



Oracle Benefits Self-Service Guide

Contents

How to Access Oracle Benefits Self-Service:	2
View Your Benefit Enrollments and Covered Dependents:	2
Make an Open Enrollment Election:	3
Change Your Plan or Update Your Dependents:	5
Change Your Medical/Dental Plan:	6
Add or Delete Dependents from Your Plan:.....	7
Create a New Dependent:.....	7
Enroll in Medical Flex Cash or Dental Flex Cash:.....	10
Enroll in a Flex Spending Plan for Health Care (HCRA) or Dependent Care (DCRA):	14
Submit Your Final Elections:.....	18

For your awareness, the plan names and monthly premiums shown are historical. Please reference the Human Resources Open Enrollment page for current plans and costs.

<https://afd.calpoly.edu/hr/benefits/open-enrollment>



Oracle Benefits Self-Service Guide

How to Access Oracle Benefits Self-Service:

Log into the Cal Poly portal: <https://my.calpoly.edu/> (If you need to reset your password, contact the ITS Service Desk at 756-7000 for assistance.)

Select the Personal Info Tab, and you will see My Benefits in the Employee Info Section. (If there is no My Benefits Info, Select Add Tab, Column: Employee, My Benefits Info. Then Add to My Page.)

Select "View" to the right of "My Benefits."

The screenshot shows the 'My Cal Poly Portal' interface. The 'Personal Info' tab is selected in the top navigation bar. On the left, there is a 'Single Click Links' sidebar. The main content area is divided into two columns. The left column, titled 'Employee Info', contains sections for 'My Pay and Leave Usage', 'My Benefits', and 'My Job Info'. The 'My Benefits' section has a 'View' link highlighted with a red box. The right column, titled 'Personal Info', contains sections for 'Cal Poly Password' and 'My Info'.

View Your Benefit Enrollments and Covered Dependents:

Select "Benefits Enrollment."


The screenshot shows the 'My Benefits' section. It includes a 'Benefits Summary and Enrollment' link with a 'View' button. Below this, there is a 'Benefits Summary' section with a 'Benefits Summary' link. The 'Benefits Enrollment' section contains a 'Benefits Enrollment' link highlighted with a red box.



Make an Open Enrollment Election:

Select “Enroll in Benefits” in your Benefits Summary (above).

To begin, click the Select button.

Home

Favorites | Main Menu > Self Service > Benefits > Benefits Enrollment


[New Window](#)

Benefits Enrollment

Welcome to the annual open enrollment period. Open Enrollment is your annual opportunity to review benefit options and modify elections to meet changing needs. The Open Enrollment Period for Cal Poly State employees is September to October

Through PeopleSoft eBenefits, you may submit open enrollment elections for plans for which you are eligible. You will have access to this benefits enrollment site throughout the open enrollment period. You may make changes anytime during that period until you submit your elections. However, if you wish to change your elections after submitting them, you must contact the Benefits Office at (805) 756-5436.

To begin, click **Select**.

Open Benefit Events				
Event Description		Event Date	Event Status	Job Code Title
Open Enrollment		01/01/000	Open	Admin Analyst/Spclst 12 Mo

Select

Once you click Select, it will take a few seconds for your benefits enrollment information to load.

For questions regarding your benefit information please contact the Benefits Office at (805) 756-5436 or you can visit the [Cal Poly Benefits website](#).



Oracle Benefits Self-Service Guide

Review your Enrollment Summary.

Current: you will see the plans you have now.

New: you will see the plan you will have beginning January 1, 2022. This new plan will change if you make an Open Enrollment change.

ORACLE

Home

Favorites | Main Menu > Self Service > Benefits > Benefits Enrollment

[New Window](#)

Benefits Enrollment

Open Enrollment

During open enrollment, you can review your medical, dental, FlexCash, HCRA and DCRA options and add, drop or change benefits coverage for yourself and your dependents. Detailed instructions are outlined in the eBenefits Step by Step Guide, which is available on the Cal Poly Benefits website.

Important: Your enrollment will not be processed until you submit your elections.


