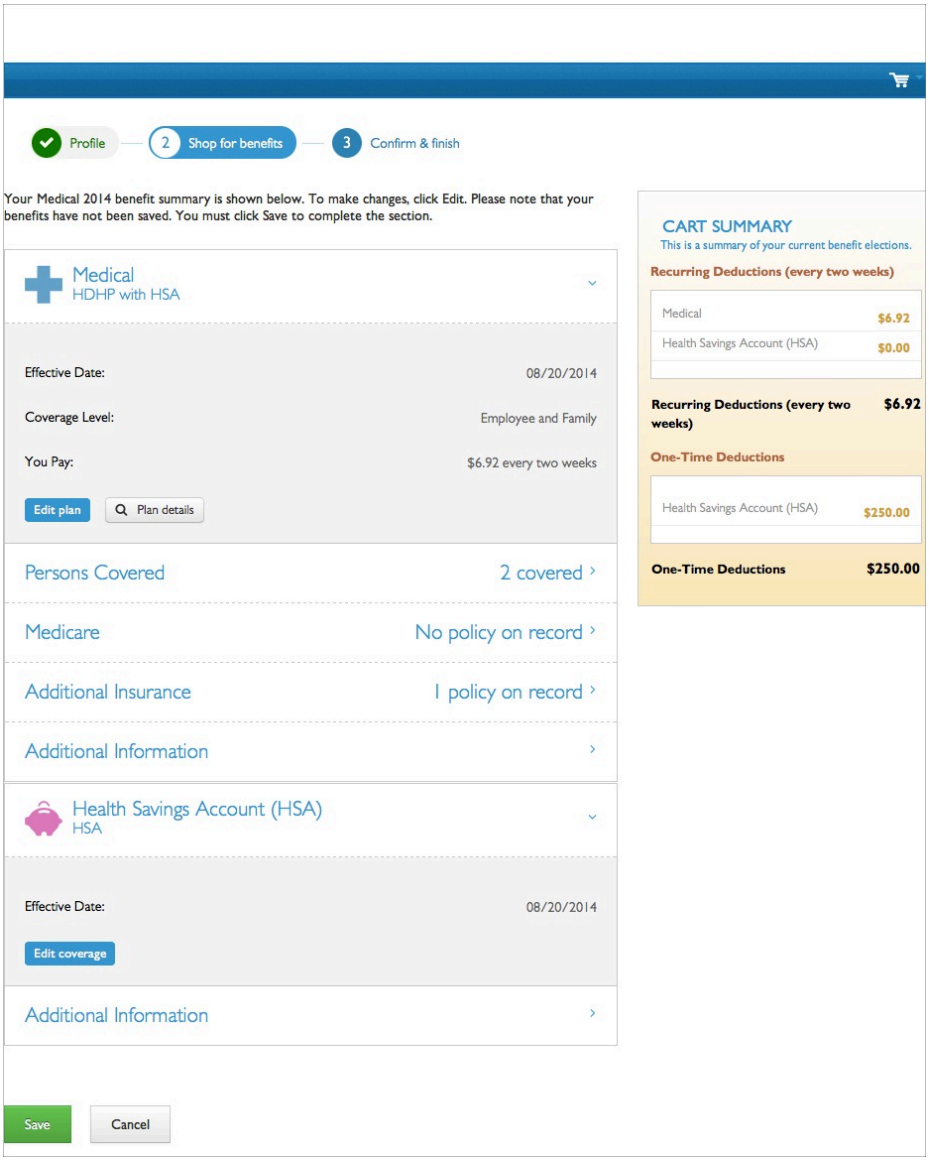
b. Enter the contribution amount and select *Add*.

c. Review your contribution information. You can edit or add contribution amounts. The *Estimated Contribution Amount* displays on the right side of the screen, showing how much you are contributing toward the taxable limit for HSAs.

d. Select *Next* to continue.

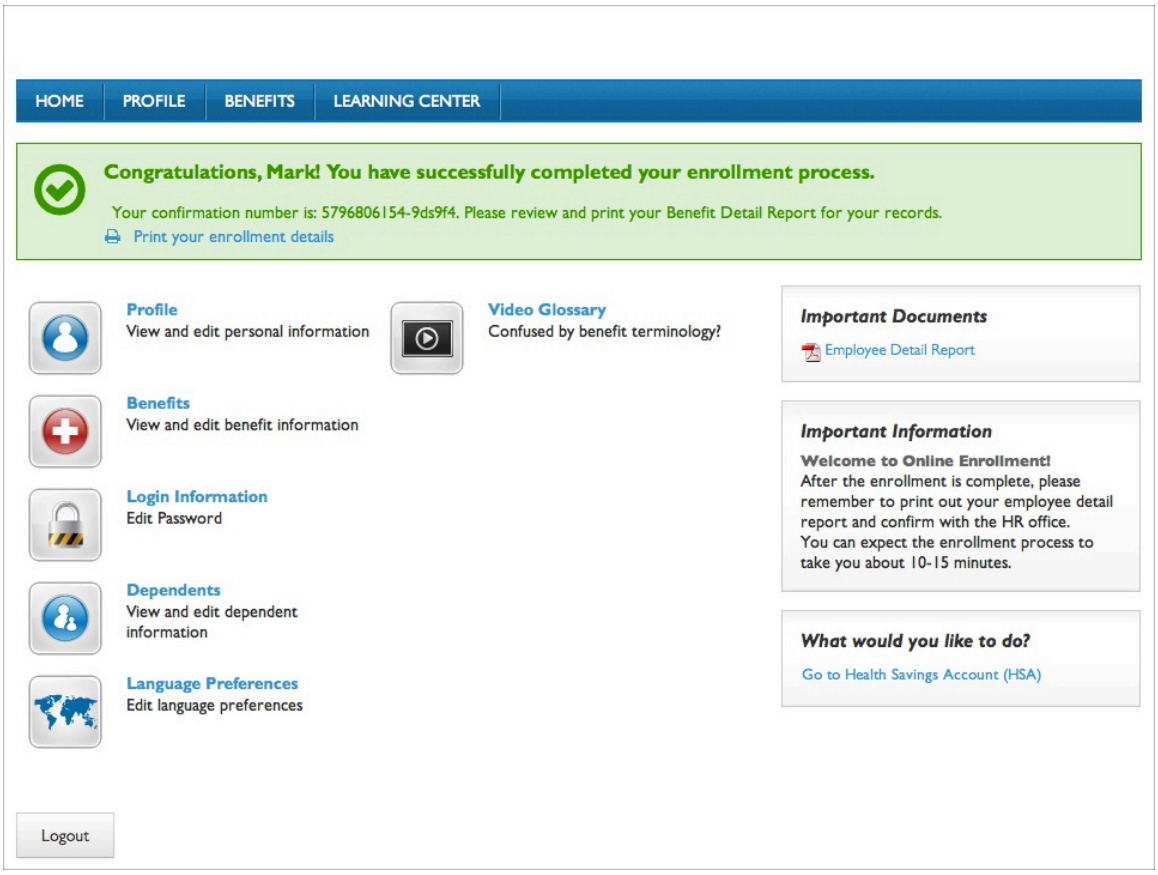


12. Review your benefit election information. The *Cart Summary* shows specific plan cost and contribution information. Expand any section to review more information and select the *Edit* button to make changes.



13. Select *Save* once you have completed all elections. You are returned to the Home page and receive the *Congratulations* message at the top of the screen.

14. Review and print your *Employee Detail Report* for your records.



Reviewing Benefit Costs

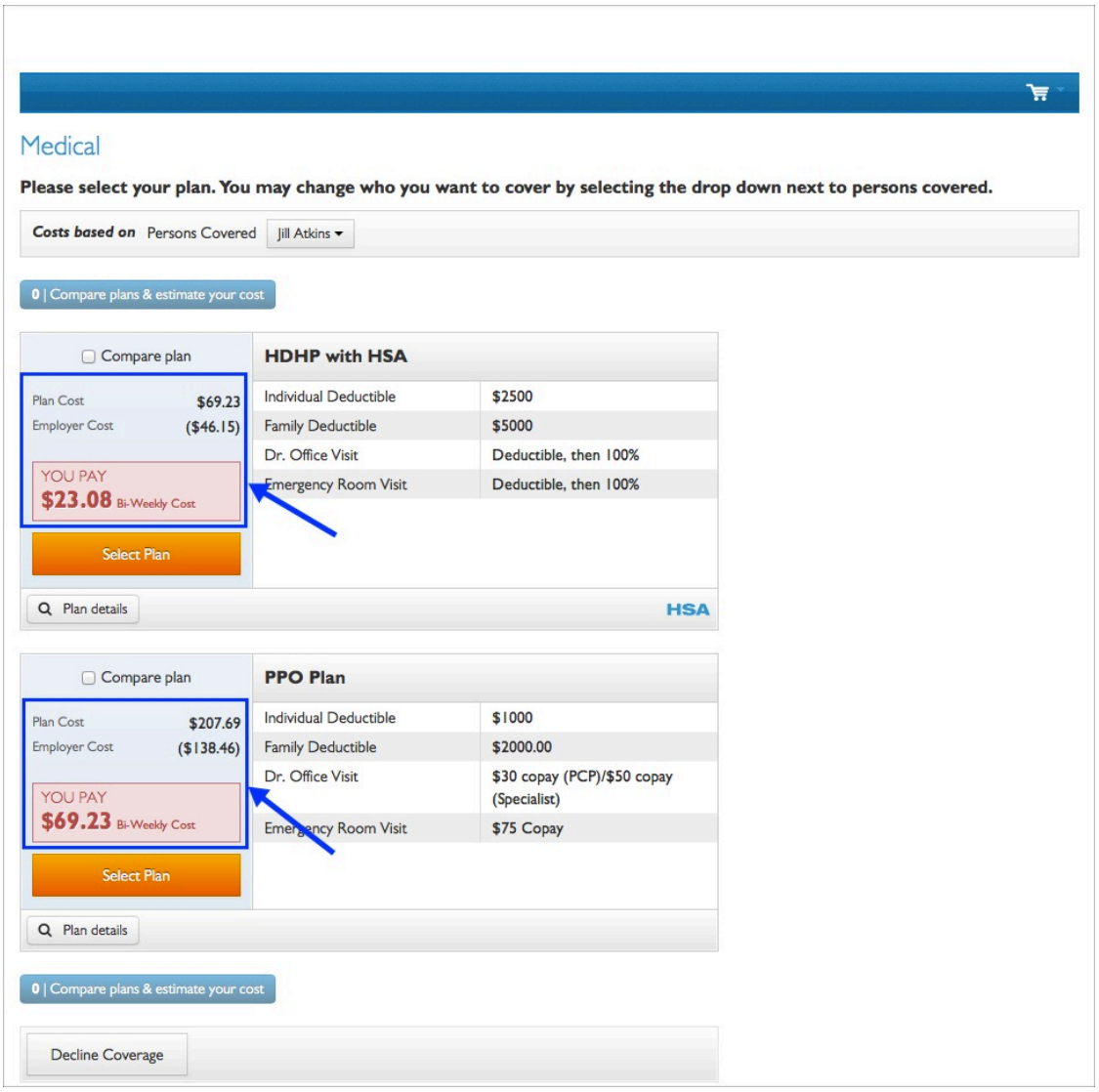
You will see information about your benefit costs throughout the enrollment workflow. If your company uses a *Defined Contribution* toward your benefits, you will see that amount in your *Cart*. If your company contributes toward your premium, you will see that amount on the Benefit Summary page.

You can review costs before you select the *Save* button. This section describes the different ways in which costs display to you. Note that these are only examples and that your experience may vary, depending on settings established for your company.

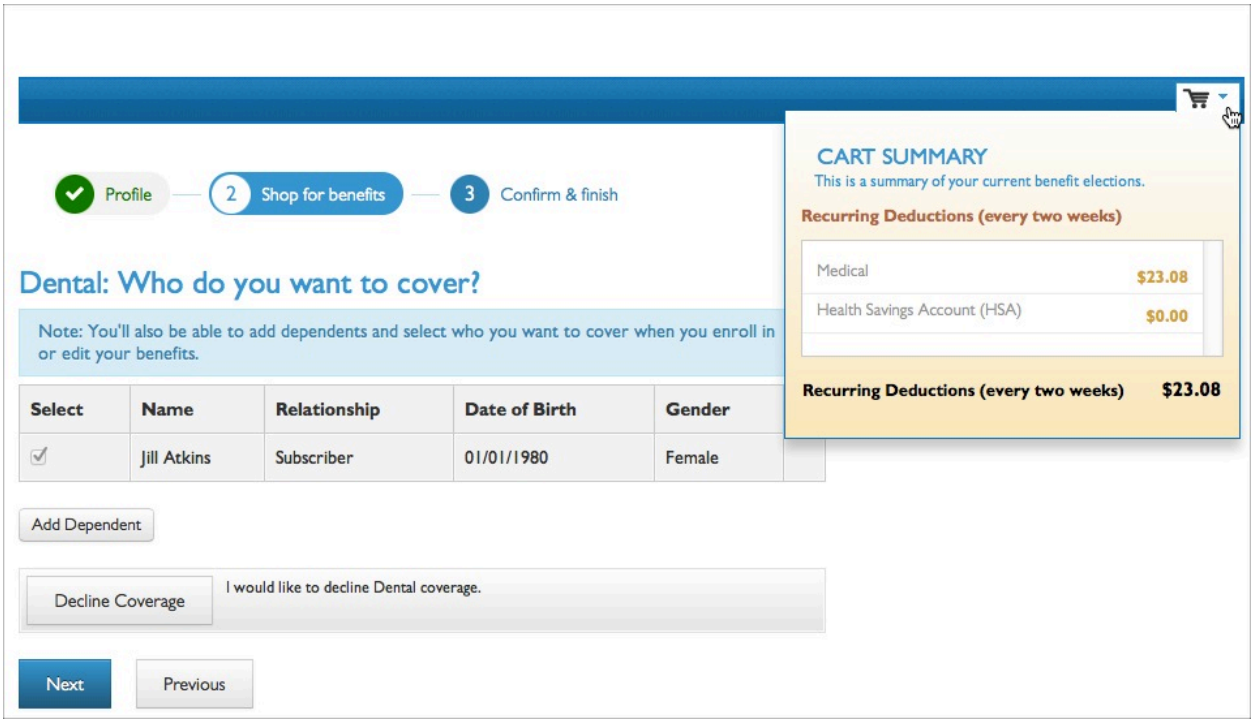
- Understanding Your Costs
- Reviewing Defined Contribution Information
- Understanding Employer Contributions Toward Financial Accounts

Understanding Your Costs

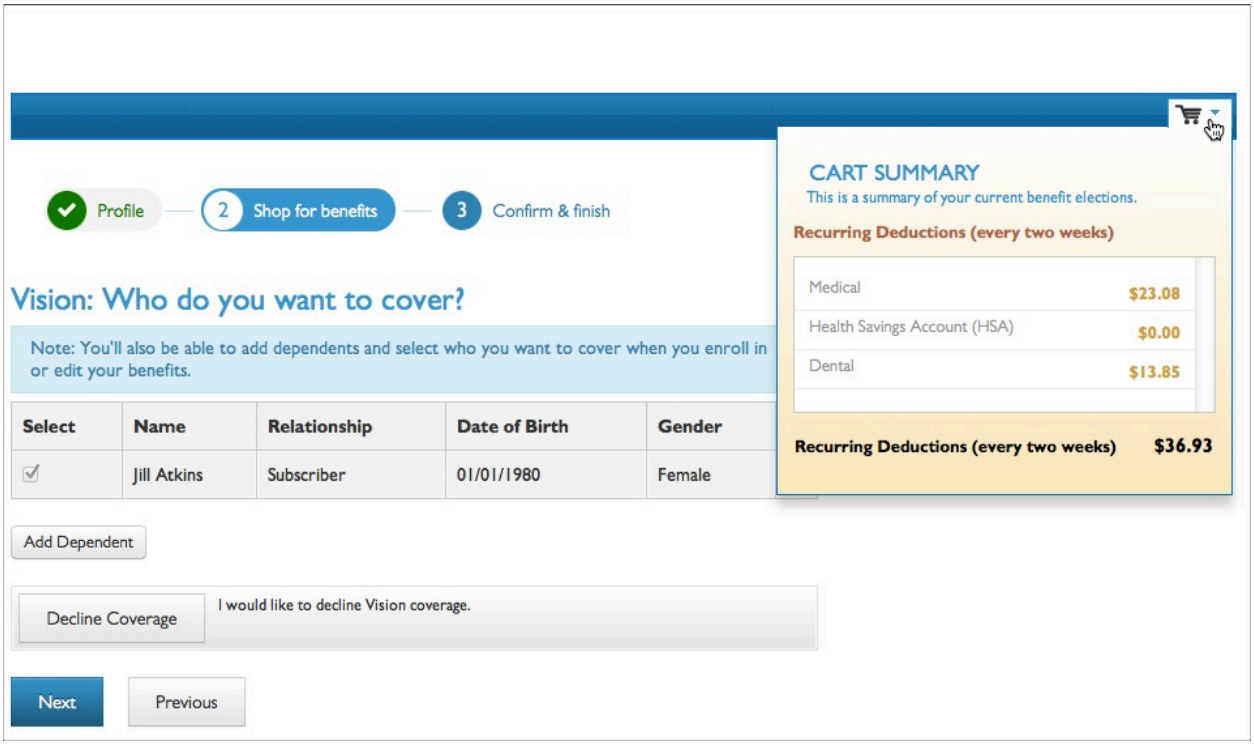
As you begin to shop for benefits, you will see the costs for each plan:



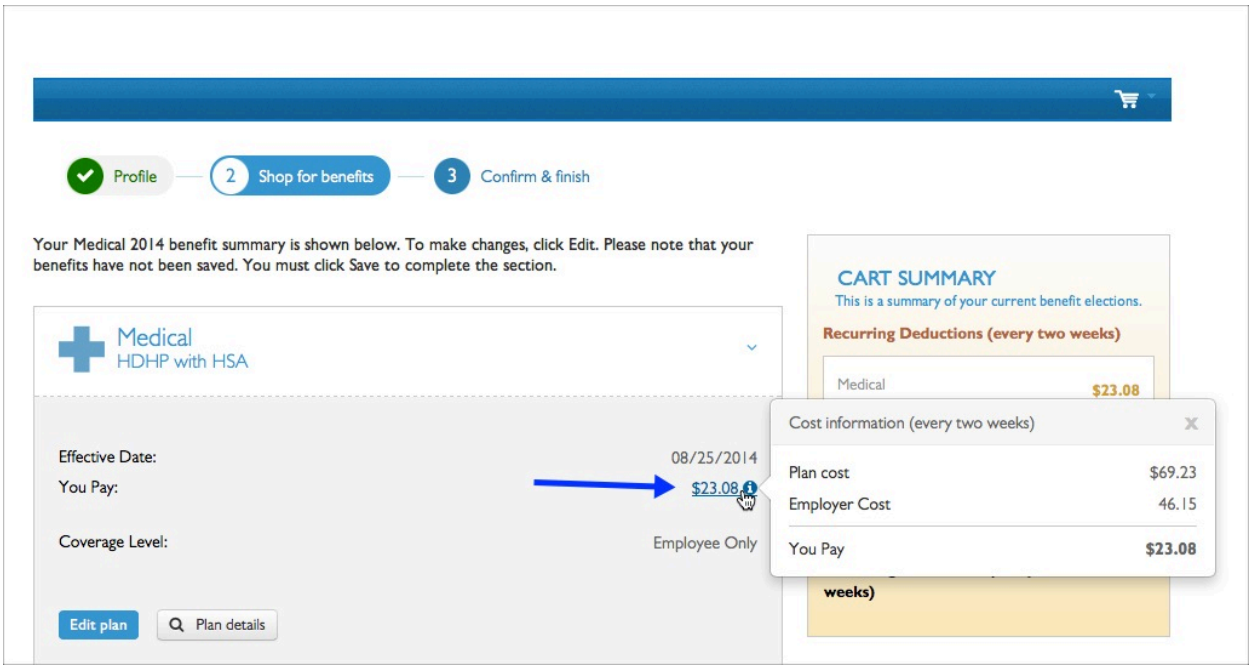
Once you select a plan, the costs will display in the *Shopping Cart*. You can select the cart icon in the top, right corner of the screen at any time to review what you have selected so far:



As you continue to shop, items are added to your cart, and you can continue to review your costs:



As with any online shopping cart, these items are not final until you submit them. On the Benefit Summary page, you can review all of your items and see the total costs in the *Cart Summary* box. You can also see the breakdown of costs, if applicable, by selecting the icon next to the amount that you will pay for benefits:

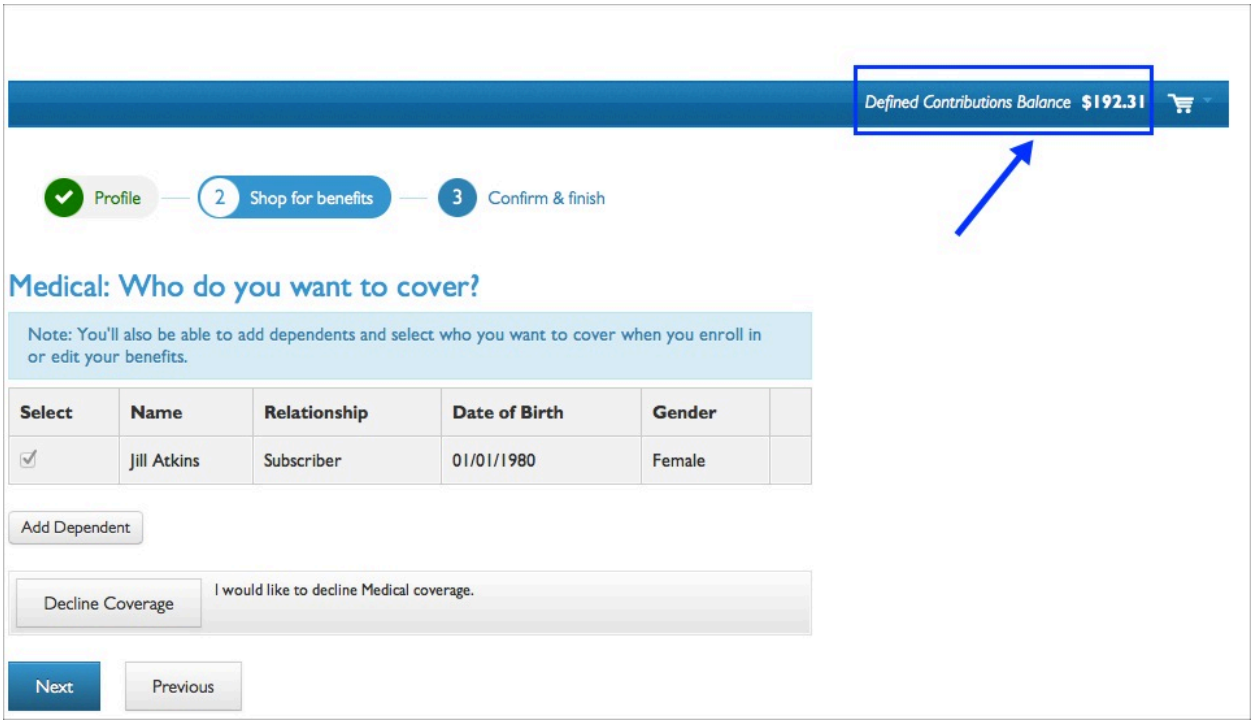


Once you select the *Save* button, your benefits are submitted to your Benefits Administrator for review. Once approved, your benefit election information is sent to the insurance carrier.

