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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
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.'

View Your Benefit Enrollments and Covered Dependents:
Select 'Benefits Enrollment.'
Make an Open Enrollment Election:
Select 'Enroll in Benefits' in your Benefits Summary (above).

To begin, choose the 'Select' button.
Review your Enrollment Summary.

**Current**: you will see the plans you have now.

**New**: you will see the plan you will have beginning January 1st. This new plan will change if you make an Open Enrollment change.
Change Your Plan or Update Your Dependents:
Select the 'Edit' button next to each benefit you are interested in updating.

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.
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.

NOTE: Not all HMO plans have providers in Santa Barbara County. If you choose an HMO, contact the insurance provider to select a Primary Care Physician (PCP) for yourself and your dependents. Each family member can have a different PCP. If you do not call, the insurance company will assign PCP's.
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.

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.
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 select 'Save.'

View confirmation page and select 'OK.'

Then scroll to bottom of page and select 'Return to Dependent Summary.' From the Enrollment Dependent Summary page, select 'Return to Event Section.'
Review the information on the Benefits Enrollment page. If correct, scroll to the bottom of the page and select 'Continue.'

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.' Select 'Edit' to change your choices, or 'OK' to complete this selection and return to the main page.
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.

<table>
<thead>
<tr>
<th>Plan</th>
<th>Coverage Level</th>
<th>Employee Only</th>
<th>Employee + 1</th>
<th>Employee + 2 or more</th>
</tr>
</thead>
<tbody>
<tr>
<td>PERS Care PPO</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>$411.98</td>
<td>$811.96</td>
<td>$1,160.75</td>
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<td>PERS Choice PPO</td>
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<tr>
<td></td>
<td>$0.00</td>
<td>$17.12</td>
<td>$36.45</td>
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<td></td>
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<td></td>
<td>$0.00</td>
<td>$17.12</td>
<td>$36.45</td>
<td></td>
</tr>
</tbody>
</table>

- **Waive**: Click to validate your choice until you are ready to submit your final enrollment on the Enrollment Summary page.
- **Exit**: Click to ignore all entries made on this page and return to the Enrollment Summary.
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.
Select 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: Alternate health plan cannot be Tri-Care, Medi-care, Medi-cal or through Covered California or another state agency. The alternate dental plan must be a non-state plan.

Enter your alternate policy/group information, SSN of the member, and select 'Continue.'
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 select 'Edit' to 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.
After you select Flex Spending Health or Dependent Care, select the Health or Dependent Care Flex Spending radio button.

Consider your elected benefit amount carefully! Once your coverage begins, you will not be able to change your elected contribution. Select 'Continue' to choose your annual contribution.
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.

Select 'Continue.'
Select the 'Health Care Reimbursement Account Brochure' link, and review the IRS regulations carefully!

Select '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.
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 1st. 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.  
**If you do not return and select the submit button before the deadline, your elections and changes will be lost!**

When you are sure you have made all the selections you want, select 'Submit,' and begin finalizing your selections.

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

Select 'OK.' It will take 1-3 business days to process your enrollment selections. 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/## for Open Enrollment) and select the 'GO' button to view your new benefit elections.

If after three business days, you view your benefits summary and you do not see what you selected, please contact the Benefits Office at 805-756-5436.