Enrollment Summary

Edit	Medical	Before Tax	After Tax
	Current: Blue Shield NetValue Advantage:Empl+Deps		
	New: Blue Shield NetValue Advantage:Empl+Deps		
Edit	Dental	Before Tax	After Tax
	Current: Delta Enhanced II:Empl+Deps		
	New: Delta Enhanced II:Empl+Deps		
Edit	Vision	Before Tax	After Tax
	Current: Vision Service Plan:Emp+Deps		
	New: Vision Service Plan:Emp+Deps		
Edit	Dental Flex Cash	Before Tax	After Tax
	Current: No Coverage		
	New: No Coverage		
Edit	Medical Flex Cash	Before Tax	After Tax
	Current: No Coverage		
	New: No Coverage		
	Life and AD&D	Before Tax	After Tax
	Current: Standard (10K / CSUEU): \$10,000		
	New: Standard (10K / CSUEU): \$10,000		
Edit	Flex Spending Health Care	Before Tax	
	Current: No Coverage		
	New: No Coverage		
Edit	Flex Spending Dependent Care	Before Tax	
	Current: No Coverage		
	New: No Coverage		



Change Your Plan or Update Your Dependents:

Select the “Edit” button next to each benefit you are interested in updating.



Home

FavoritesMain Menu > Self Service > Benefits > Benefits Enrollment

New Window

Benefits Enrollment

Open Enrollment

During open enrollment, you can review your medical, dental, FlexCash, HCRA and DCRA options and add, drop or change benefits coverage for yourself and your dependents. Detailed instructions are outlined in the eBenefits Step by Step Guide, which is available on the Cal Poly Benefits website.

Important: Your enrollment will not be processed until you submit your elections.

Enrollment Summary

Edit	Medical	Before Tax	After Tax
Current: Blue Shield NetValue Advantage:Empl+Deps			
New: Blue Shield NetValue Advantage:Empl+Deps			
Edit	Dental	Before Tax	After Tax
Current: Delta Enhanced II:Empl+Deps			
New: Delta Enhanced II:Empl+Deps			
Edit	Vision	Before Tax	After Tax
Current: Vision Service Plan:Emp+Deps			
New: Vision Service Plan:Emp+Deps			
Edit	Dental Flex Cash	Before Tax	After Tax
Current: No Coverage			
New: No Coverage			
Edit	Medical Flex Cash	Before Tax	After Tax
Current: No Coverage			
New: No Coverage			
Life and AD&D			
Before Tax			
After Tax			
Current: Standard (10K / CSUEU): \$10,000			
New: Standard (10K / CSUEU): \$10,000			
Edit	Flex Spending Health Care	Before Tax	
Current: No Coverage			
New: No Coverage			
Edit	Flex Spending Dependent Care	Before Tax	
Current: No Coverage			
New: No Coverage			



Oracle Benefits Self-Service Guide

Change Your Medical/Dental Plan:

Select the Edit button next to the plan. The radio button will indicate your current plan (if any). Select the radio button next to the option of your choice.

ORACLE

Home

FavoritesMain Menu > Self Service > Benefits > Benefits Enrollment

New Window

Benefits Enrollment

Medical

You have a choice of Health Maintenance Organizations (HMOs) or Preferred Plan Provider (PPO) insurance plans through the California Public Employees Retirement System (CalPERS). You may enroll in a health plan that services either your residential or work area. You and the CSU share the cost of coverage with the CSU paying the greater portion of the monthly premium.

While the CSU provides a variety of health plans, only you can decide which is best for you and your family. Employees can go to CalPERS and use the [Health Plan Chooser](#) to obtain information on the health plans, costs, doctors and member ratings.

i Important! Your current coverage is: Blue Shield NetValue Advantage with Employee + 2 or more coverage. You will continue with this coverage unless you elect to make a change.