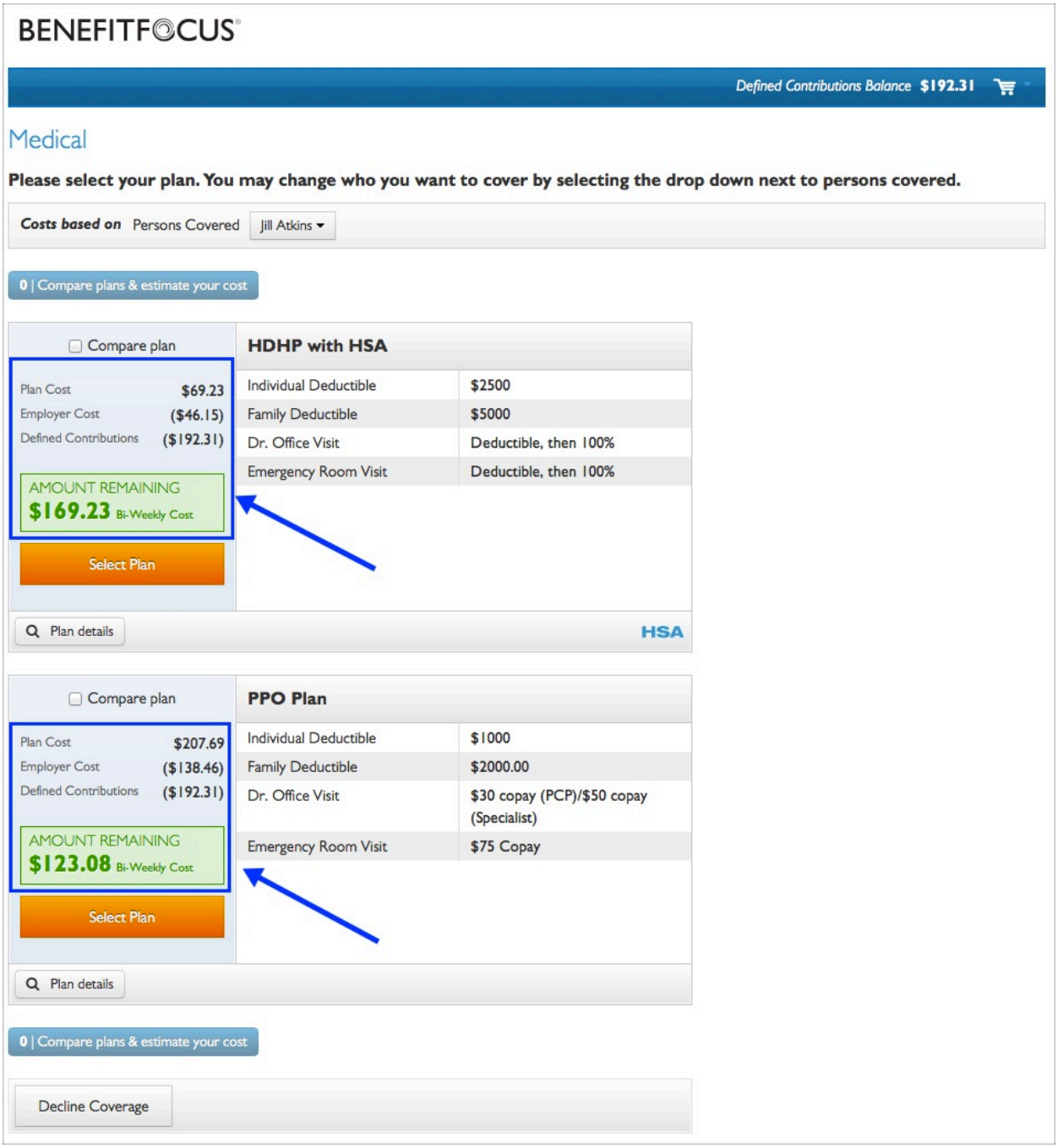
Reviewing Defined Contribution Information

If your employer uses a defined contribution strategy, you will see the amount your employer is contributing toward you benefits in the *Shopping Cart*. Defined contribution works much like a gift cart. Your employer contributes a specified amount toward your benefits, and each time you select a benefit, that amount is reduced from the total amount in your cart.

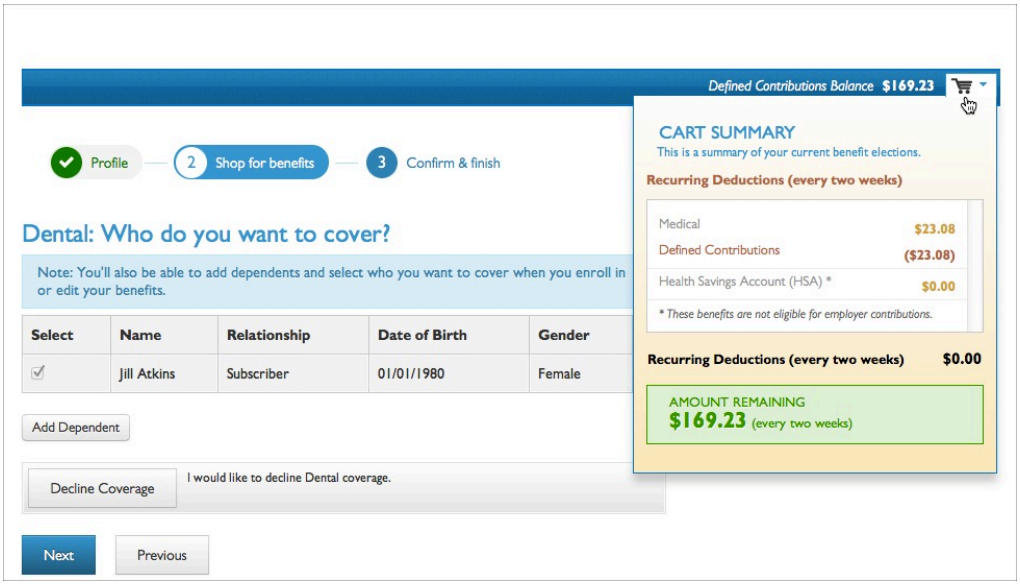
Once you begin the enrollment process, the defined contribution balance displays next to the *Shopping Cart*:



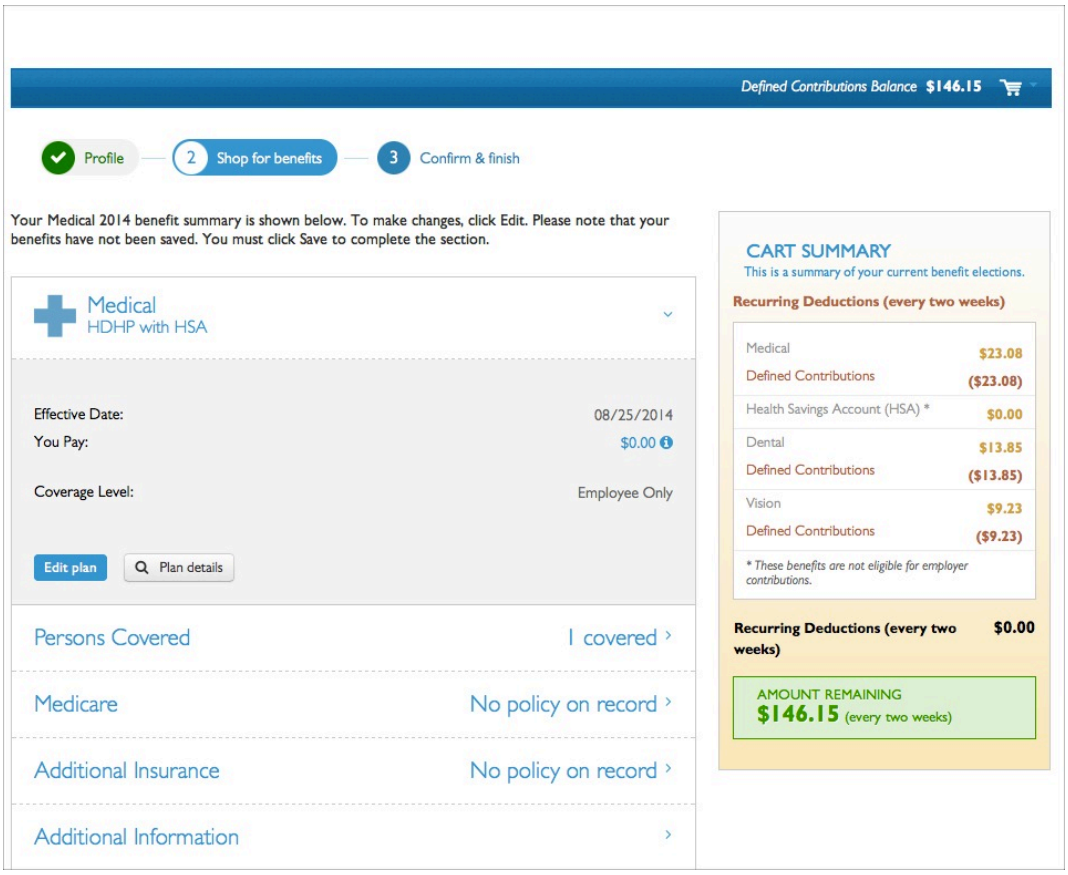
On the Plan Selection page, you will see the cost per benefit, including the defined contribution amount from your employer:



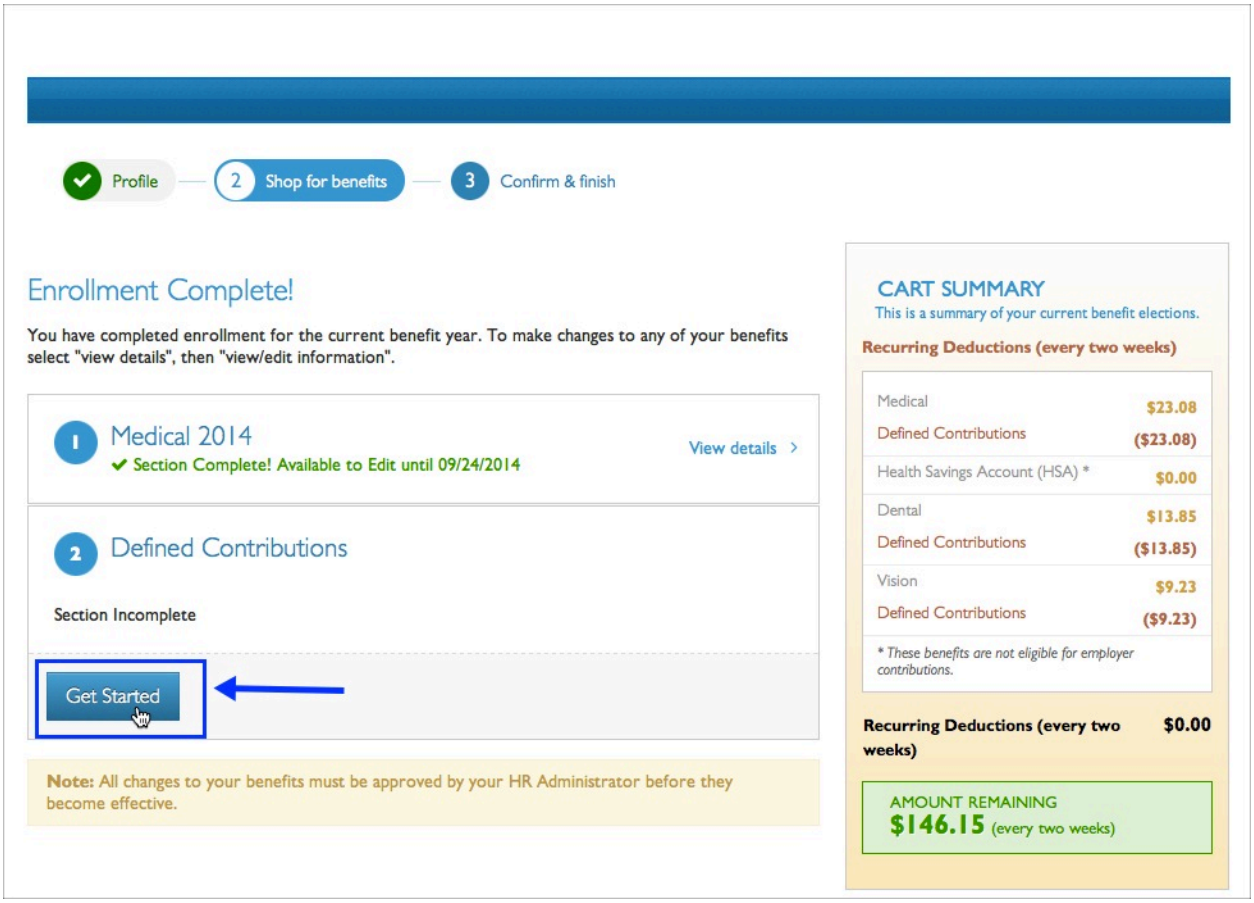
As you continue to shop for benefits, the defined contribution amount will be reduced by the cost of the benefits you have selected:



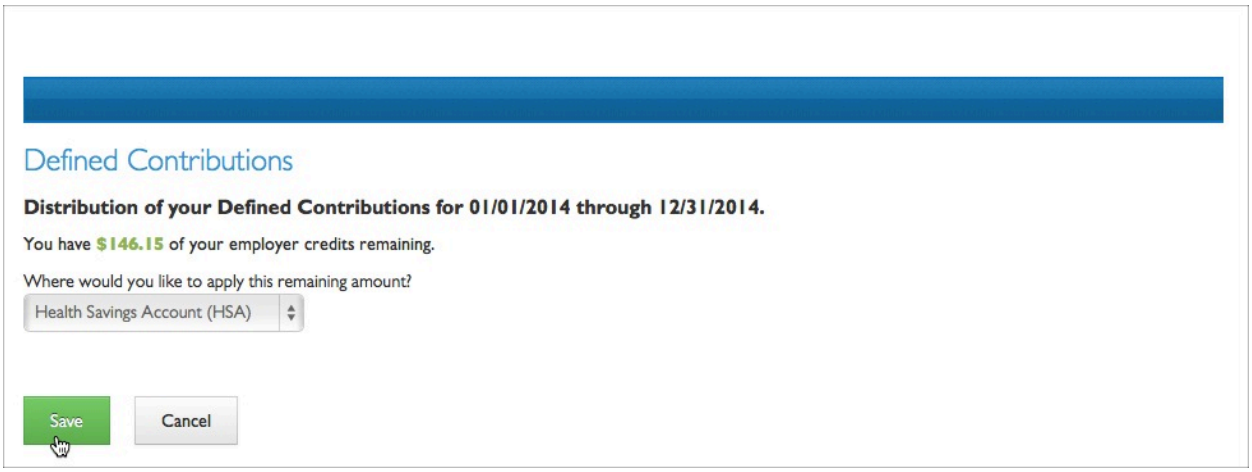
The Benefit Summary page will show the detailed cost for each plan, including (if applicable) any amount remaining:



If your employer allows you to keep remaining amounts, you will be directed to apply them accordingly after you save your benefit elections. First, you will select the *Get Started* button:

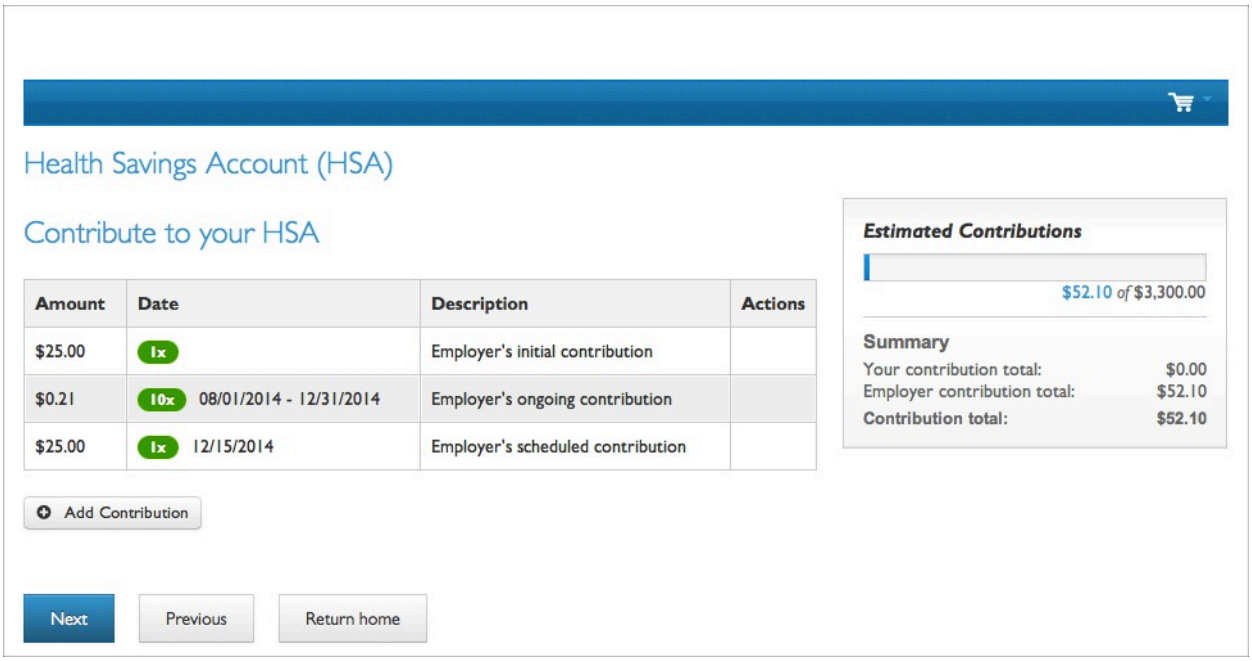


Then, you will apply the remaining amount and select *Save*:



Understanding Employer Contributions Toward Financial Accounts

If your employer contributes an amount towards your financial accounts, you will see the contribution in addition to any amount you may be permitted to contribute. For example, your employer may contribute an initial, ongoing, and/or scheduled amount toward your Health Savings Account (HSA). If so, the amount(s) will display on the HSA Contribution screen:



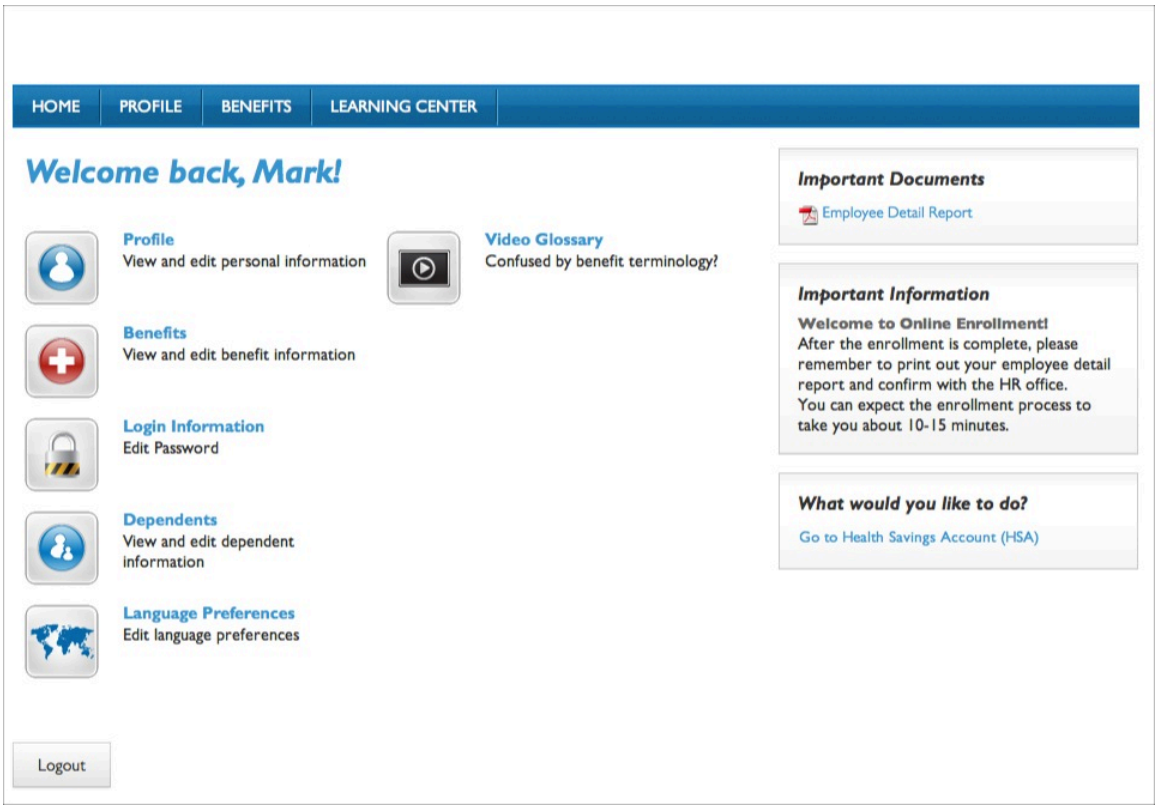
- An *initial contribution* is applied once toward your HSA when you initially enroll in benefits.
- An *ongoing contribution* is applied per pay period for a specified amount of time.
- A *scheduled contribution* is applied once on a specific day in the future.