Select an Option

Here are your available options with your monthly costs:

[Premiums](#)

Select one of the following plans:

☐ [PERS Care PPO](#)

Coverage Level	Your Costs	Tax Class
Employee Only	\$0.00	Before-Tax
Employee + 1	\$0.00	Before-Tax
Employee + 2 or more	\$0.00	Before-Tax

☐ [PERS Choice PPO](#)

Coverage Level	Your Costs	Tax Class
Employee Only	\$0.00	Before-Tax
Employee + 1	\$0.00	Before-Tax
Employee + 2 or more	\$0.00	Before-Tax

☐ [PERS SELECT](#)

Coverage Level	Your Costs	Tax Class
Employee Only	\$0.00	Before-Tax
Employee + 1	\$0.00	Before-Tax
Employee + 2 or more	\$0.00	Before-Tax

☐ [Blue Shield HMO ADVANTAGE](#)

Coverage Level	Your Costs	Tax Class
Employee Only	\$0.00	Before-Tax
Employee + 1	\$0.00	Before-Tax
Employee + 2 or more	\$0.00	Before-Tax

☒ [Blue Shield NetValue Advantage](#)

Coverage Level	Your Costs	Tax Class
Employee Only	\$0.00	Before-Tax
Employee + 1	\$0.00	Before-Tax
Employee + 2 or more	\$0.00	Before-Tax

☐ [Waive](#)

NOTE: If you choose an HMO, contact the insurance provider to select a Primary Care Physician (PCP) for yourself and your dependents. If you do not, the insurance company will assign PCP's.



Oracle Benefits Self-Service Guide

Add or Delete Dependents from Your Plan:

Scroll to the bottom of the plan enrollment page. Review the names in this table. To enroll one of these dependents that is not currently checked, check the enroll box next to that dependent's name. To delete one of these dependents, uncheck the enroll box next to their name.

Enroll Your Dependents

The list below displays all individuals who are eligible to be your dependents. You may use the Add/Review Dependents button to add new dependents to your list. To enroll a dependent on to your medical coverage, check the Enroll box next to the dependent's name. To delete a dependent from your medical coverage, uncheck the Enroll box next to the dependent's name.

Click [here](#) for information on enrolling eligible dependents.

Enroll	Name	Relationship
<input checked="" type="checkbox"/>	Elaine McDonald	Spouse
<input checked="" type="checkbox"/>	Joaquin McDonald	Child
<input checked="" type="checkbox"/>	Kirk McDonald	Child

[Add/Review Dependents](#)

[Continue](#) Click **Continue** to validate your choice until you are ready to submit your final enrollment on the Enrollment Summary page.

[Cancel](#) Click **Cancel** to ignore all entries made on this page and return to the Enrollment Summary.

Create a New Dependent:

To enroll a dependent not showing in this table, select the Add/Review Dependents button shown above. This will take you to the Enrollment Dependent Summary. Select the Add a dependent link.

ORACLE

Home

FavoritesMain Menu > Self Service > Benefits > Benefits Enrollment

New Window

Enrollment Dependent/Beneficiary Summary

Click the Dependent/Beneficiary's name if you would like to review or change personal information.

[Add a dependent](#)

Dependent Information						
Name	Relationship to Employee	Date of Birth	Marital Status	Marital Status Date	Student	Disabled
Elaine McDonald	Spouse	01/01/1969	Married		No	<input type="checkbox"/>
Joaquin McDonald	Child	02/01/1995	Single		No	<input type="checkbox"/>
Kirk McDonald	Child	08/01/1998	Single		No	<input type="checkbox"/>

[Return to Event Selection](#)

[OK](#) [Cancel](#) [Apply](#)



Oracle Benefits Self-Service Guide

Complete all fields marked with an asterisk (*), and also the **Dependent's Social Security Number (SSN)**. (Ignore Student and Smoker status, as that is not used at Cal Poly. Contact the Benefits Office if you need to change the disabled status of a dependent.) Scroll to bottom and click "save."