You may or may not need to contribute toward your HSA in order for your employer's contribution(s) to be activated. As with your employer contributions, you may be able to contribute an initial, ongoing, and/or scheduled amount.

Note: HSA and other financial account contributions are dependent on the rules established for your employer. You may see different amounts and different contribution strategies, depending on these rules. The above screen is used for example purposes only.

Making Changes to Benefit Elections

- Reviewing Your Benefits Elections
- Entering a Life Event to Make Changes to Benefit Elections

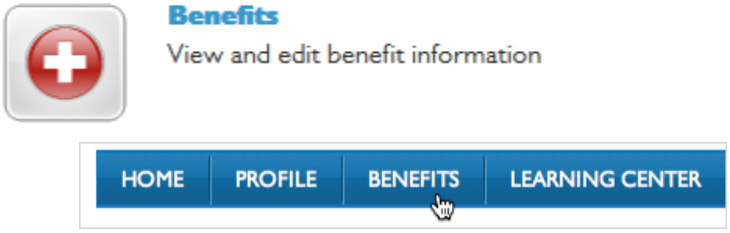


Reviewing Your Benefits Elections

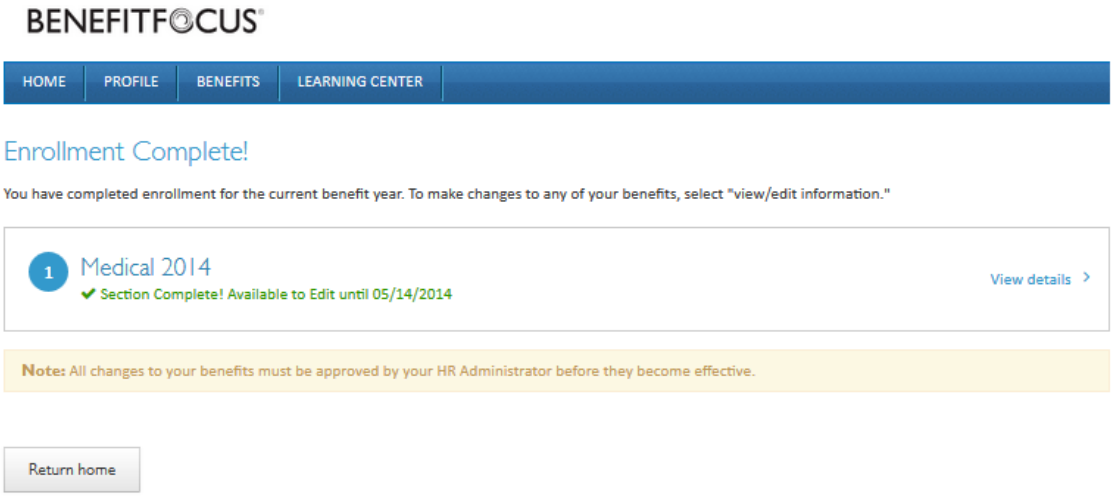
Once you have completed and saved your benefit elections, you can review them and make any changes if necessary. *Note*: You may be required to enter a qualifying life event to make changes to your benefit. If so, please see the next section entitled *Entering a Life Event to Make Changes to Benefit Elections*.

To make changes to current benefit elections, follow these steps:

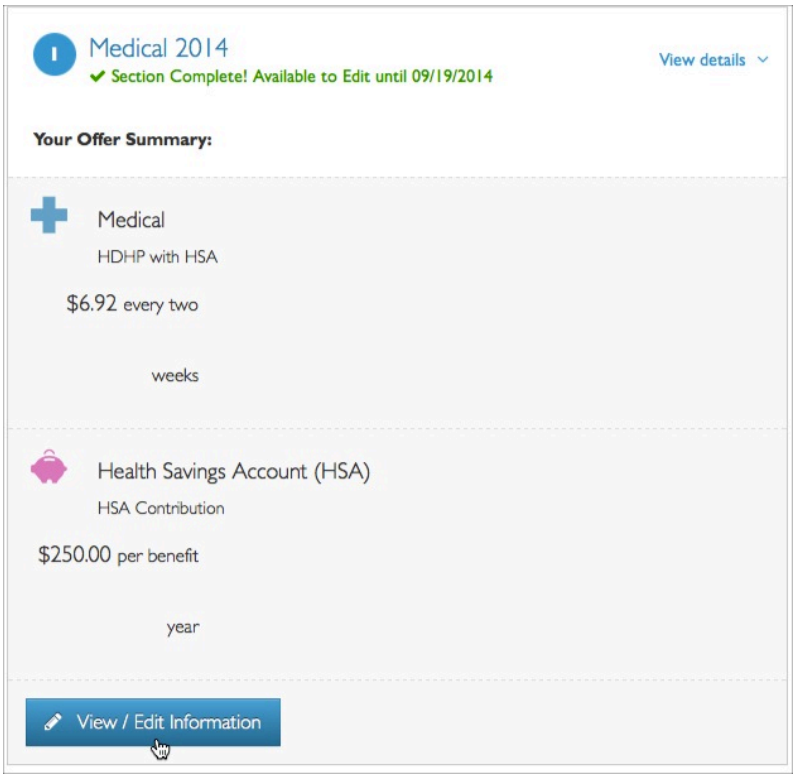
1. Select the *Benefits* link from the Home page or from the *Navigation Bar.*



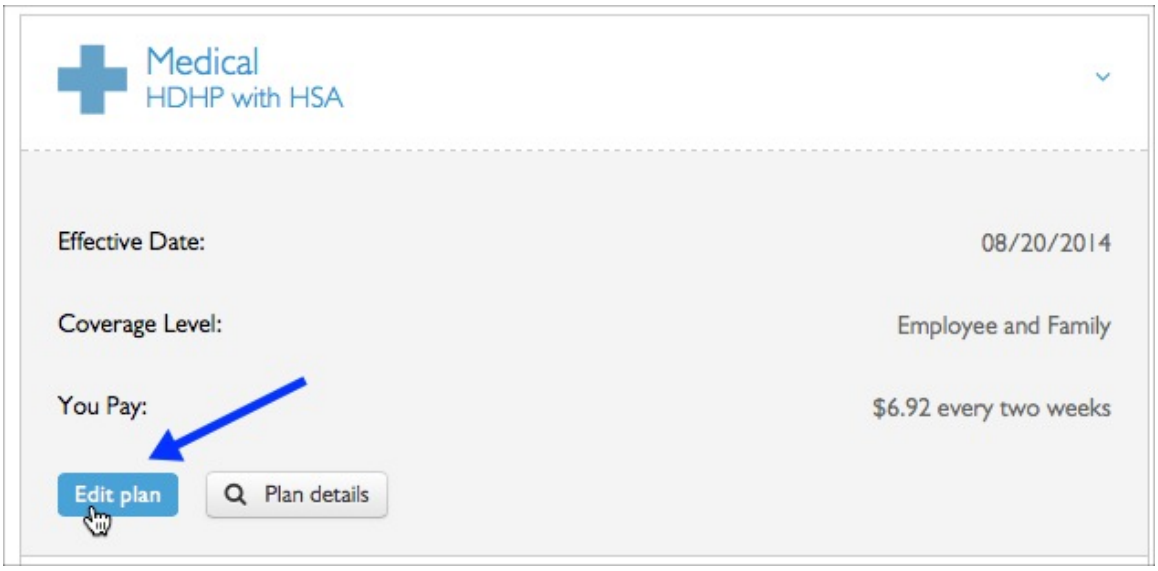
2. Use the *View details* link to review your elections.



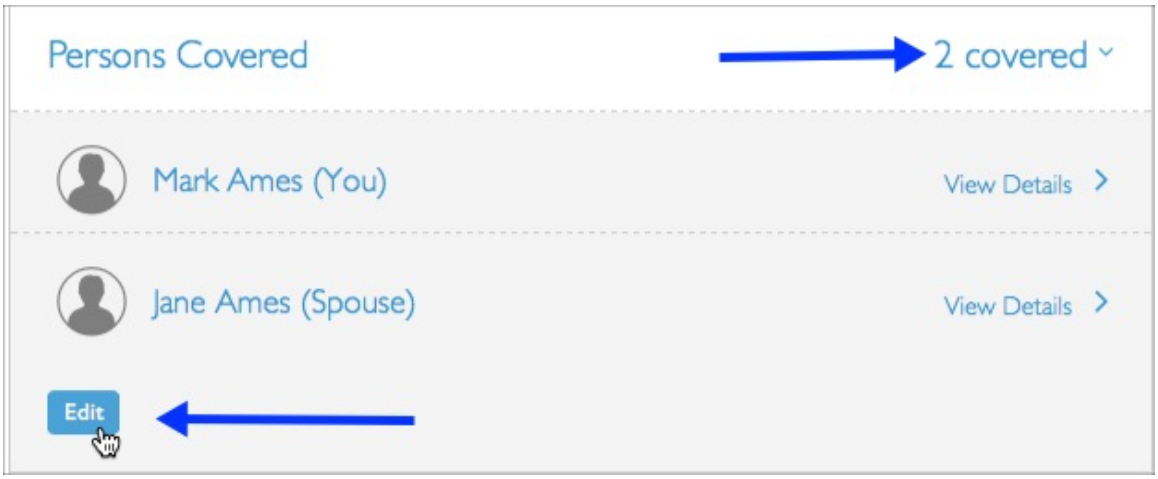
3. Select the *View/Edit Information* button to update plan selection details.



4. Select the *Edit plan* button to change your benefit plan.

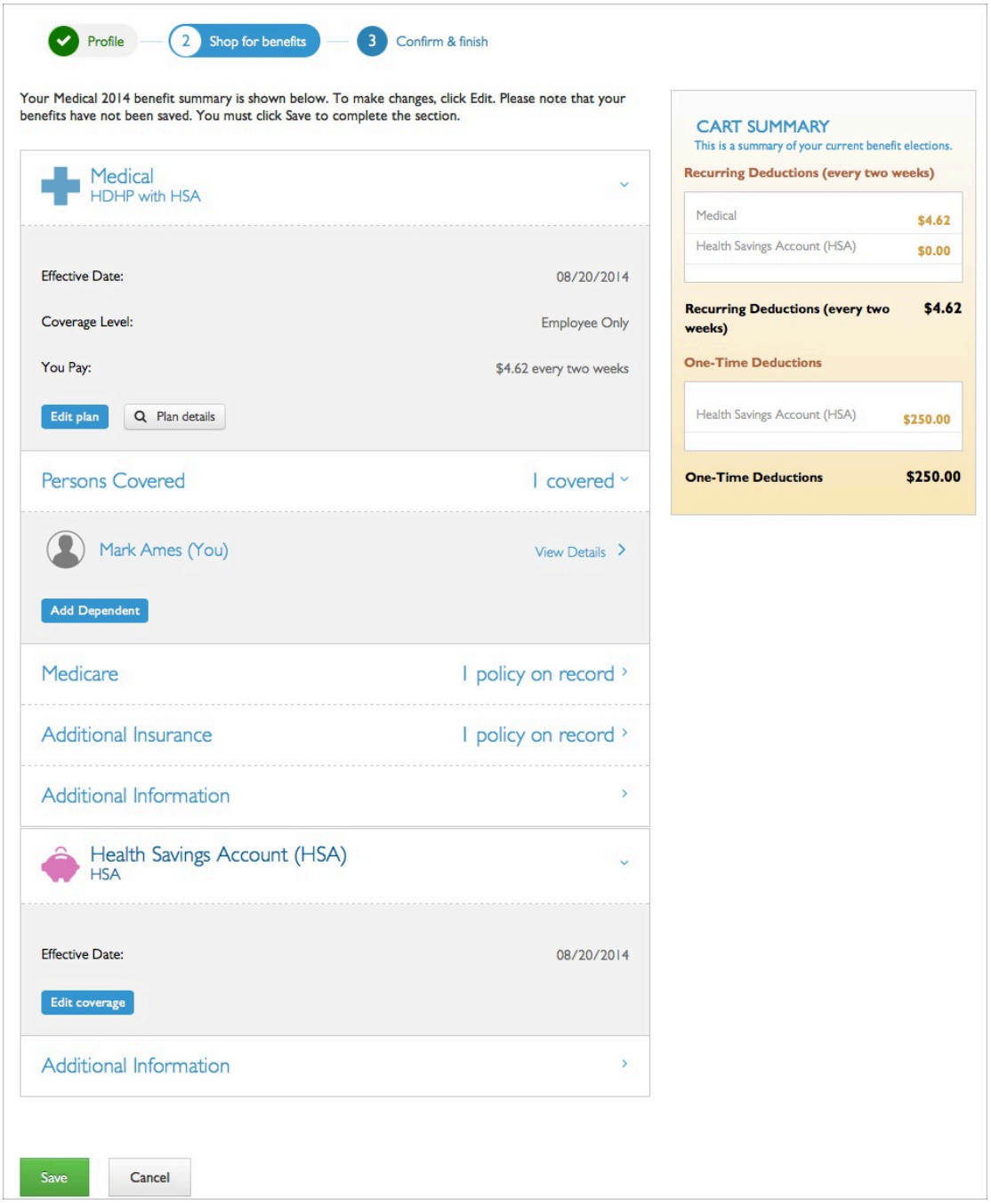


5. Expand any section and select the *Edit* button to update other information.

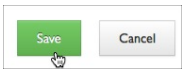


6. Continue making any necessary changes to your information.

7. Review your changes you return to the Benefit Summary screen.



8. Select *Save* to save your changes.

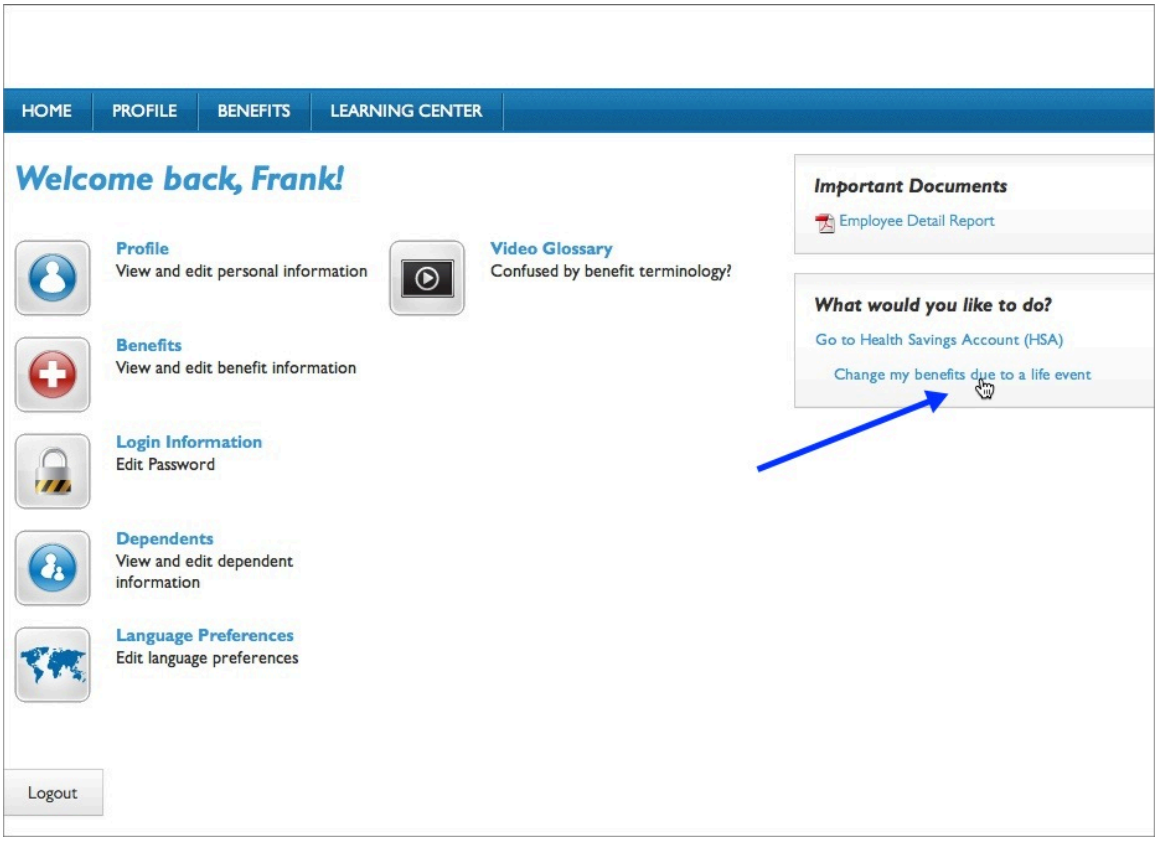


Entering a Life Event to Make Changes to Benefit Elections

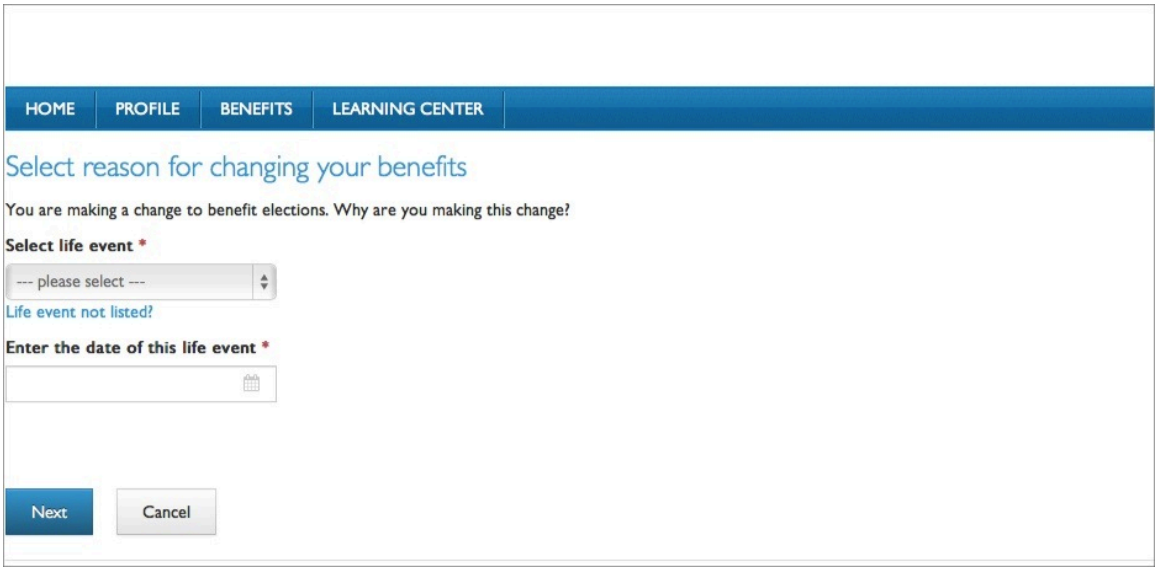
Life events are reasons that your may add and remove dependents or change benefit elections. These are defined by the insurance carrier for your company. They typically include events such as a having a baby, adoption, marriage, divorce, legal separation, military leave, return from military leave, and so on.

The following steps show how to enter a marriage life event in the system. Steps for other life events may vary; marriage is just used as an example here.

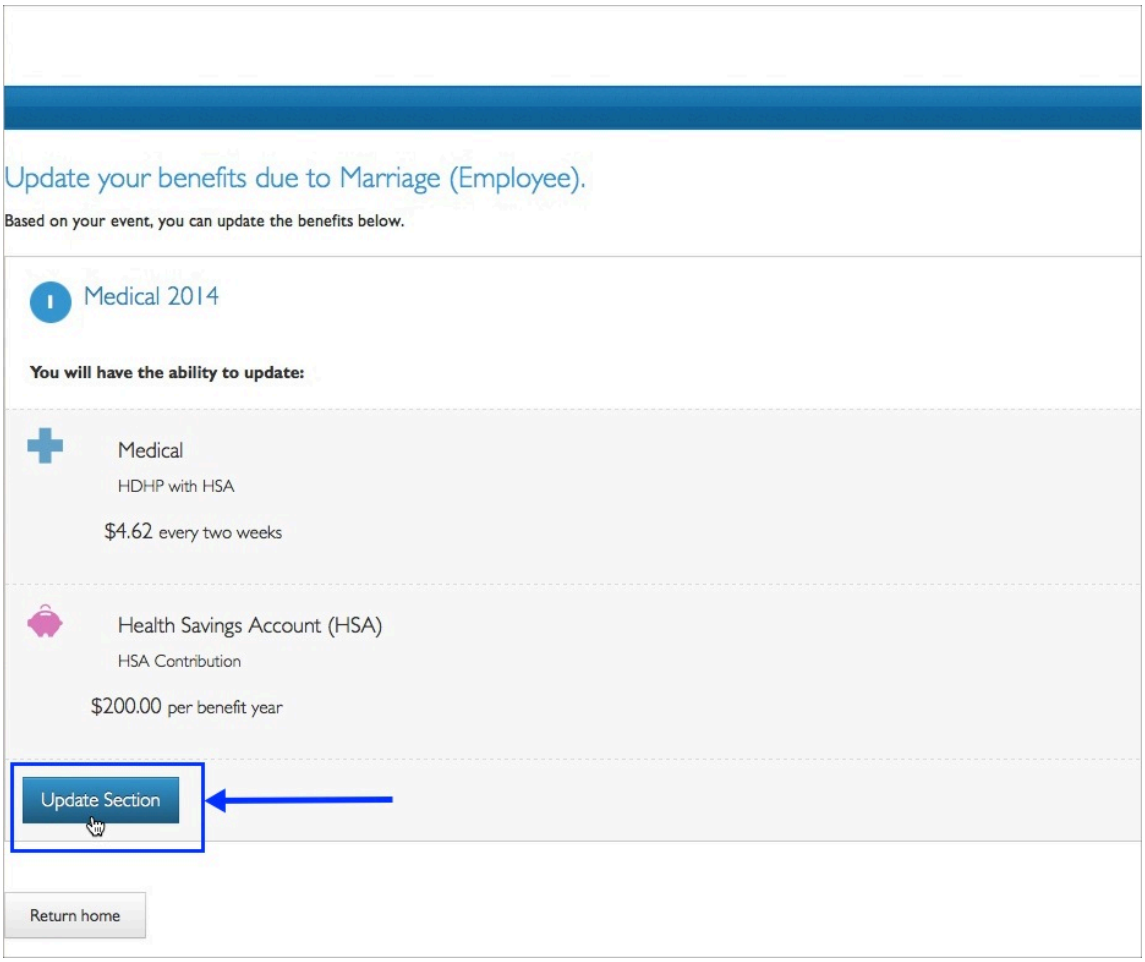
1. Select *Change my benefits due to a life event* from the Home page.



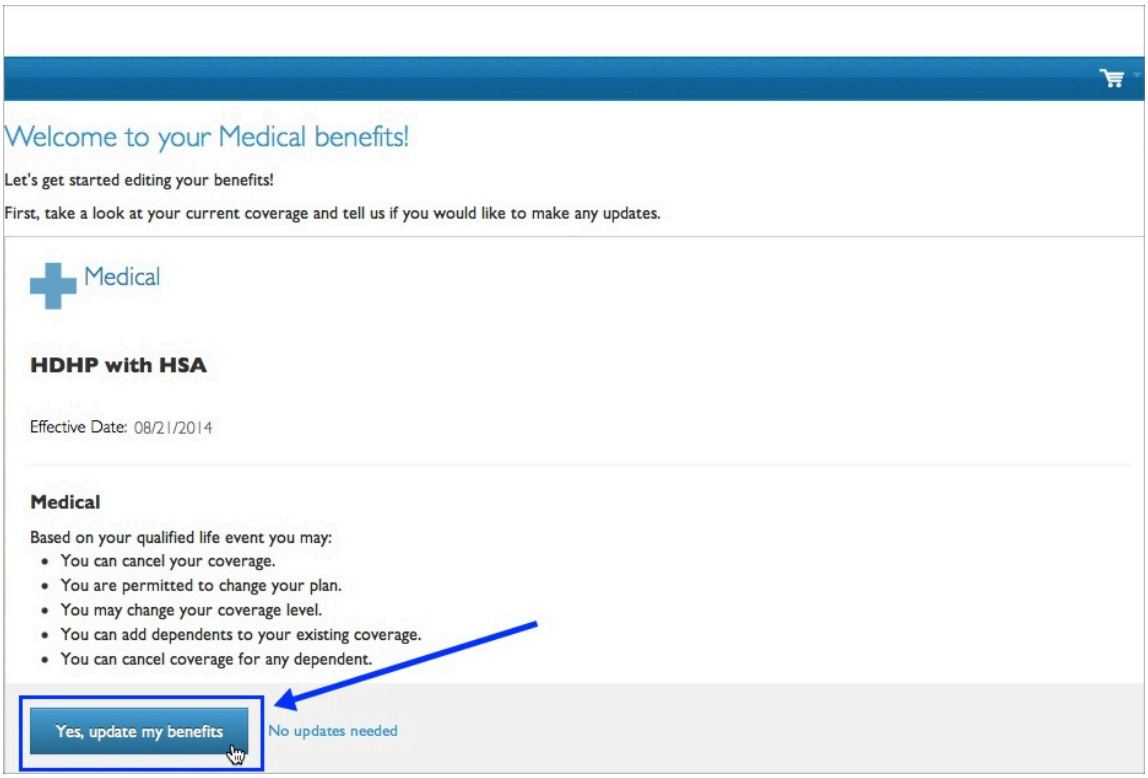
2. Select the life event from the drop-down box, enter the date of the event, and select *Next*.



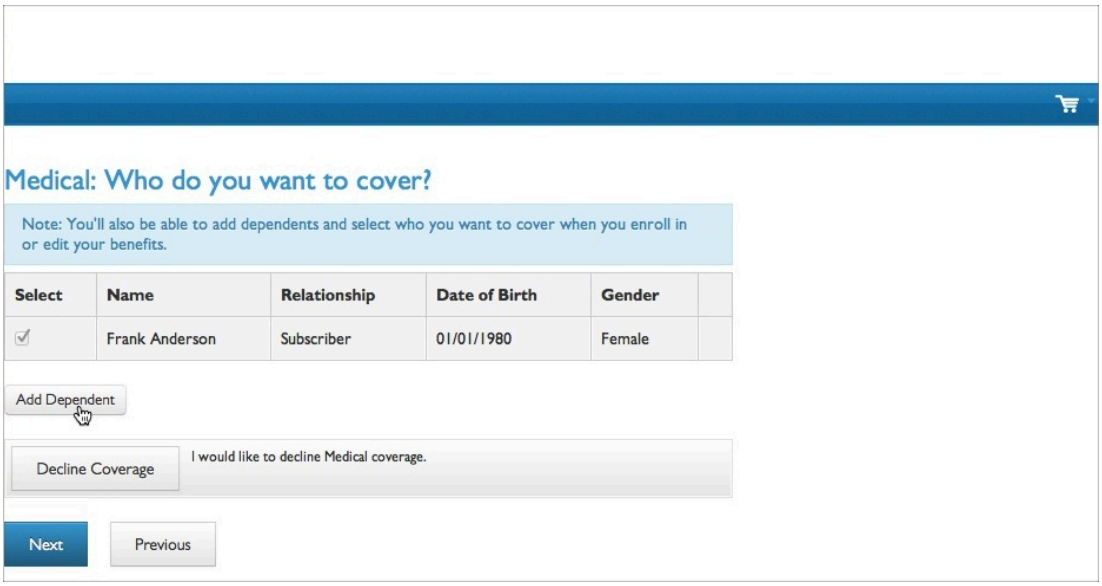
3. Select the *Update Section* button.



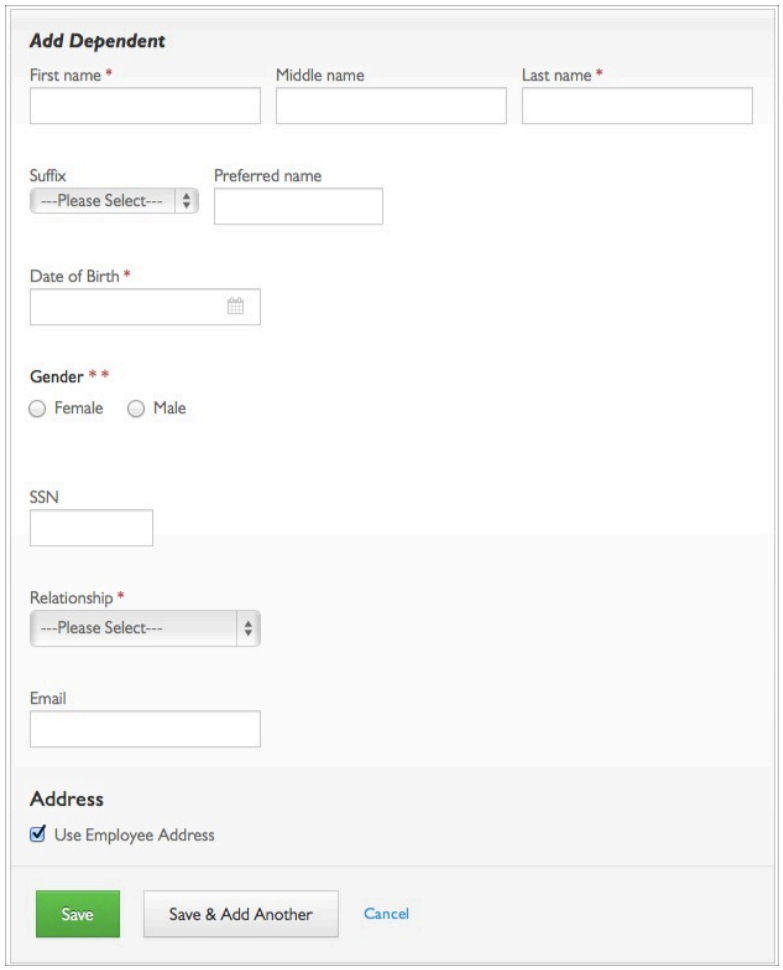
4. Review the information and select *Yes, update my benefits* when you are ready to make changes.



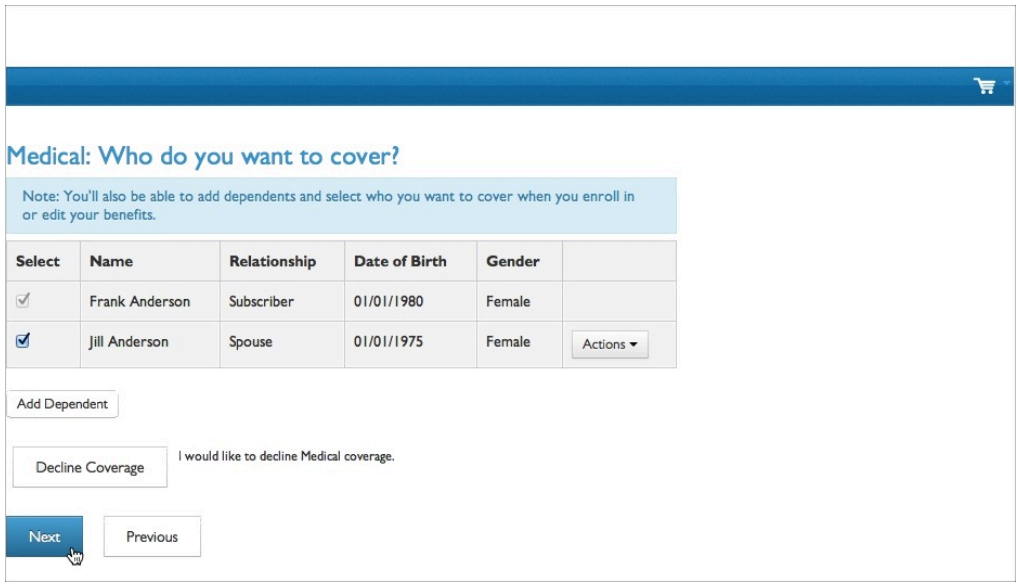
5. Select the *Add Dependent* button to add your spouse to the policy.



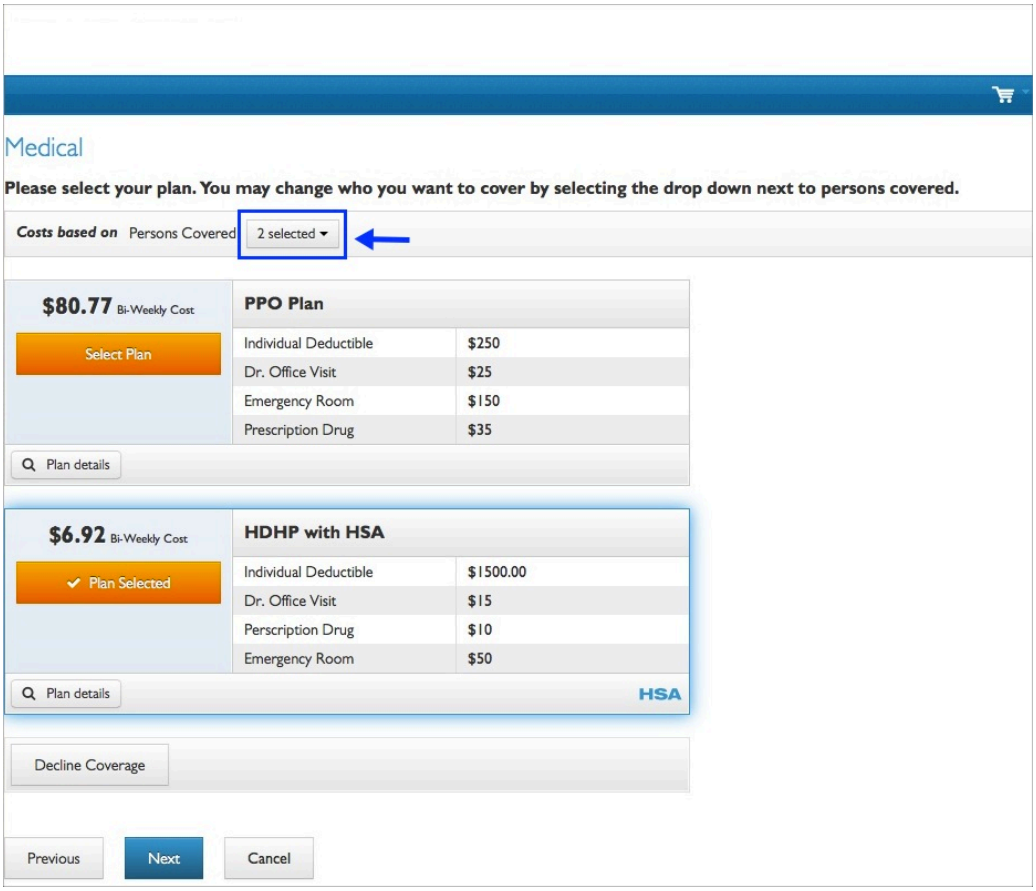
6. Enter the dependent's required information and select *Save*.



7. Review the dependent's information and select *Next*.

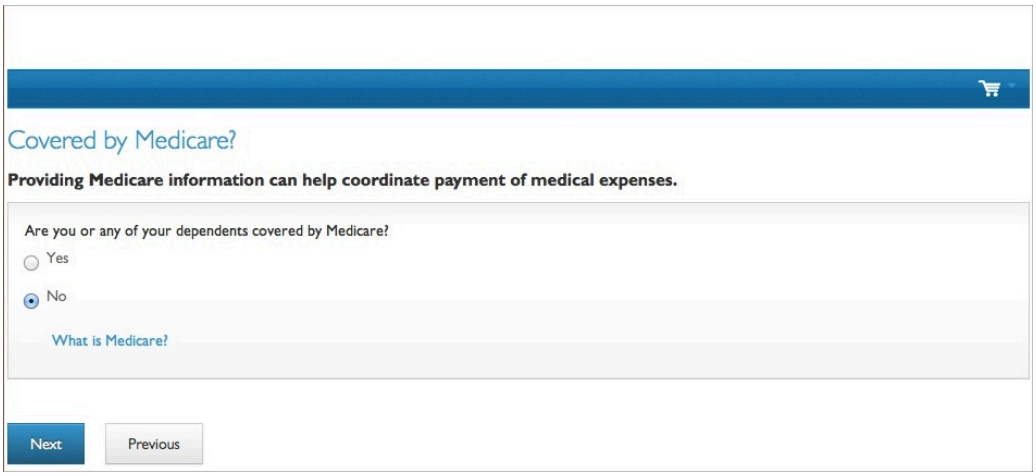


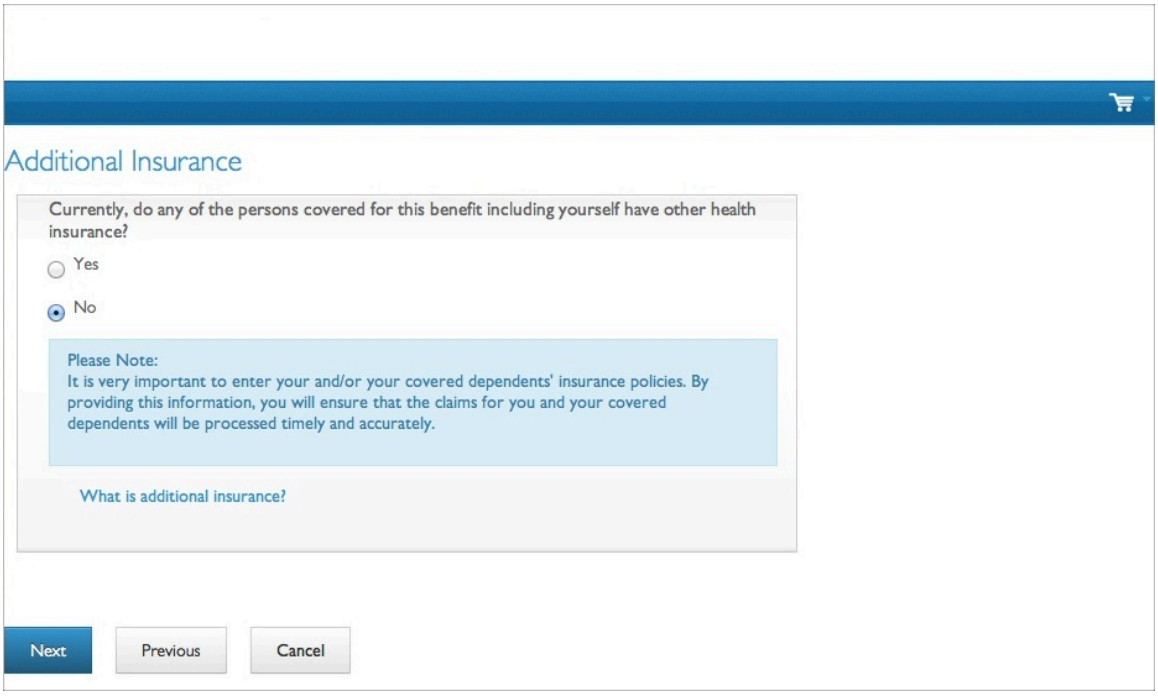
8. Review the information on the Plan Selection page. Your current benefit selection is outlined in blue and shows *Plan Selected*. Notice the *Persons Covered* box now shows *2 selected* since you added a spouse. Depending on the rules established for your company, you may be able to change your benefit plan.



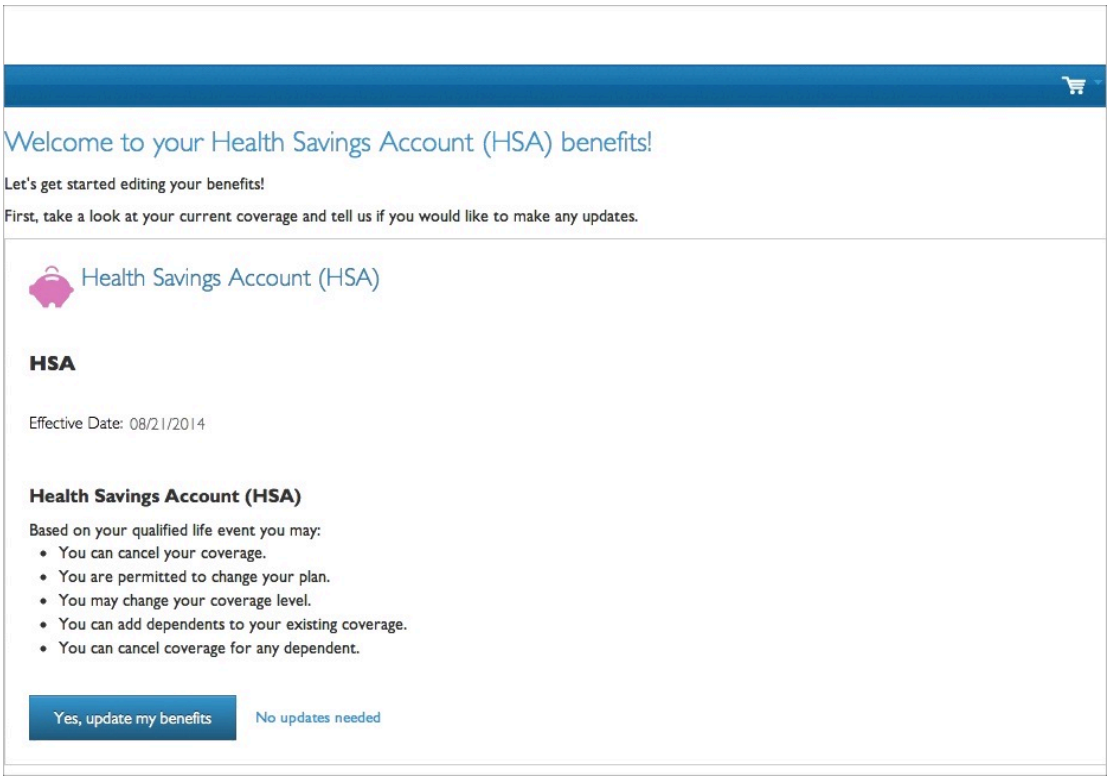
9. Select *Next* on the Plan Selection page to continue.