The screenshot shows the Oracle Benefits Self-Service interface. The breadcrumb trail is: Favorites | Main Menu > Self Service > Benefits > Benefits Enrollment. A 'Home' link is in the top right, and a 'New Window' link is on the right. The page title is 'Dependent/Beneficiary Personal Information'. Below the title is a message: 'Click Save once you have added your Dependent/Beneficiary's personal information. This information will go into effect as of Jan 1, 0000.' The form is divided into three sections: 'Personal Information', 'Status Information', and 'Address and Telephone'. The 'Personal Information' section includes fields for *First Name, Middle Name, *Last Name, Name Prefix, Name Suffix, *Gender (dropdown with 'Male' selected), *Date of Birth (calendar icon), SSN (with '(Social Security Number)' text), and *Relationship to Employee (dropdown). The 'Status Information' section includes *Marital Status (dropdown with 'Single' selected), As of (calendar icon), Student (dropdown with 'No' selected), As of (calendar icon), Disabled (dropdown with 'No' selected), As of (calendar icon), and Smoker (dropdown with 'No' selected), As of (calendar icon). The 'Address and Telephone' section has a checked checkbox for 'Same Address as Employee' with pre-filled values: Country: United States, Address: 1 Main Street, San Luis Obispo, CA 93401. There is an unchecked checkbox for 'Same Phone as Employee' and a 'Phone:' field. A '* Required Field' note is present. At the bottom are a yellow 'Save' button and a 'Return to Dependent/Beneficiary Summary' link.

View confirmation page and click "OK."

The screenshot shows the 'Save Confirmation' page. The breadcrumb trail is: Favorites | Main Menu > Self Service > Benefits > Benefits Enrollment. A 'Home' link is in the top right, and a 'New Window' link is on the right. The page title is 'Personal Information' followed by 'Save Confirmation'. Below the title is a checkmark icon and the text 'The Save was successful.' At the bottom is a yellow 'OK' button.

Then scroll to bottom of page and select "Return to Dependent Summary." From the Enrollment Dependent Summary page, click on "Return to Event Section."



Oracle Benefits Self-Service Guide

Review the information on the Benefits Enrollment page. If correct, scroll to the bottom of the page and click “Continue.”

Continue	Click Continue to validate your choice until you are ready to submit your final enrollment on the Enrollment Summary page.
Cancel	Click Cancel to ignore all entries made on this page and return to the Enrollment Summary.

You will see a message in red “**Important: Your enrollment will not be processed until you submit your elections.**” You will submit your elections later in this process.

Review “Your Choice” and “Your Estimated Monthly Cost.” Click “Edit” to change your choices, or “OK” to complete this selection and return to the main page.

ORACLEHome

Favorites | Main Menu > Self Service > Benefits > Benefits EnrollmentNew Window

Benefits Enrollment

Medical

i Important: Your enrollment will not be processed until you submit your elections.

Your Choice

You have chosen Blue Shield NetValue Advantage with Employee + 2 or more coverage.

Your Estimated Monthly Cost

Your Cost: **\$ 0.00**

Your Covered Dependents

Name	Relationship
Elaine McDonald	Spouse
Joaquin McDonald	Child
Kirk McDonald	Child

Notes

Once submitted, this choice will take effect on 01/01/0000. Deductions for this choice, if any, are generally deducted in the pay period preceding your coverage begin date.

OK Click **OK** to store your choices.

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



Enroll in Medical Flex Cash or Dental Flex Cash:

If you are currently enrolled in a Medical or Dental plan, and you want to cancel your medical or dental and/or enroll in Flex Cash, you must first select “Edit” for those plans and waive your coverage.

Select an Option

Here are your available options with your monthly costs:

[Premiums](#)

Select one of the following plans:

☐ [PERS Care PPO](#)

Coverage Level	Your Costs	Tax Class
Employee Only	\$411.98	Before-Tax
Employee + 1	\$881.96	Before-Tax
Employee + 2 or more	\$1,160.75	Before-Tax

☐ [PERS Choice PPO](#)

Coverage Level	Your Costs	Tax Class
Employee Only	\$0.00	Before-Tax
Employee + 1	\$17.12	Before-Tax
Employee + 2 or more	\$36.46	Before-Tax

☐ [PERS SELECT](#)

Coverage Level	Your Costs	Tax Class
Employee Only	\$0.00	Before-Tax
Employee + 1	\$0.00	Before-Tax
Employee + 2 or more	\$0.00	Before-Tax

☐ [Blue Shield HMO ADVANTAGE](#)

Coverage Level	Your Costs	Tax Class
Employee Only	\$56.90	Before-Tax
Employee + 1	\$171.80	Before-Tax
Employee + 2 or more	\$237.54	Before-Tax

☐ [Blue Shield NetValue Advantage](#)

Coverage Level	Your Costs	Tax Class
Employee Only	\$0.00	Before-Tax
Employee + 1	\$0.00	Before-Tax
Employee + 2 or more	\$10.90	Before-Tax

☒ [Waive](#)

Continue

Click Continue to validate your choice until you are ready to submit your final enrollment on the Enrollment Summary page.

Cancel

Click Cancel to ignore all entries made on this page and return to the Enrollment Summary.



Oracle Benefits Self-Service Guide

Once that is completed, select the “Edit” button next to the Flex Cash options. You will need to complete this process for both Medical and Dental Flex Cash if you want both.

Benefits Enrollment

Open Enrollment

During open enrollment, you can review your medical, dental, FlexCash, HCRA and DCRA options and add, drop or change benefits coverage for yourself and your dependents. Detailed instructions are outlined in the eBenefits Step by Step Guide, which is available on the Cal Poly Benefits website.

i Important: Your enrollment will not be processed until you submit your elections.

Enrollment Summary

Edit	Medical	Before Tax	After Tax
Current: Blue Shield NetValue Advantage:Empl+Deps			
New: Waive			
Edit	Dental	Before Tax	After Tax
Current: Delta Enhanced II:Empl+Deps			
New: Delta Enhanced II:Empl+Deps			
Edit	Vision	Before Tax	After Tax
Current: Vision Service Plan:Empl+Deps			
New: Vision Service Plan:Empl+Deps			
Edit	Dental Flex Cash	Before Tax	After Tax
Current: No Coverage			
New: No Coverage			
Edit	Medical Flex Cash	Before Tax	After Tax
Current: No Coverage			
New: No Coverage			
Life and AD&D		Before Tax	After Tax
Current: Standard (10K / CSUFU): \$10,000			

After waiving a plan, you will see your new plan coverage displayed as "waive."



Oracle Benefits Self-Service Guide

Click the radio button next to the option of your choice. If you select Medical or Dental Flex Cash, the “Alternate Policy Information” fields will appear. Enter the information for your alternative coverage.

Please note: This benefit is for employees who have alternative, non-CSU coverage.

ORACLE

Home |

Favorites | Main Menu > Self Service > Benefits > Benefits Enrollment

[New Window](#)

Benefits Enrollment

Medical Flex Cash

As an employee of the CSU, you are eligible to participate in Medical FlexCash if you are not covered under a CSU medical plan (including coverage as a dependent of another CSU employee) and you have alternative non-CSU Medical coverage. Please read the [FlexCash Brochure](#) before enrolling in this plan.

If you choose to receive flex cash in lieu of CSU medical coverage, you will receive a monthly cash payment of \$128.00 per month.

i Important! Your current coverage is: No Coverage. You will continue with this coverage unless you elect to make a change.

Select an Option

Here are your available options.

Select the Flex Cash or Waive option

☒ [Flex Cash - Medical](#)

Coverage Level
Employee Only

☐ Waive

Alternate Policy Information

Insurance Carrier's Name

Social Security Number

Policy Number

Continue Click **Continue** to validate your choice until you are ready to submit your final enrollment on the Enrollment Summary page.

Cancel Click **Cancel** to ignore all entries made on this page and return to the Enrollment Summary.

Enter your alternate policy/group information, and select “Continue.”



Oracle Benefits Self-Service Guide

Review “Your Choice” and “Alternate Policy Information.”

Read the information under “Notes” carefully. If you agree, click “OK” to complete this selection and return to the “Benefits Enrollment: Open Enrollment” page, or click “Edit” to change your choices.

ORACLEHome

FavoritesMain Menu > Self Service > Benefits > Benefits Enrollment

Medical Flex Cash

i **Important: Your enrollment will not be processed until you submit your elections.**

Your Choice

You have chosen Flex Cash - Medical with Employee Only coverage.

Alternate Policy Information

You have indicated that you are covered under the following insurance policy:

Insurance Carrier's Name	Alternate Carrier	Policy Number 12345
Social Security Number	555998888	

Notes

Once submitted, this choice will take effect on 01/01/0000.