10. Continue with the benefit enrollment process. In this scenario, answer the Medicare and Additional Insurance questions:

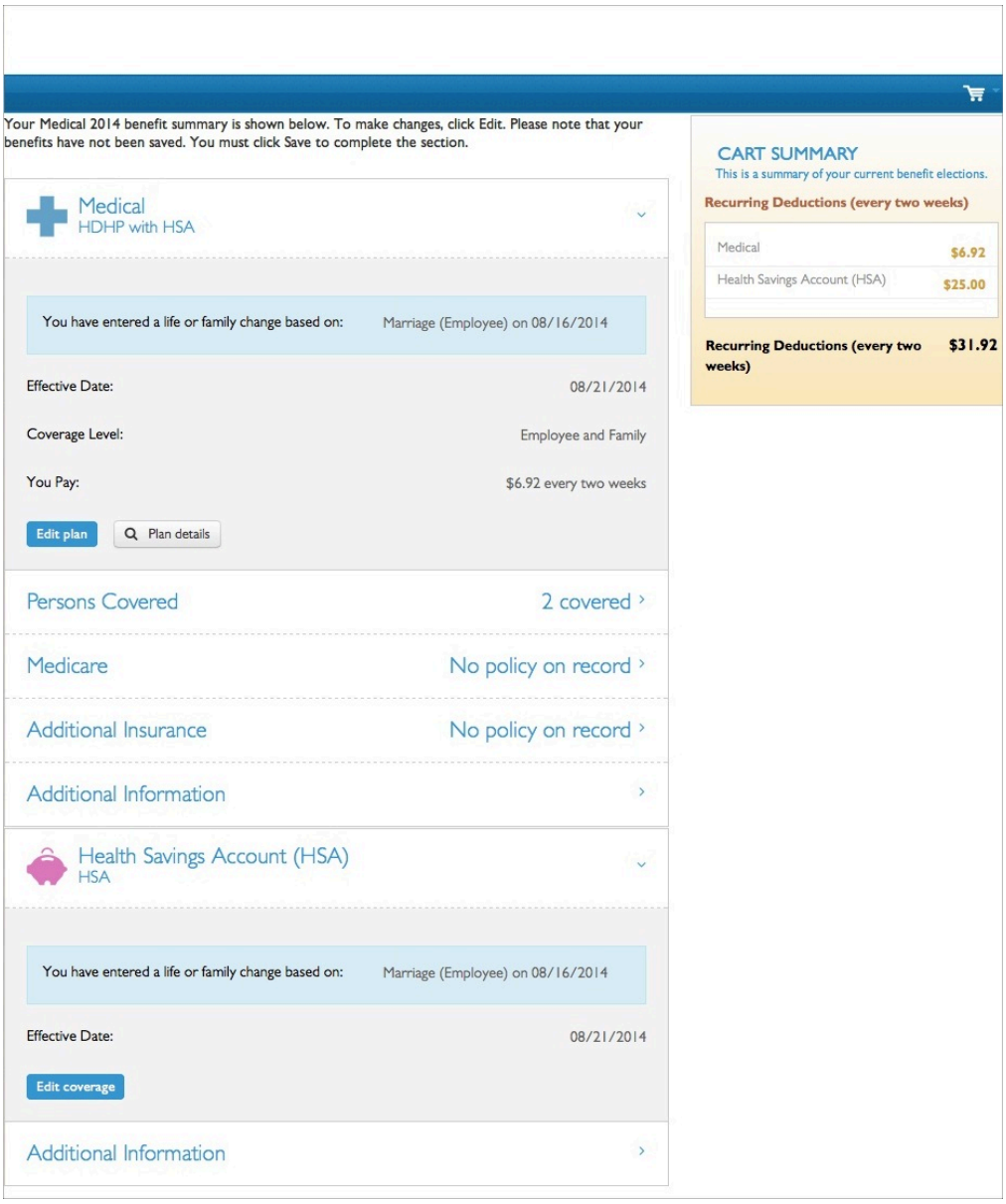




11. (If applicable). Make changes to other information, such as your HSA contribution.



12. Continue reviewing information and making applicable changes until you reach the Benefit Summary page. Review your information on the Benefit Summary page.

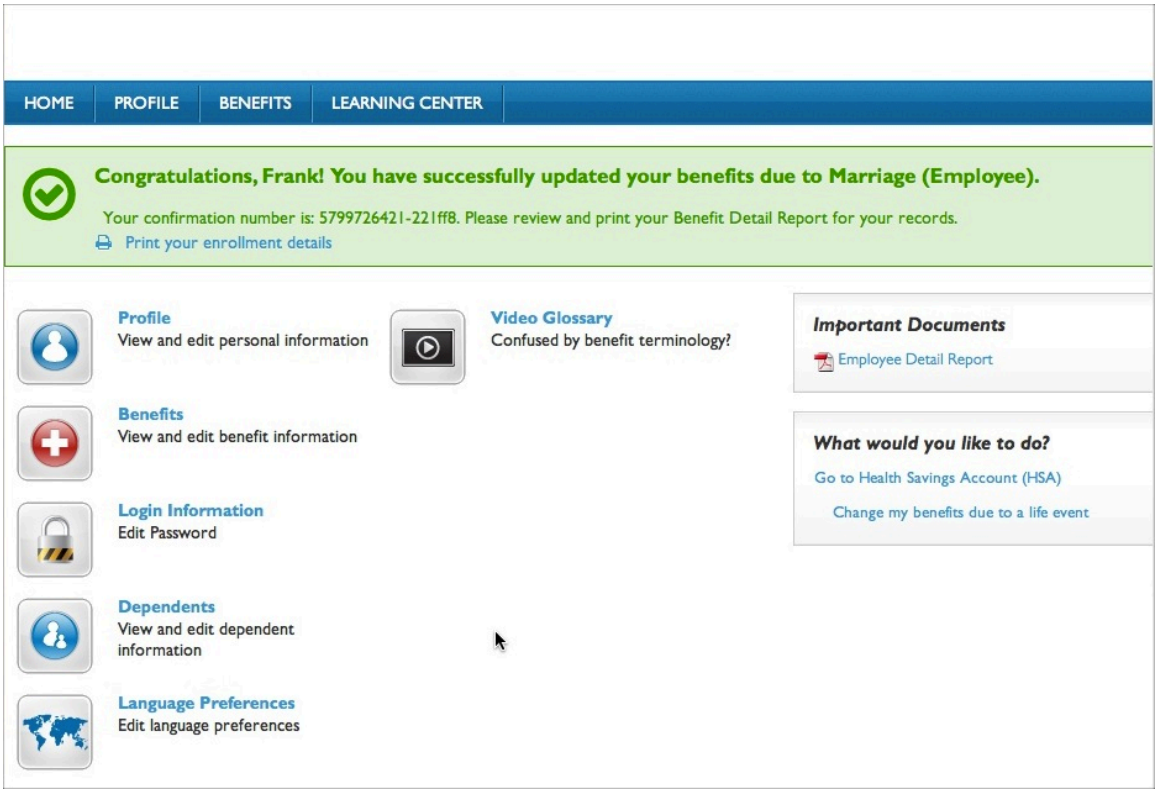


13. Select the *Persons Covered* link to review the newly-added spouse information.

14. Select *Save* on the Benefit Summary page when you have made all necessary changes and reviewed your benefit elections.

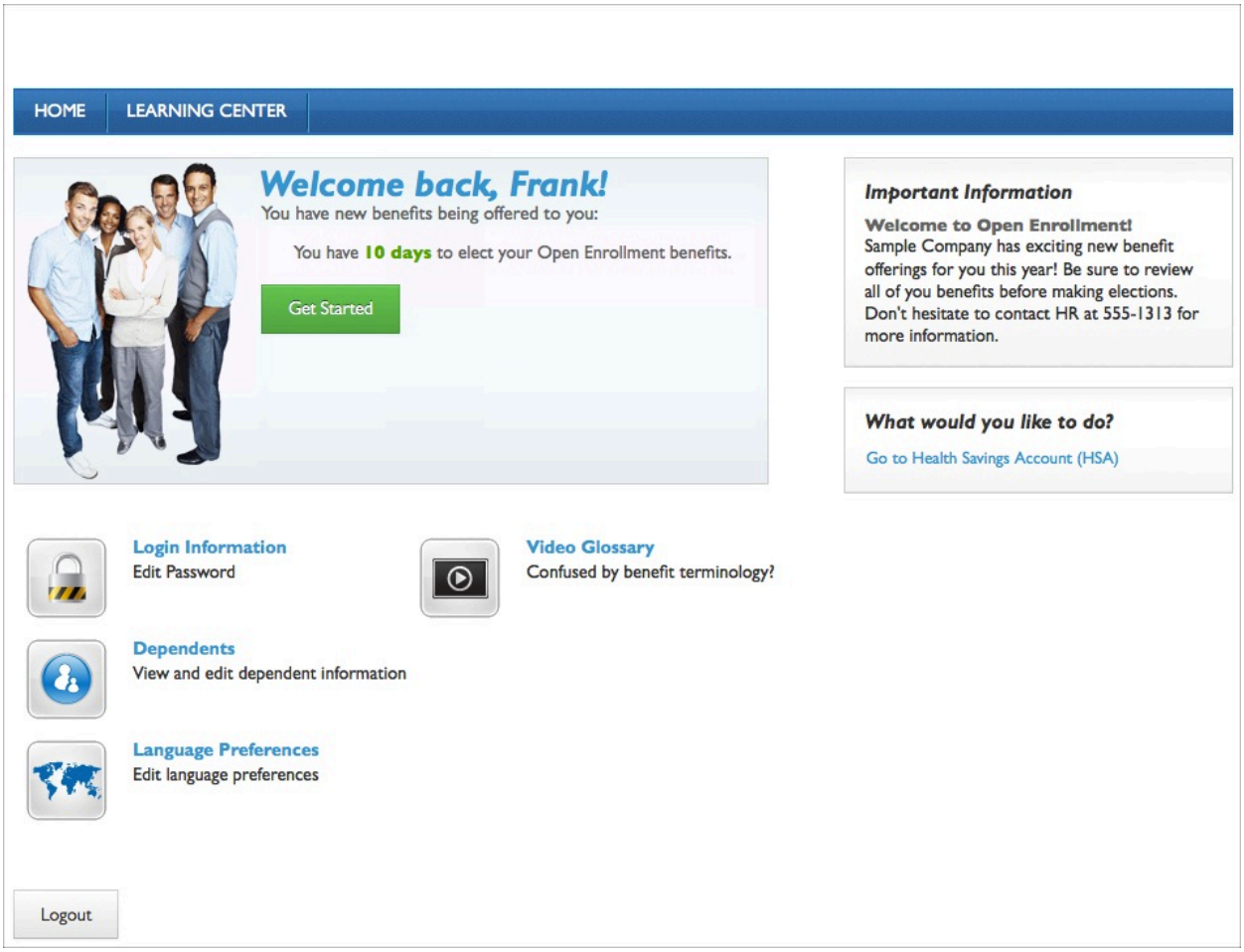
You are returned to the Home page, which shows the *Congratulations* message.

15. Print the *Employee Detail Report* for your records.



Making Open Enrollment Elections

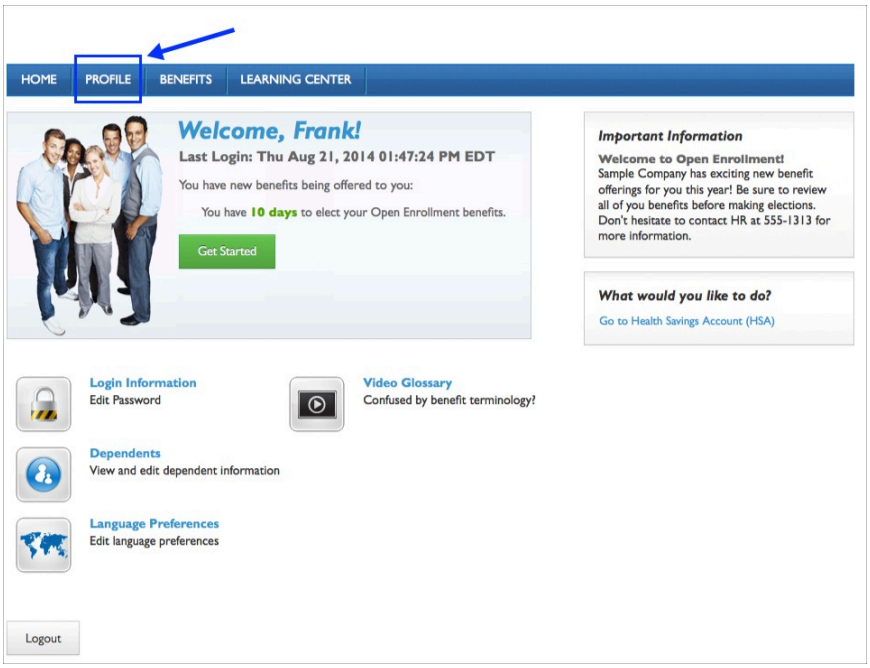
- Reviewing and Updating Your Personal Information
- Completing Your New Benefits



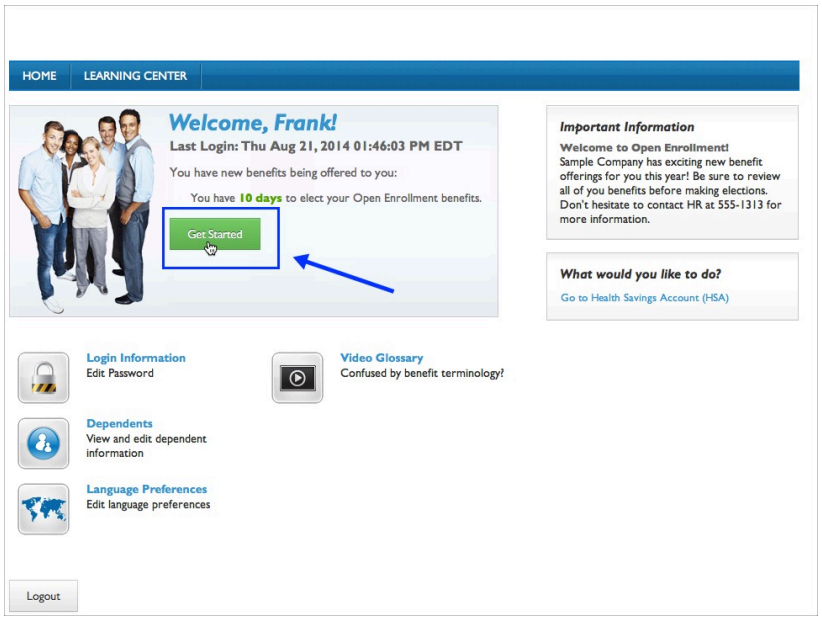
Reviewing and Updating Your Personal Information

Before you begin enrolling in your Open Enrollment benefits, you may review and update personal information in the system. *Note*: Depending on preferences established for your company, you may not be able to update demographic information.

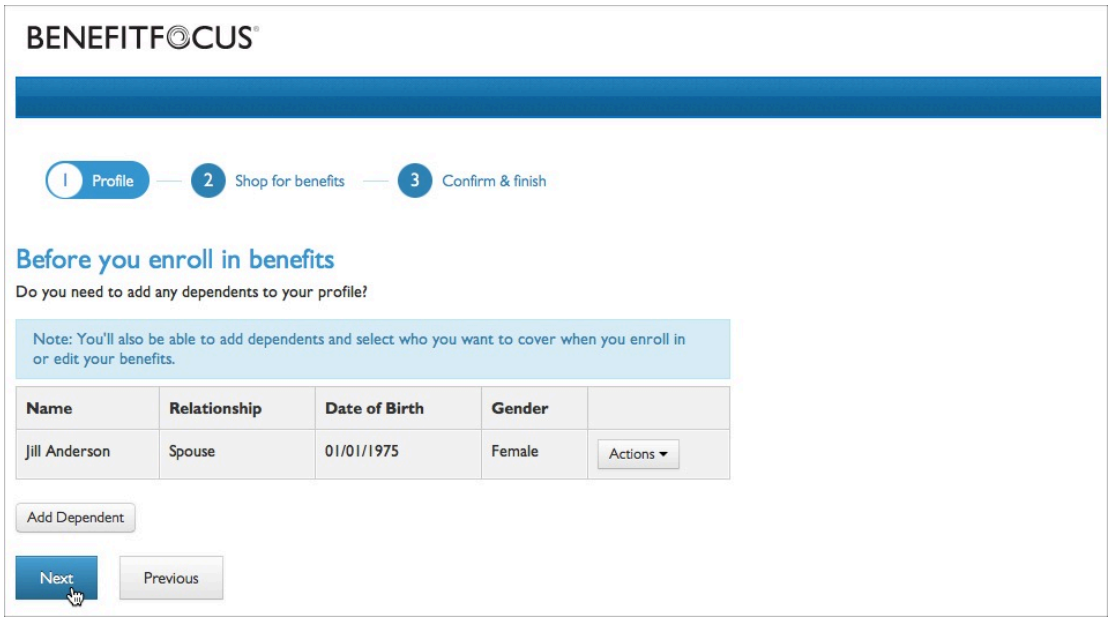
1. Select the *Profile* tab on the Home page. *Note*: if you do not see the *Profile* tab, continue with **Step 1.a.** Otherwise, go to **Step 2**.



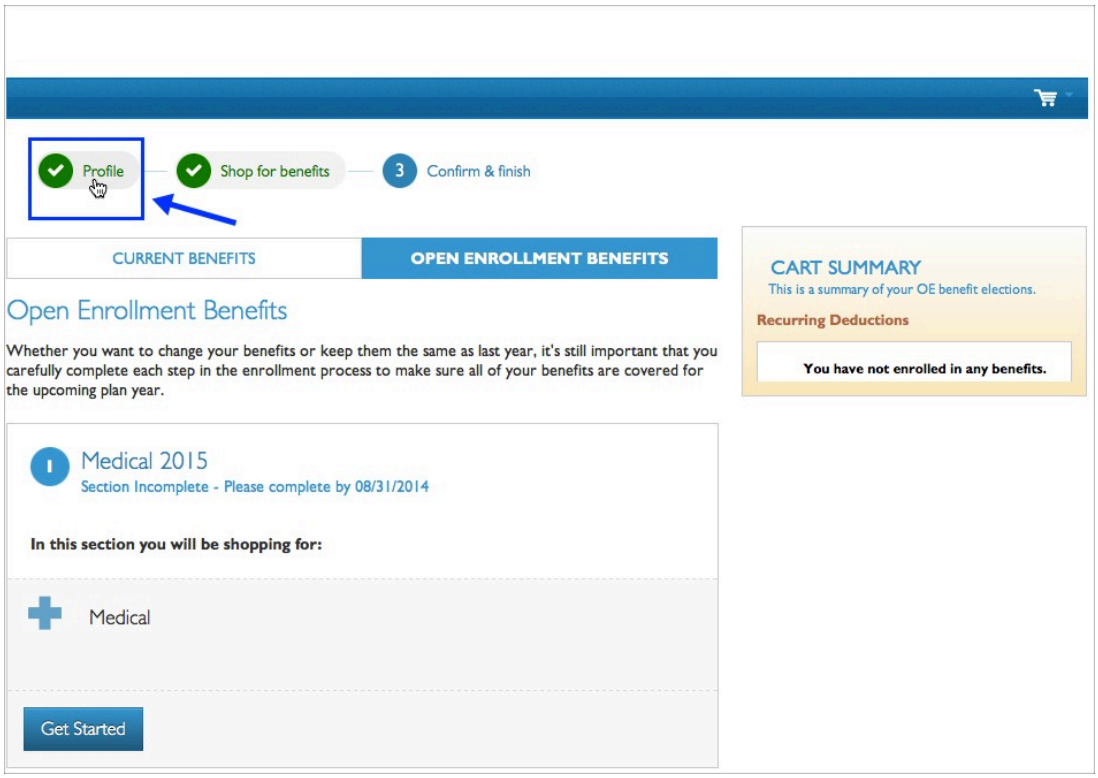
   a. Select the *Get Started* button if you do not see the *Profile* tab in the navigation bar.