By clicking the **OK** button below, unless I'm waiving this benefit, I certify that I am covered by a non-CSU medical plan. I certify that I will maintain coverage in this medical insurance plan(s) on an ongoing basis and I agree to notify the Benefits Office within 60 days if I lose coverage under the medical insurance plan.

Unless I'm waiving this benefit, I certify that I have reviewed the FlexCash Brochure describing the CSU's optional FlexCash Plan, including the legal definitions and change in benefit election limitations authorized under Section 125 of the Internal Revenue Service (IRS) Code. I understand that regulations under the IRS Code require that my benefit choices authorized by my clicking the below OK button are irrevocable during this plan year unless I experience an allowable "family status change event" as defined in these regulations or other permitting events as described in the FlexCash brochure. I understand that my FlexCash enrollment in lieu of medical coverage will continue from year to year until I complete a new FlexCash Enrollment Authorization form to change or cancel FlexCash enrollment.

Unless I'm waiving this benefits, by clicking the **OK** button below, I certify that I have read and agree to the terms and conditions of the FlexCash Program as outlined in the [FlexCash Brochure](#).

By clicking the **OK** button below, I affirm I have reviewed and understand the [Disclosures and Privacy Notice](#) regarding information about my elections.

By clicking the **OK** button below, I authorize the Benefits Office to send necessary personal information to my selected providers to initiate and support my election. I consent to the use of Electronic Signature and acknowledge that it has the same legal and binding effect as signing my name.

OK Click **OK** to store your choices.

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



Enroll in a Flex Spending Plan for Health Care (HCRA) or Dependent Care (DCRA):

Continuation of HCRA and DCRA contributions is not automatic. You **MUST** re-enroll in these plans each year.

ORACLE

Home

FavoritesMain Menu > Self Service > Benefits > Benefits Enrollment

New Window

Benefits Enrollment

Open Enrollment

During open enrollment, you can review your medical, dental, FlexCash, HCRA and DCRA options and add, drop or change benefits coverage for yourself and your dependents. Detailed instructions are outlined in the eBenefits Step by Step Guide, which is available on the Cal Poly Benefits website.

Important: Your enrollment will not be processed until you submit your elections.

Enrollment Summary

Edit	Medical	Before Tax	After Tax
Current: Blue Shield NetValue Advantage:Empl+Deps			
New: Waive			
Edit	Dental	Before Tax	After Tax
Current: Delta Enhanced II:Empl+Deps			
New: Delta Enhanced II:Empl+Deps			
Edit	Vision	Before Tax	After Tax
Current: Vision Service Plan:Empl+Deps			
New: Vision Service Plan:Empl+Deps			
Edit	Dental Flex Cash	Before Tax	After Tax
Current: No Coverage			
New: No Coverage			
Edit	Medical Flex Cash	Before Tax	After Tax
Current: No Coverage			
New: Flex Cash - Medical:Empl Only			
Life and AD&D			
Before Tax			
After Tax			
Current: Standard (10K / CSUEU): \$10,000			
New: Standard (10K / CSUEU): \$10,000			
Edit	Flex Spending Health Care	Before Tax	
Current: No Coverage			
New: No Coverage			
Edit	Flex Spending Dependent Care	Before Tax	
Current: No Coverage			
New: No Coverage			



Oracle Benefits Self-Service Guide

After you select Flex Spending Health or Dependent Care, select the Health or Dependent Care Flex Spending radio button.

The screenshot shows the Oracle Benefits Self-Service portal. The top navigation bar includes the Oracle logo, a breadcrumb trail (Favorites > Main Menu > Self Service > Benefits > Benefits Enrollment), and a Home link. A 'New Window' link is also present. The main heading is 'Benefits Enrollment' followed by 'Flex Spending Health Care'. A paragraph explains that this flexible spending account allows employees to pay for eligible medical and dental expenses not covered by their insurance with pre-tax dollars. It advises reading the 'Health Care Reimbursement Account Brochure' before enrolling. Another paragraph states that the elected benefit amount must be considered carefully, as money not used by March 15 of the following calendar year is forfeited, and there is a \$1.00 monthly after-tax administrative fee. An important notice indicates that current coverage is 'No Coverage' and enrollment for the next plan year must occur during the annual open enrollment period. Under the 'Select an Option' section, there are two radio buttons: 'No, I do not want to enroll.' and 'Health Care Flex Spending'. The 'Health Care Flex Spending' option is selected and highlighted with a red box. At the bottom, there are 'Continue' and 'Cancel' buttons with their respective instructions.