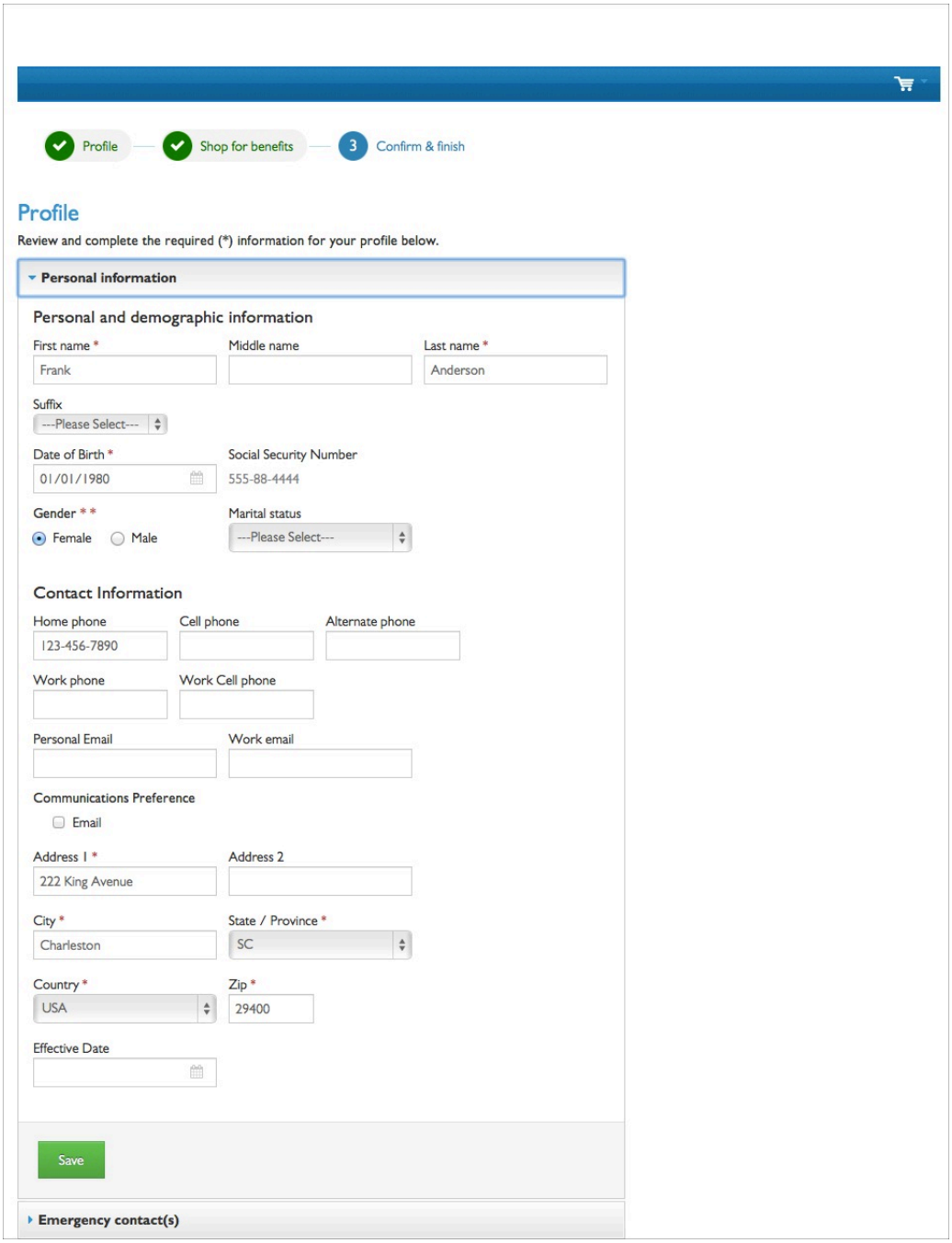
b. Review and update any dependent information; select *Next* to continue.



c. Select the *Profile* link.



2. Select the *Personal Information* link to expand the section and change your information.

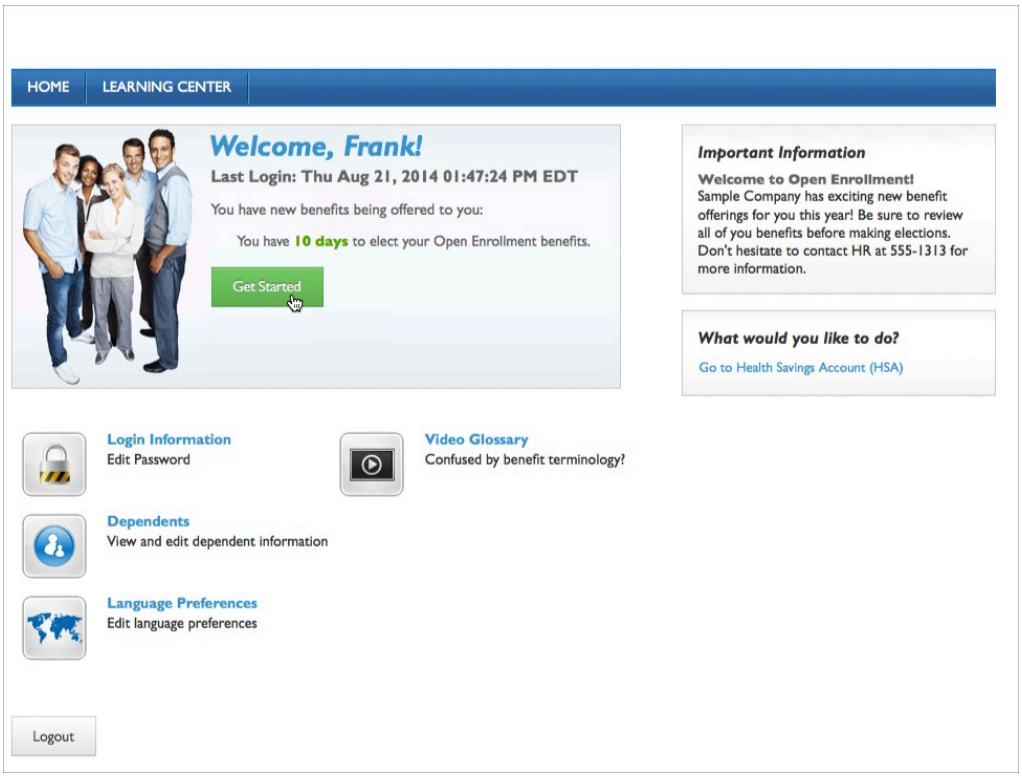


3. Select the *Save* button after updating your personal information.

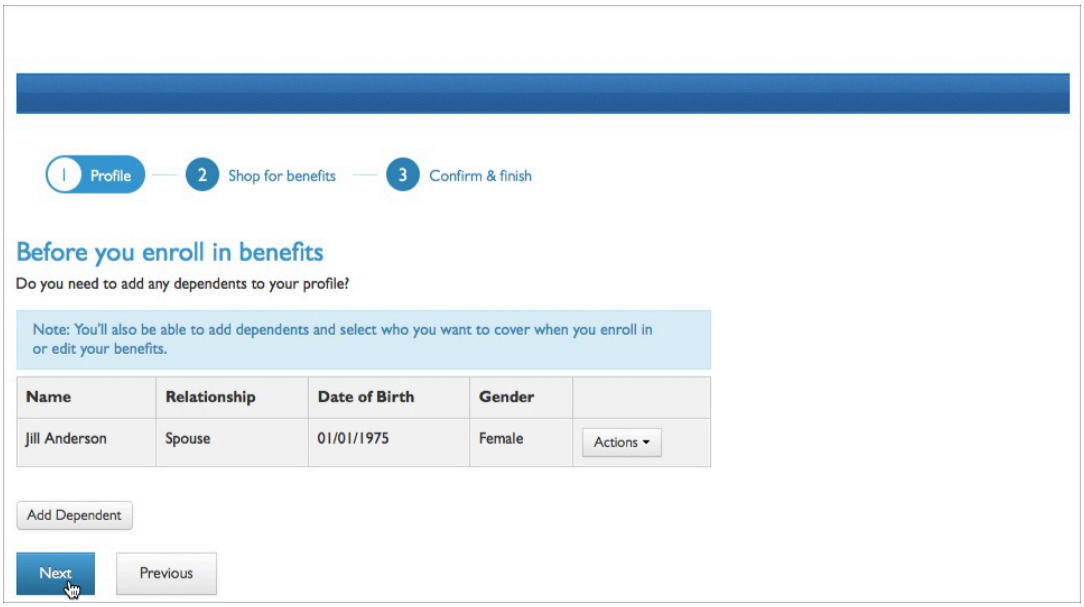
Completing Open Enrollment Benefits

The *Open Enrollment Benefits* section will display all new benefits you will be eligible for; complete, review, and save your benefits in the same manner as you did when making initial benefit elections.

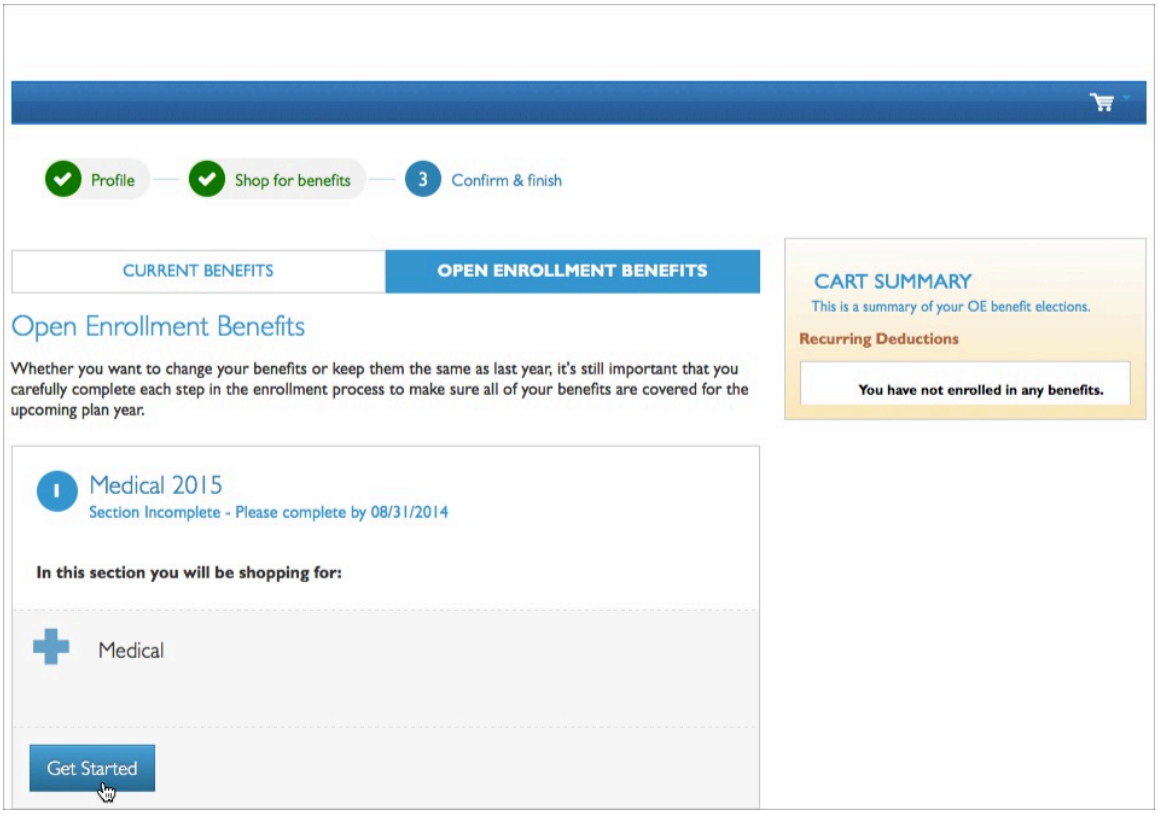
1. Select the *Get Started* button on the Home page.



2. Review the dependent information and select *Next*.



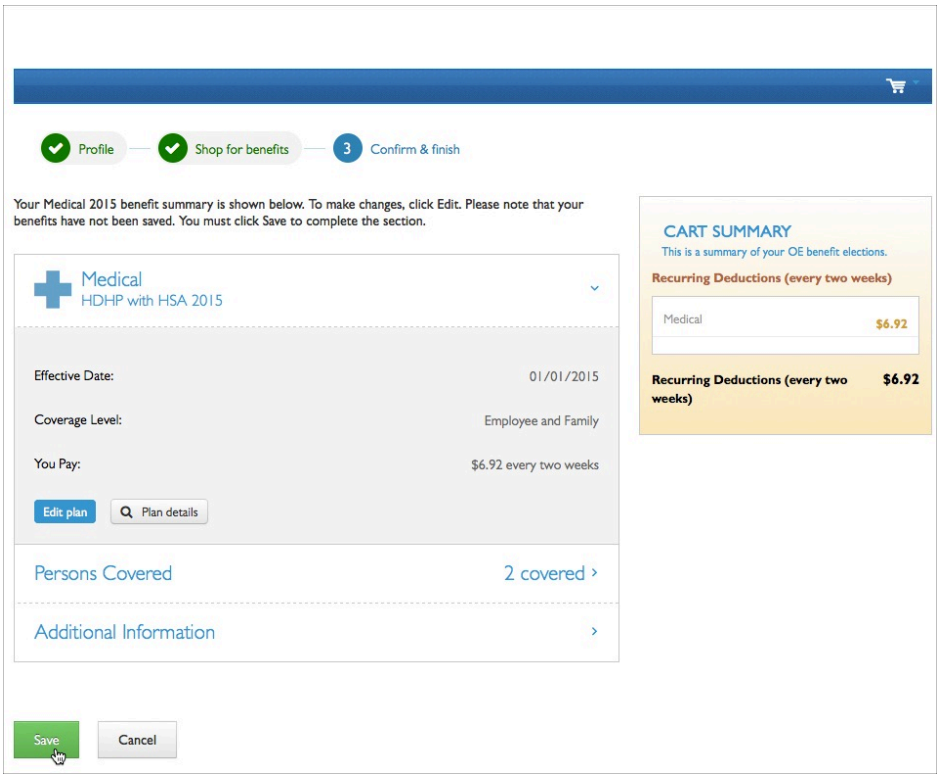
3. Select the *Open Enrollment Benefits* tab, and then select the *Start Section* button. The first of several enrollment pages will display for you to enter information.



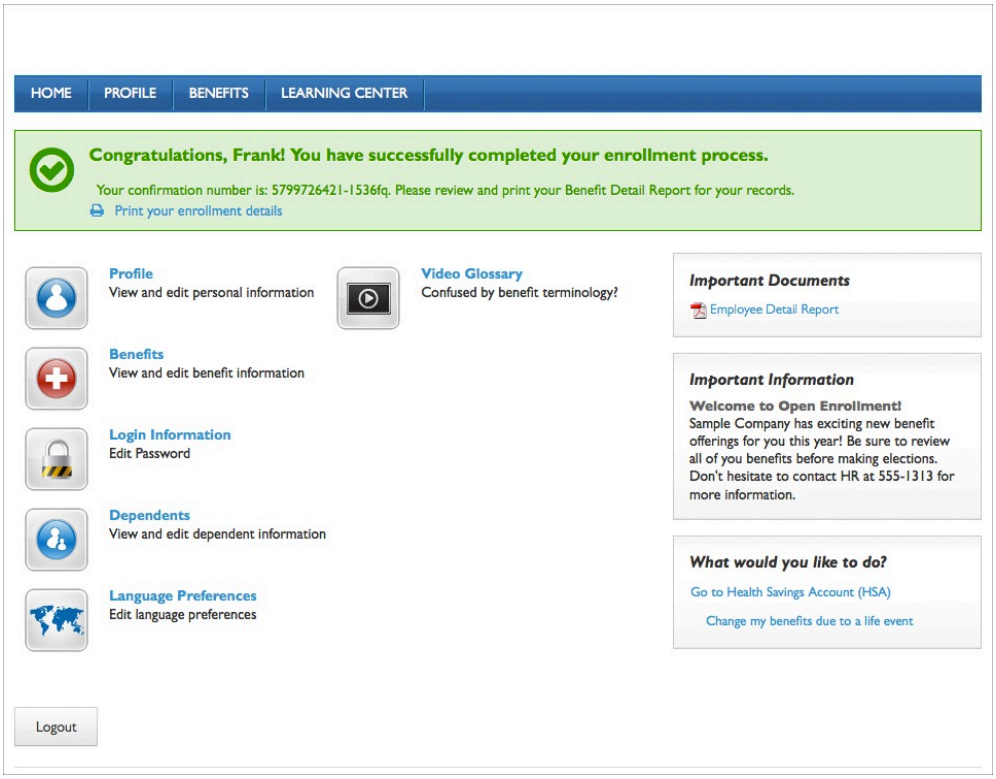
4. Proceed from page to page by selecting the *Next* button. When you have entered all required information, you will see a summary of your Open Enrollment benefits on the Benefit Summary page.

5. Review your information closely on the Benefit Summary page. You will have the option to *Edit* or *Save* the information. If you need to change any information, select the *Edit* button next to the corresponding section.

6. Select *Save* once you have made all necessary changes. You will be directed to the Home page.



7. Print the *Employee Detail Report* for your records.

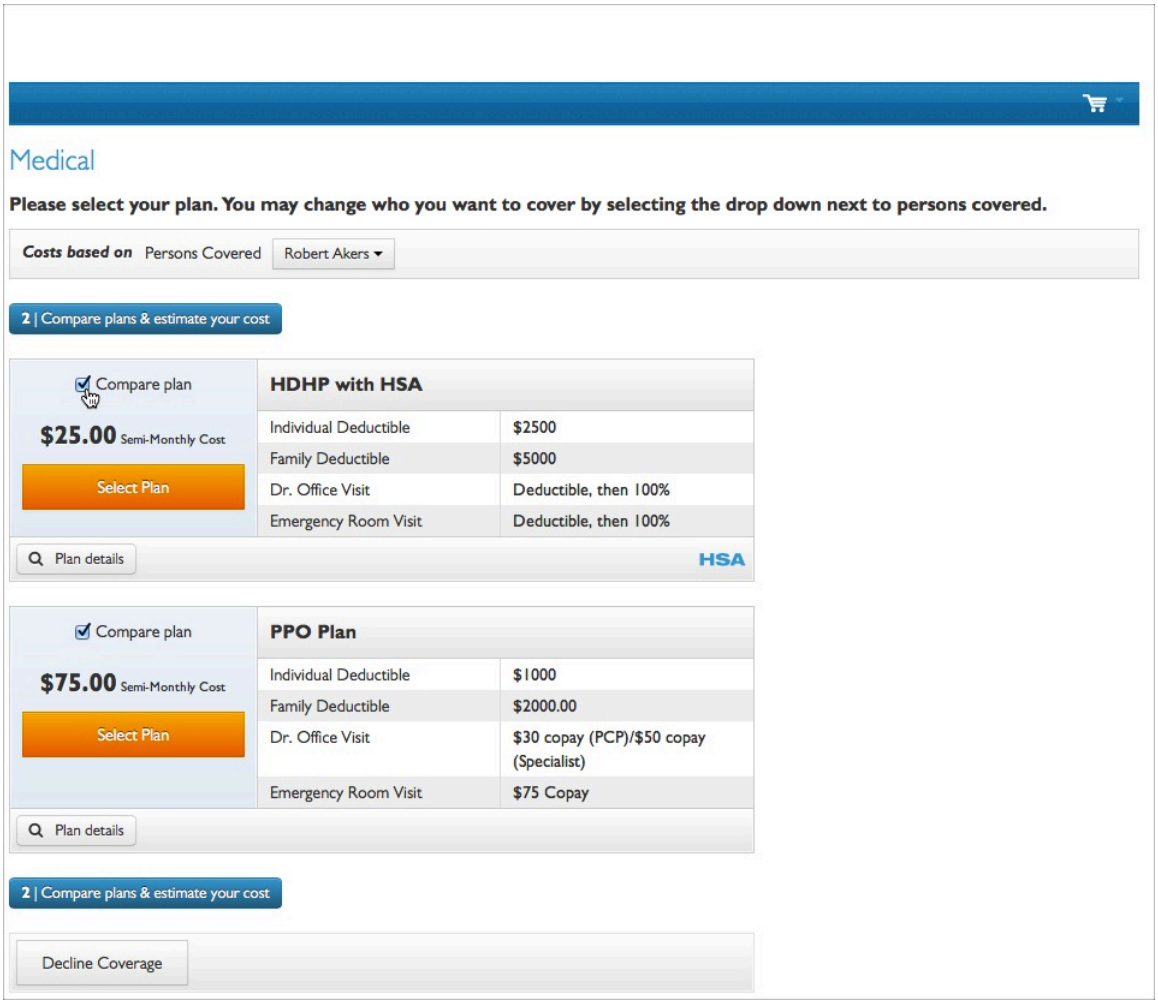


Plan Shopping App

The *Plan Shopping App* (PSA) helps you estimate potential out-of-pocket plan costs and display plan differences side-by-side. This tool provides an in-depth decision aid for benefit plan selection. It allows you to compare medical plans based on detailed coverage, healthcare usage, and cost information. The PSA makes it easy for you to calculate the estimated annual cost of your healthcare for each medical plan available to you. If the PSA is available for your employer, you access it from the *Plan Selection* page.