ORACLE

Home

Favorites Main Menu > Self Service > Benefits > Benefits Enrollment

[New Window](#)

Benefits Enrollment

Flex Spending Health Care

This flexible spending account allows employees to pay for eligible medical and dental expenses not covered by their insurance with pre-tax dollars for themselves and their dependents. Please read the [Health Care Reimbursement Account Brochure](#) before enrolling in these benefits.

Please carefully consider your elected benefit amount, as money which is not used by March 15 of the following calendar year is forfeited. There is also a \$1.00 monthly after-tax administrative fee charged for each account.

i Important! Your current coverage is: No Coverage. If you wish to enroll for the next plan year, you must do so during the annual open enrollment period.

Select an Option

☐ No, I do not want to enroll.

☒ [Health Care Flex Spending](#)

Continue Click **Continue** to validate your choice until you are ready to submit your final enrollment on the Enrollment Summary page.

Cancel Click **Cancel** to ignore all entries made on this page and return to the Enrollment Summary.

Consider your elected benefit amount carefully! Once your coverage begins, you will not be able to change your elected contribution amount unless you have a change in status.

Click "Continue" to choose your monthly contribution.



Oracle Benefits Self-Service Guide

Please note the contribution minimum and maximum amounts.

Fill in your Annual pledge, or select the worksheet to calculate your annual pledge based on a monthly amount.

ORACLE

Home

FavoritesMain Menu > Self Service > Benefits > Benefits Enrollment

New Window

Benefits Enrollment

Flex Spending Health Care

This flexible spending account allows employees to pay for eligible medical and dental expenses not covered by their insurance with pre-tax dollars for themselves and their dependents. Please read the [Health Care Reimbursement Account Brochure](#) before enrolling in these benefits.

Please carefully consider your elected benefit amount, as money which is not used by March 15 of the following calendar year is forfeited. There is also a \$1.00 monthly after-tax administrative fee charged for each account.

Important! Your current coverage is: No Coverage. If you wish to enroll for the next plan year, you must do so during the annual open enrollment period.

Your contribution may not exceed \$000.00/month (\$0000.00/year), even if electing the FSA Debit Card (see below). Your minimum monthly contribution must be at least \$20.

Select an Option

☐ No, I do not want to enroll.

☒ [Health Care Flex Spending](#)

This plan requires that you specify an annual pledge amount.

If you are interested in obtaining an FSA Debit Card, you must submit a completed FSA Debit Card Request form to ASIFlex. If elected, the annual amount in your HCRA account will be reduced by a \$12 administrative fee. Refer to the CSU Systemwide [Benefits Portal](#) for additional information regarding the FSA Debit Card.

Refer to the CSU Systemwide [Benefits Portal](#) for additional information regarding the FSA Debit Card.

Annual Pledge: [Worksheet](#) Click **Worksheet** to help calculate your annual pledge for this plan year.

Continue Click **Continue** to validate your choice until you are ready to submit your final enrollment on the Enrollment Summary page.

Cancel Click **Cancel** to ignore all entries made on this page and return to the Enrollment Summary.

Select "Continue."



Oracle Benefits Self-Service Guide

Select the “Health Care Reimbursement Account Brochure” link, and review the IRS regulations carefully!

ORACLE

Home

FavoritesMain Menu > Self Service > Benefits > Benefits Enrollment

New Window

Benefits Enrollment

Flex Spending Health Care

i Important: Your enrollment will not be processed until you submit your elections.

Your Choice

You have chosen to enroll in the Health Care Flex Spending plan with an annual pledge of \$0,000.00.

I understand that IRS regulations require that my monthly deductions authorized by this election are irrevocable during this plan year unless I experience an allowable "status change event," as defined in these regulations and described in the [Health Care Reimbursement Account Brochure](#).

Your Contributions

Your approximate monthly contribution will be \$000.00.

Notes

Once submitted, this choice will take effect on 01/01/000 .

By clicking the **OK** button below, I certify that I have read and agree to the terms and conditions of the the [Health Care Reimbursement Account Brochure](#).

Deductions for this choice, if any, are generally deducted in the pay period preceding your coverage begin date.

OK Click **OK** to store your choices.

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

Click “OK” to *verify that you agree to the terms and conditions in the HCRA brochure*, and to continue. You will return to the “Benefits Enrollment Open Enrollment” page.



Oracle Benefits Self-Service Guide

Submit Your Final Elections:


Review your “Benefits Enrollment Open Enrollment” page carefully. Look at what you have selected under “New” for each plan. This will be your benefits coverage beginning January 1, 2022. You can log out and your selections will be stored, but not submitted. This will allow you to return and make changes prior to the Open Enrollment deadline of October 15, 2021 at 5:00 pm.

If you do not return and click on the submit button before the 10/15/21 deadline, your elections and changes will be lost!

When you are sure you have made all the selections you want, click on “Submit,” and begin finalizing your selections.

Submit

Your enrollment will not be processed until you click this **Submit** button and complete the next **Submit Benefit Choices** page.

 **Important:** After you submit your elections, the only time you may be able to make a benefit change is during the next annual open enrollment period or if you have a qualified life or job change event.

The Submit Benefit Choice Page will appear. Read the information on the page carefully. When you have read and agree to that information, select the check box under “Disclosures and Privacy”.

Click the “Sign” button to electronically sign your enrollment forms. Click “Submit” to finalize your enrollments.

Benefits Enrollment

Submit Benefit Choices

Disclosures and Privacy

☐

affirm I have reviewed and understand the [Disclosures and Privacy Notices](#) regarding information about my elections and the enrollment information below:

Electronic Signature to Authorize Elections

I authorize the California State Controller's Office to take payroll deductions (if any) for the benefits I selected. I also authorize the Benefits Office to send necessary personal information to my selected providers to initiate and support my coverage. I consent to the use of Electronic Signature. *Note: Your electronic signature has the same legal and binding effect as signing your name*

Sign

Submit

Click this **Submit** button to send your final choices to the Benefits Office.

Cancel

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



Oracle Benefits Self-Service Guide

Once submitted, you will receive a "Submit Confirmation" page.

ORACLE

Home

Favorites Main Menu > Self Service > Benefits > Benefits Enrollment

[New Window](#)

Benefits Enrollment

Submit Confirmation

You have successfully completed your enrollment and your choices have been submitted to the Benefits Office. You may print this page for your records.

Your enrollment choices will be in effect on January 1, 0000.

Your new election(s) normally will be processed overnight but may take up to three business days. You then can view your new elections on the Benefits Summary page by accessing the PeopleSoft Self Service Benefits Summary link on the Cal Poly Portal - Personal Info tab - My Benefits Info channel.

In the Benefits Summary page, enter the new coverage begin date (1/1/00 for Open Enrollment) and click the GO button to view your new benefit elections.

If you have any questions, please email Human Resources at humanresources@calpoly.edu, or call the HR Benefits main line at (805) 756-5436.

Click "OK." Your new election(s) will normally be processed overnight but may take up to three business days. You then can view your new elections on the Benefits Summary page by accessing the PeopleSoft Self Service "Benefits Summary" link on the Cal Poly Portal.

To view, enter the new coverage begin date (1/1/22 for Open Enrollment) and click the GO button to view your new benefit elections.

ORACLE

Home

Favorites Main Menu > Self Service > Benefits > Benefits Summary

[New Window](#)

Benefits Summary

To view your benefits as of another date, enter the date and click Go:

Type of Benefit	Plan Description	Coverage or Participation
Medical	Blue Shield NetValue Advantage	Employee + 2 or more
Dental	Delta Enhanced II	Employee + 2 or more
Vision	Vision Service Plan	Employee or Empl+Dep
Life and ADD	Standard (10K / CSUEU)	\$10,000

Go to: [Enroll in Benefits](#)

If after three business days, you view your benefits summary and you do not see what you selected, please contact the Benefits Office at 805-756-2236 or benefits@calpoly.edu.