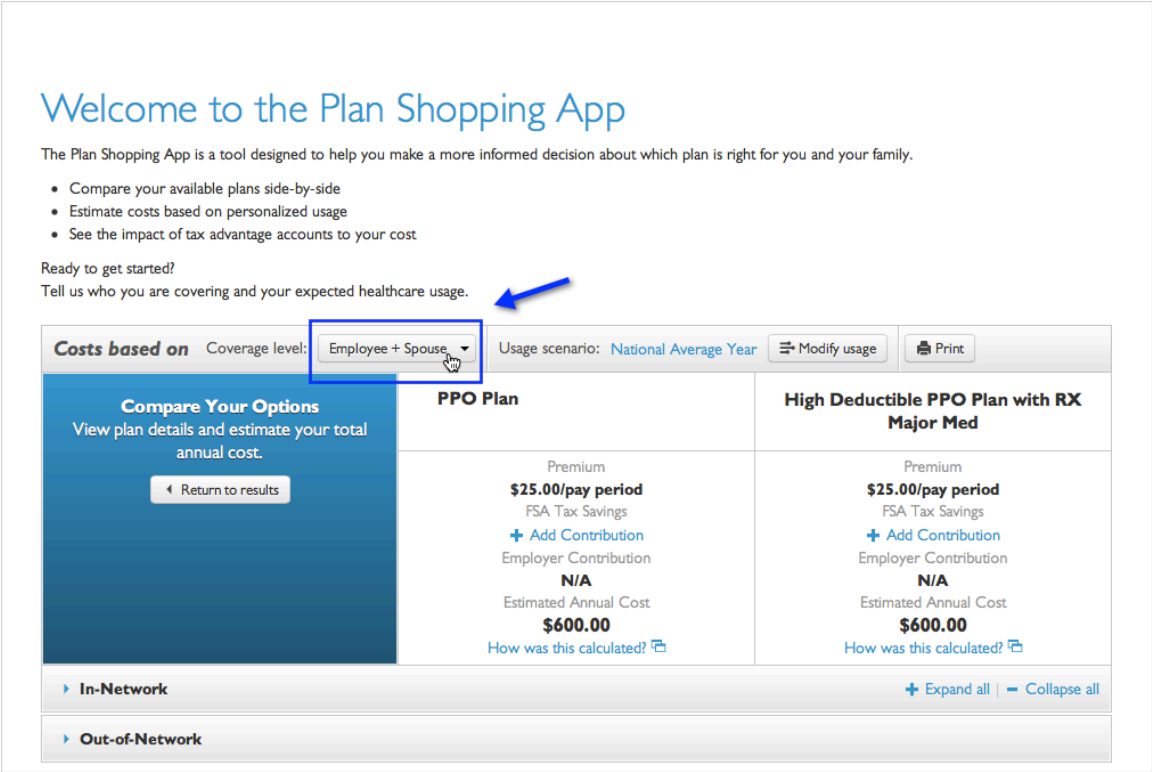
Comparing Medical Benefit Plans

1. Select the plans you want to compare from the *Plan Selection* page.

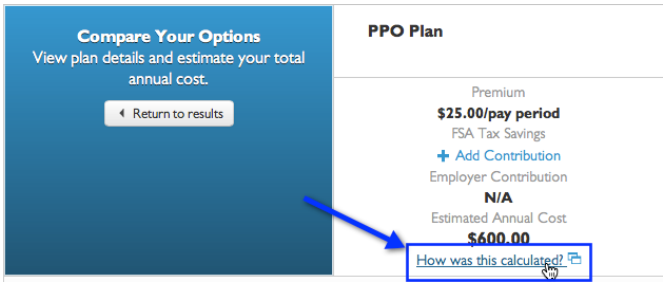


2. Select the *Compare plans & estimate your costs* button. The PSA tool opens.

3. Select the coverage level to determine plan costs for you and your dependents.



4. Select the *How was this calculated link* to learn more information about each plan.



5. Select the *How was this calculated link* to see the details of the costs of each plan.

How was your estimated total cost calculated?

The table below shows you a side-by-side comparison of what your options cover and how that impacts your wallet.

		$2,500 Deductible Plan with HSA		$2,500 Deductible Plan with HSA		$2,500 Deductible Plan with HSA	
	Amount	** Plan Pays	** You Pay	** Plan Pays	** You Pay	** Plan Pays	** You Pay
Estimated Healthcare Costs	$1,618.67	$-1,205.22	$2,823.89	$-1,205.22	$2,823.89	$-1,205.22	$2,823.89
Annual Plan Cost			$3,120.00		$3,060.00		$3,120.00
Tax Benefit			$0.00		$0.00		$0.00
Estimated Annual Cost			$5,943.89		$5,883.89		$5,943.89

Done

6. Select the *Modify Usage* button to change the default *National Average* amounts to personalize the estimated costs.

Welcome to the Plan Shopping App

The Plan Shopping App is a tool designed to help you make a more informed decision about which plan is right for you and your family.

- Compare your available plans side-by-side
- Estimate costs based on personalized usage
- See the impact of tax advantage accounts to your cost

Ready to get started?
Tell us who you are covering and your expected healthcare usage.

Costs based on Coverage level: Employee + Spouse | Usage scenario: National Average Year | Modify usage | Print

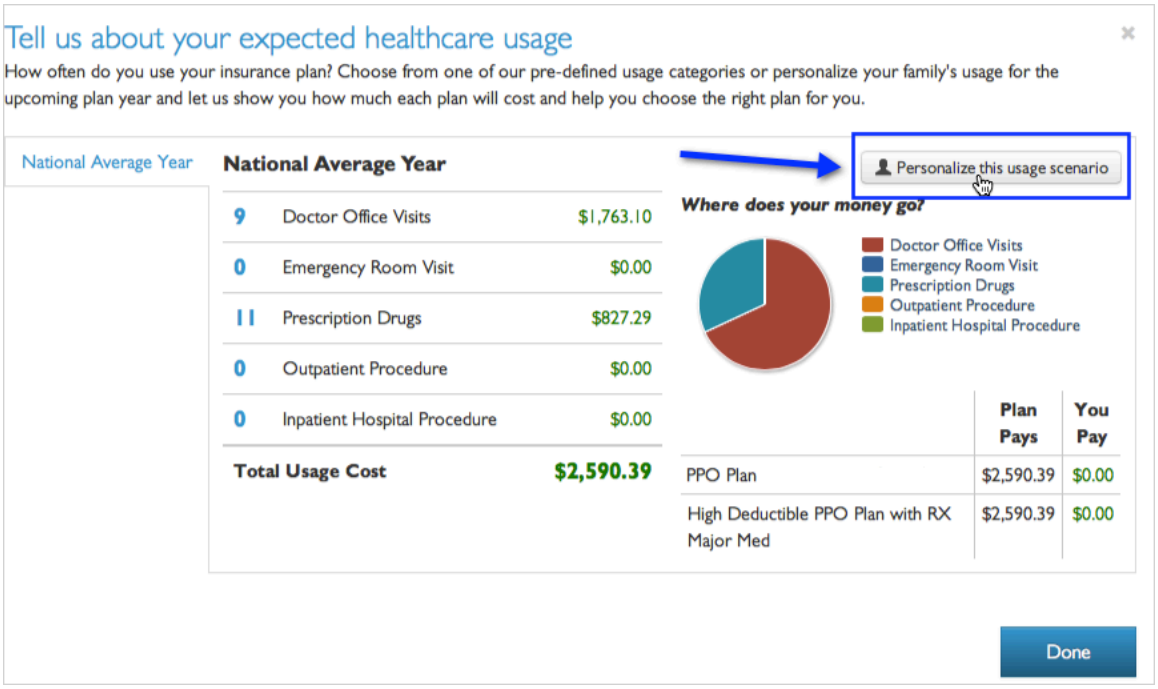
Compare Your Options
View plan details and estimate your total annual cost.
Return to results

PPO Plan	High Deductible PPO Plan with RX Major Med
Premium	Premium
$25.00/pay period	**$25.00/pay period**
FSA Tax Savings	FSA Tax Savings
+ Add Contribution	+ Add Contribution
Employer Contribution	Employer Contribution
N/A	**N/A**
Estimated Annual Cost	Estimated Annual Cost
$600.00	**$600.00**
How was this calculated?	How was this calculated?

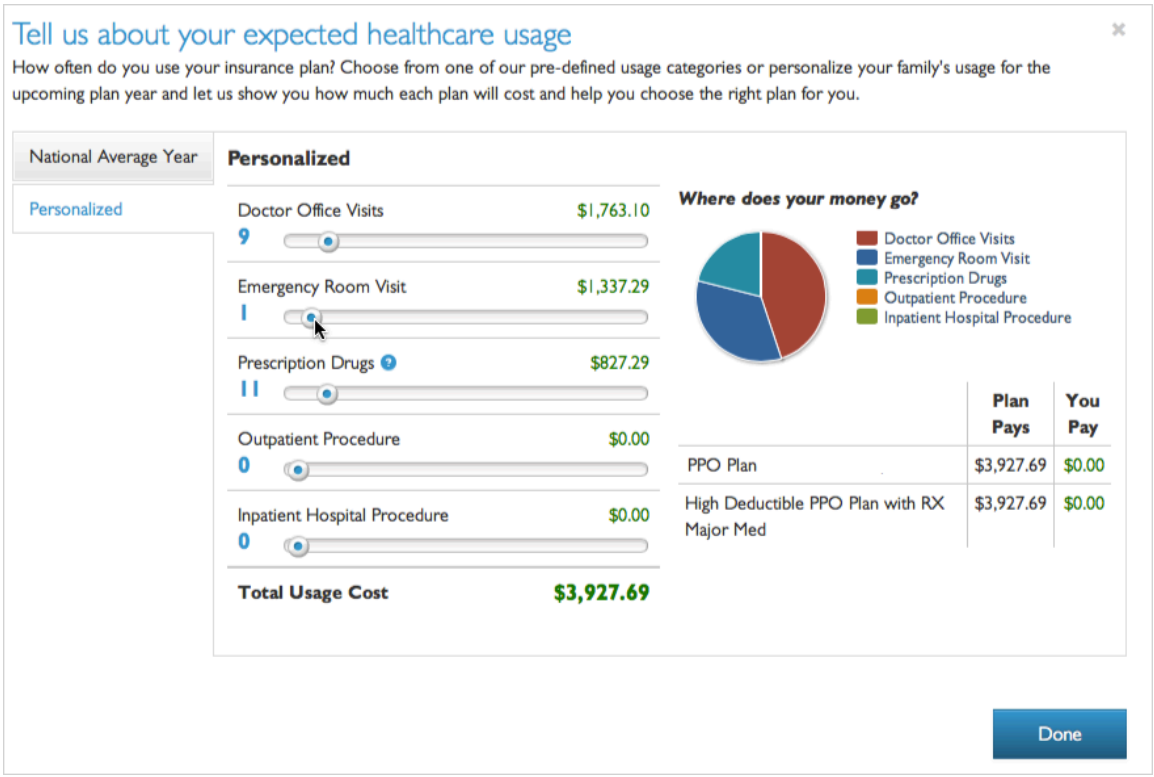
In-Network + Expand all | − Collapse all

Out-of-Network

7. Select the *Personalize this usage scenario* button to customize your healthcare usage.



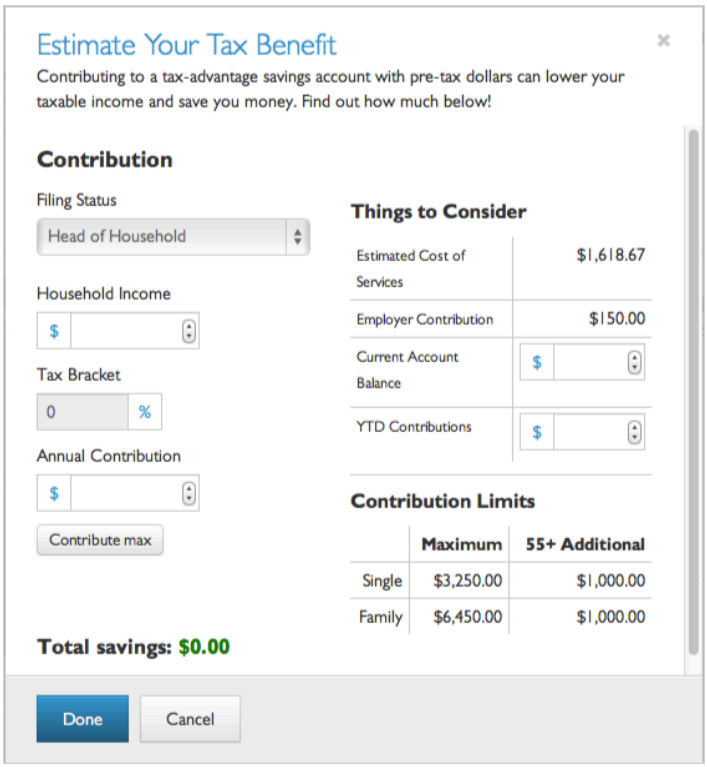
8. Adjust any of the national averages by sliding the numbers according to your estimated usage.



9. Select the *Done* button to return to the main PSA screen.

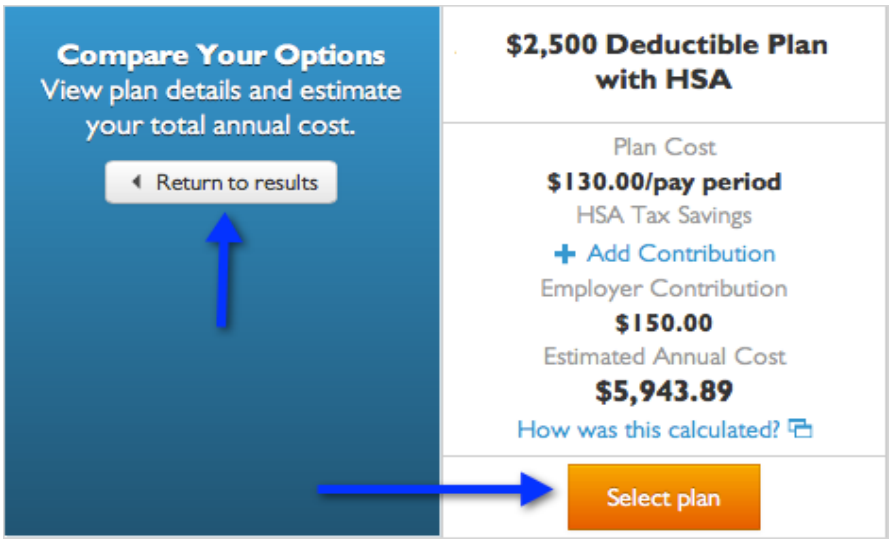
10. *(If available)* Select the *Add Contribution* button to estimate your tax savings for any plan. The *Estimate Your Tax Benefit* screen opens.

11. Enter the information in the *Estimate Your Tax Benefit* screen to determine your total tax savings.



12. Select *Done* to return to the main PSA screen.

13. Select the *Return to results* button to continue shopping for other benefit plans, or select the *Select Plan* button to choose that plan to enroll in; you may go back to choose other plans before you save your benefit election.



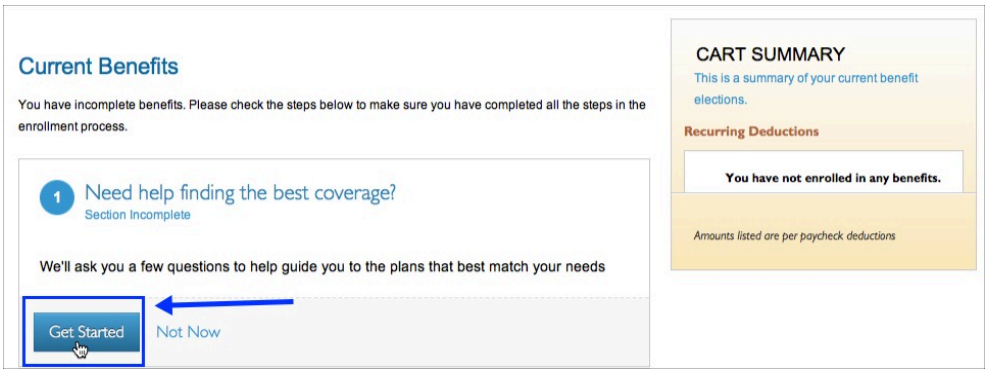
Guided Shopping

Before you select your benefit plans, you may be able to take advantage of a guided shopping process, which helps you determine the best benefit plan for you based on a few questions. On the Current Benefits page, you can choose answer questions to help you find the best plan for you, or you can skip the section to begin reviewing available benefit plans without answering any guided shopping questions.

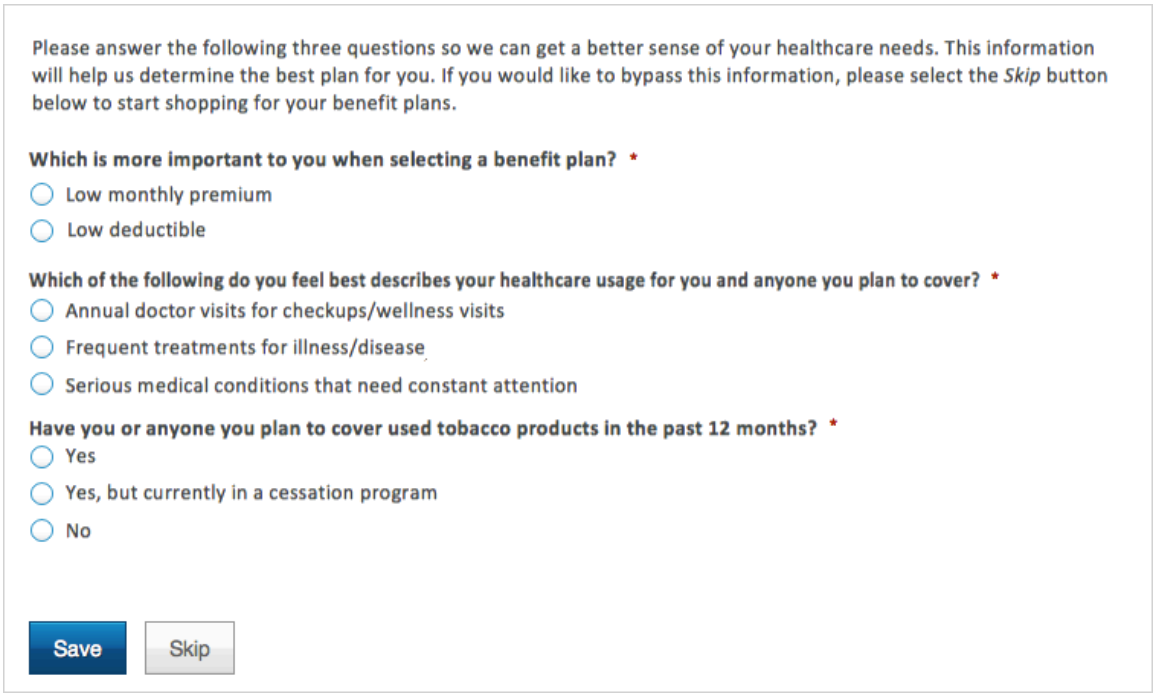
Note: This option may not be available for your employer.

To take advantage of the guided shopping process, follow these steps:

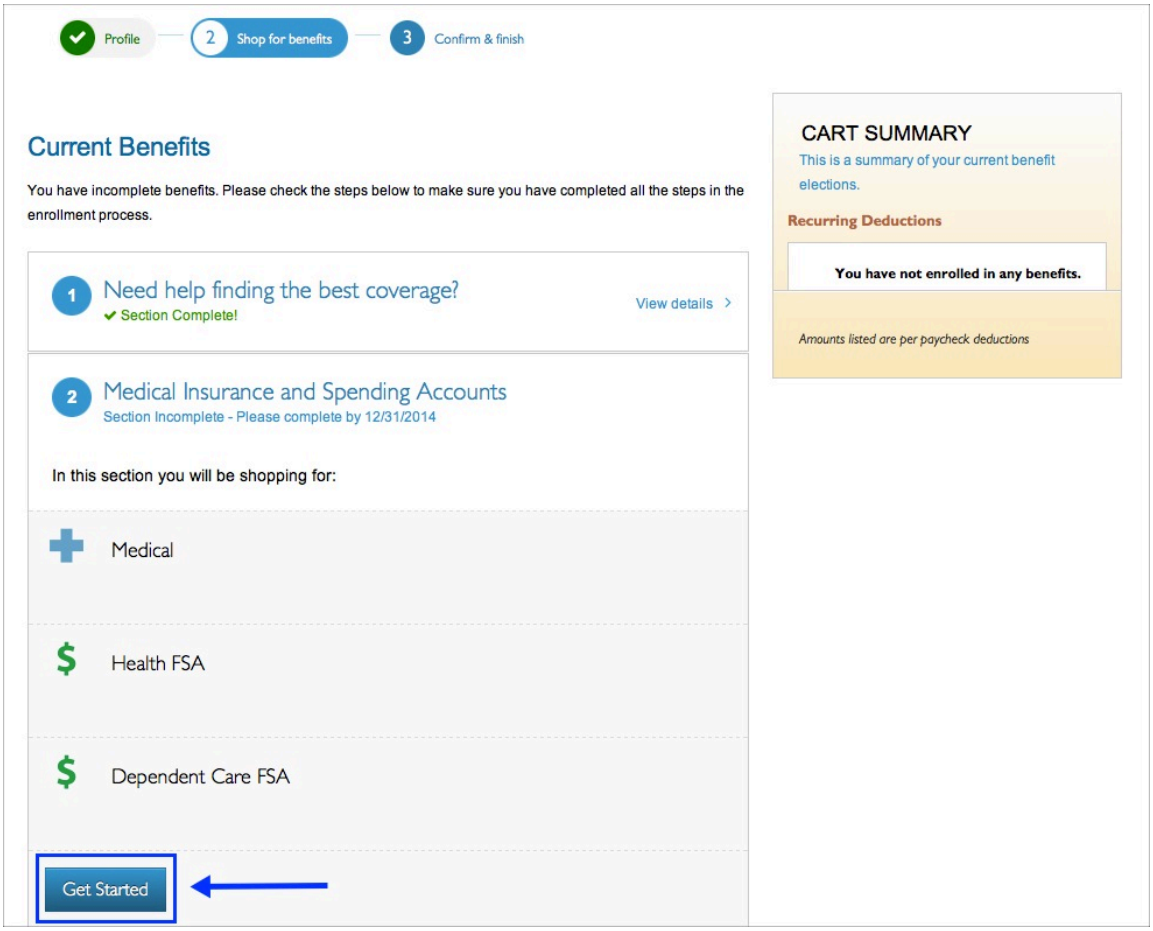
1. Select the *Get Started* button next to the *Need help finding the best coverage* section. If you prefer not to use this tool, you can select the *Not Now* link.



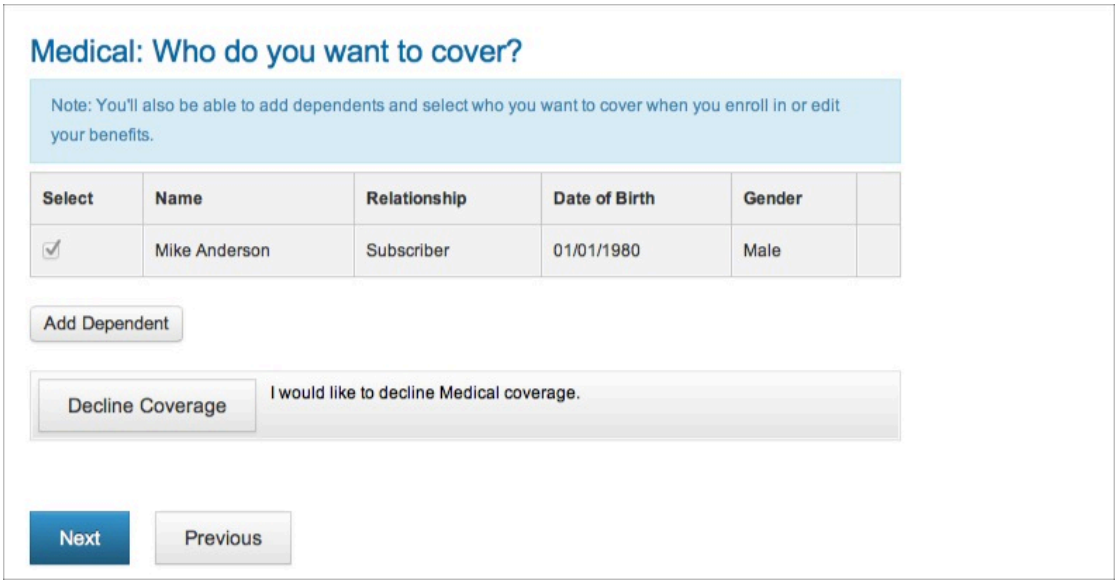
2. Answers the questions and select *Save*.



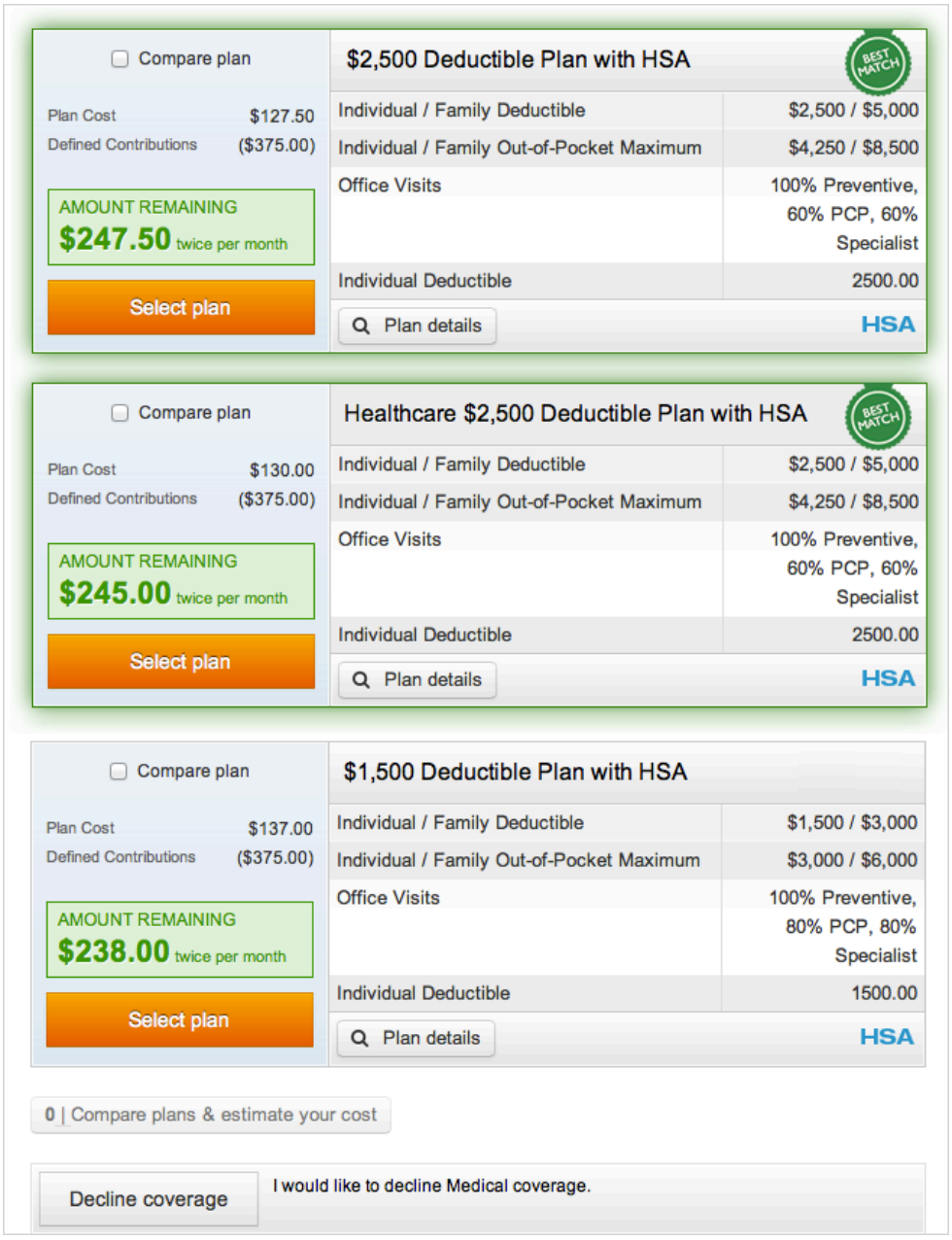
3. Select the *Get Started* button for benefits.



4. Enter dependent information or select *Next* to continue.

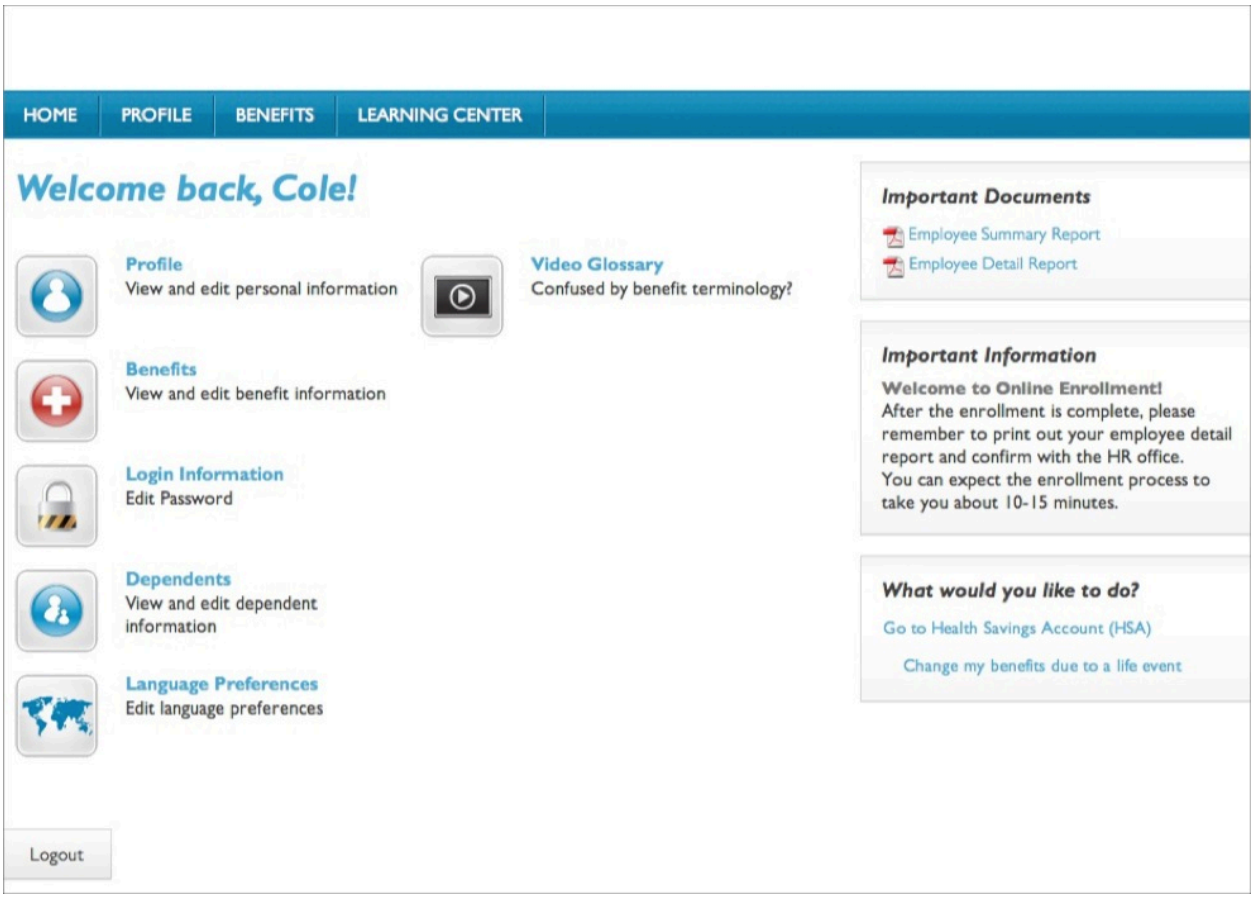


5. Review the benefit plans; notice the *Best Match* icon next to the plans that closely match your answers to the questions. You can select any benefit plan to continue.



Reports

- Printing Your Reports
- Printing the Employee Detail Report
- Printing the Employee Summary Report



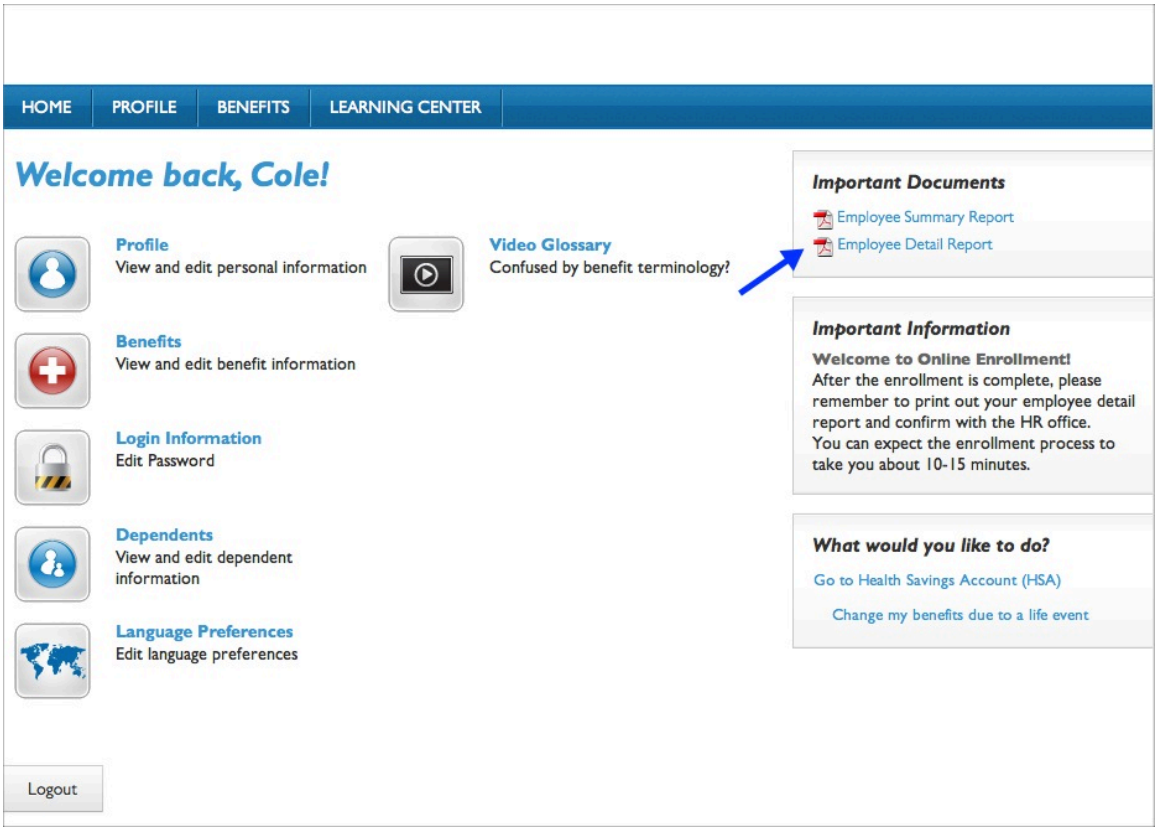
Printing Your Reports

From the Home page you can access your *Benefit Summary Report,* as well as your *Employee Detail Report*. You may print a copy of these reports for your records.

Note: Depending on rules established for your employer, you may not have access to some reports. Please contact your Benefits Administrator if you have questions.

Printing the Employee Detail Report

1. Select the *Employee Detail Report* link from the Home page.



2. Review the *Employee Detail Report.*

Sample Company printed on: 08/25/2014

Attention!

Your benefit changes are not final until they have been approved by your Benefits Coordinator.

Cole Adkinson 400 Bark Street, Charleston, SC 29492

SSN	Date of birth	Name/Address effective date	Gender
999-88-9009	01/16/1985	06/27/2013	Male

Earnings amount	Earnings amount effective date	Date of hire
$95,000.00 per year	06/01/2013	06/01/2013

Status: Active
Location: Charleston

Medical CURRENT

Sample Carrier

Plan name: HDHP with HSA
Coverage level: Employee Only

Person(s) covered	Relationship	Date of birth	Effective date	End date
Cole Adkinson	SUBSCRIBER	01/16/1985	05/02/2014	

Health Savings Account (HSA) CURRENT

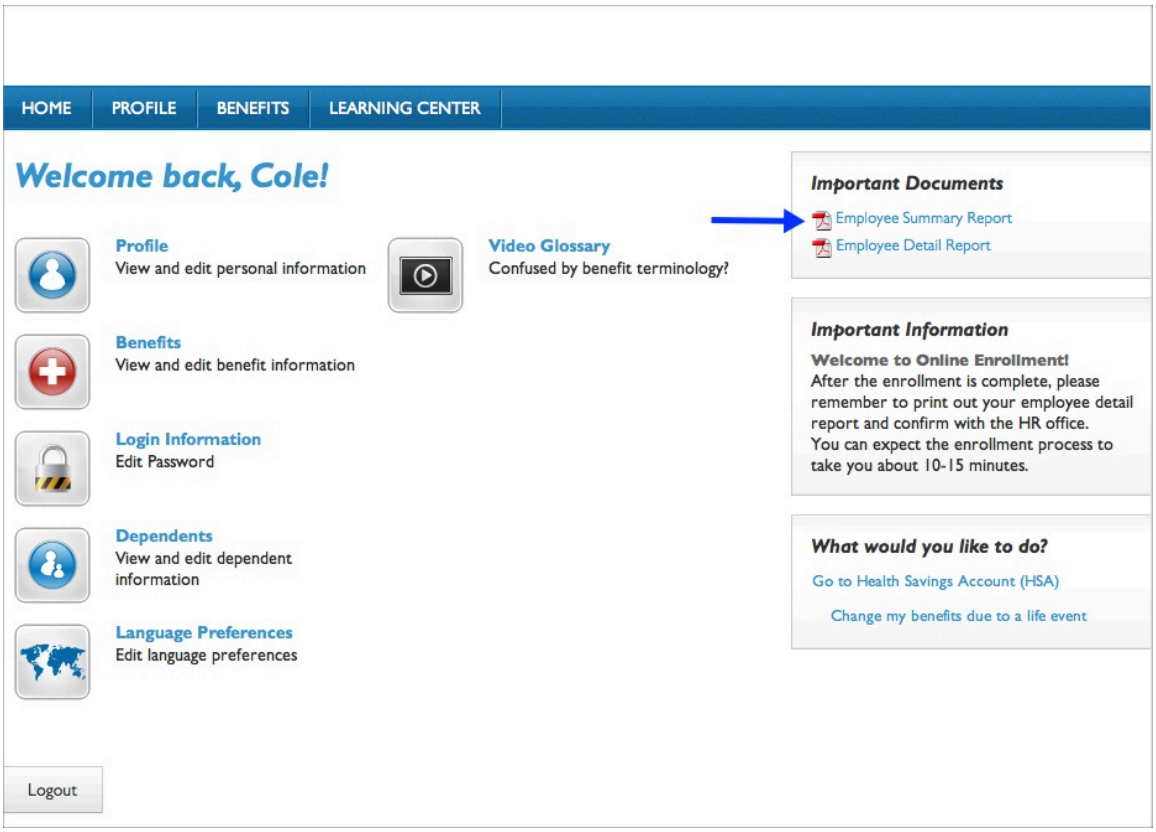
Sample Carrier

Plan name: HSA

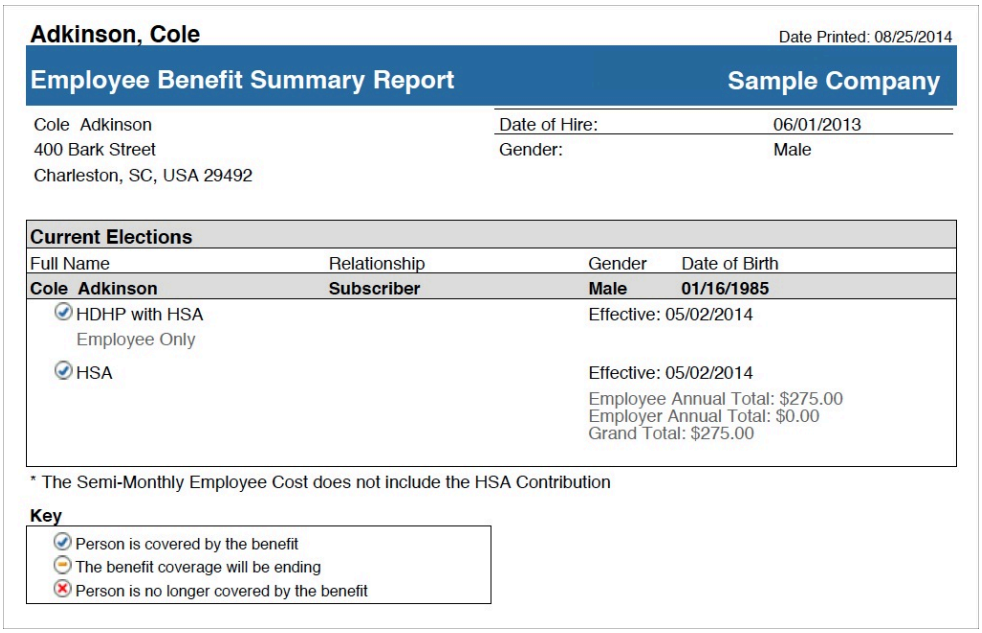
Start date	End date	Frequency	Employee per-check/total	Employer per-check/total
05/15/2014	10/31/2014	Ongoing per pay period contribution	$25.00	
			Employee annual total: $275.00	**Employer annual total: $0.00**

Printing the Employee Summary Report

1. Select the *Employee Summary Report* from the Home page.



3. Review the *Employee Summary Report*.



Adkinson, Cole Date Printed: 08/25/2014

Employee Benefit Summary Report **Sample Company**

Cole Adkinson
400 Bark Street
Charleston, SC, USA 29492

Date of Hire:	06/01/2013
Gender:	Male

Current Elections

Full Name	Relationship	Gender	Date of Birth
Cole Adkinson	**Subscriber**	**Male**	**01/16/1985**
HDHP with HSA Employee Only		Effective: 05/02/2014	
HSA		Effective: 05/02/2014 Employee Annual Total: $275.00 Employer Annual Total: $0.00 Grand Total: $275.00	

* The Semi-Monthly Employee Cost does not include the HSA Contribution

Key

- Person is covered by the benefit
- The benefit coverage will be ending
- Person is no longer covered by the benefit

Frequently Asked Questions

Q: How do I change the information entered by my Benefits Administrator?

A: Select the corresponding *Edit* button on the Benefit Summary page. Make changes as you proceed through each page.

Q: If my information has a check mark beside it, do I need to do anything?

A: You can review the required information that you or your Benefits Administrator submitted and add any optional information that is incomplete.

Q: My Social Security Number is wrong. How do I change it?

A: If your Social Security Number is wrong, inform your Benefits Administrator to have it corrected.

Q: How much will my benefits cost me?

A: Your benefit costs will display throughout the enrollment process. You can review your *Shopping Cart* to see your costs, and you can review detailed information on the Benefit Summary page before you save your benefits. If the cost of your benefits is not displayed in the enrollment process, contact your Benefits Administrator.

Q: How do I change information I entered during online enrollment?

A: Select *Edit* on the Benefit Summary page for the item you want to change. You are guided through the enrollment process until you have finished making your selections, and then you are returned to the *Summary* page.

Q: When will my benefits become effective?

A: An effective date for each of your benefits displays on the Benefit Summary page. If you have questions about when your benefits begin, please contact your Benefits Administrator.

Q: I entered information incorrectly for one of my dependents. How do I correct their information?

A: From the Home page, select the *Dependents* icon, and then select *Edit* under the *Actions* button for the dependent. Make necessary changes and select *Save*. Select the *Next* to return to the appropriate place in the workflow.