

Dear Employee,

Welcome to the Diocese of San Jose! We are delighted you are joining us, as your role is critical in fulfilling the Diocese of San Jose mission. As a benefits eligible employee, your coverage becomes effective on the **1st of month after hire date or change in status.** Please take time to review the attached information to become familiar with your benefits options and enrollment process. RetaTrust is the benefits administrator for the Diocese of San Jose with enrollment conducted on line through the Reta Trust/MyEnroll site.

Once all your on boarding Workday tasks are completed and I-9 verified by your location after your first day of employment, your data will be submitted on the weekly data transmittal to Reta Trust/MyEnroll to set up your online benefits enrollment interface.

When RetaEnroll has your online enrollment interface ready:

- 1) You will receive an email from: Security@reta-trust.org **Subject: Email Verification Request**
This is time sensitive and email address **must be** authenticated to receive access to proceed with enrollment
- 2) **After your email verification,**
You will receive email from: MyEnrollServices@basusa.com **Subject: New Hire Benefits Enrollment**
This email will include instructions on:
How to Obtain your User Name & Password **and** Making your Online Benefits Elections

If you have any questions regarding these emails, please contact RetaTrust at 1-877-303-7382

Important Reminders

- All benefits eligible employees are required to make benefits **elections online during your new hire 30-day introductory period** whether they elect to enroll **or** waive health benefits. (Enrollment process below).
- Your benefits are in effect as **1st of month after hire date or change in status**; however, your data will **not** be in your selected providers' system for a couple of weeks as it takes time for processing.
- Feel free to obtain health services however your healthcare provider will need to hold charges and submit them later once you are on the provider's system.
- Premiums for your elected coverage (i.e., employee health plan, dependent's coverage, voluntary life, Flexible Spending.....) will be charged **retro actively to benefits effective date**, therefore you may have a one-time, double deduction on your paycheck.
- **Adding Dependents** -Required Eligibility Verification. If you plan to enroll your dependents on your DSJ Health Plan, **please be ready to provide documentation** of dependent eligibility during enrollment for coverage to be approved. Please refer to the Dependent Eligibility Verification Requirements notice for list of documents. **Once approved, coverage and premiums will be retroactive to your benefits effective date**, therefore you may have a retroactive deduction on your paycheck.
- **Failure to enroll** in benefits **during your new hire 30-day introductory period** will result in waving benefits for the year. Your next benefit enrollment opportunity will be during the annual open enrollment in May 2020 or if you experience a Qualified Life Event Change as defined by the IRS Section 125 Guidelines **and it is reported** to DSJ Benefits Dept. within **30 days from event date**.
- If you have questions or need support with your Benefit enrollment process, contact DSJ Benefits Department at 408-983-0249 or Reta Trust at 1-877-303-7382.

BENEFITS ENROLLMENT PROCESS



Welcome to the Reta Trust!

After your email verification

How to Obtain your User Name & Password

Navigate to RetaTrust.org and click **Help** under the **Login** button. Get your User Name first by choosing the **User Name** option. Enter the email address associated with your RetaEnroll account. (*The email address you previously verified*)

Making your Online Benefits Elections (A User ID and Password is required to access site).

The enrollment site is available 24 hours a day, 7 days a week during your New Hire Enrollment period. When you are ready to make your elections, follow these five steps:

1. Go to www.retatrust.org and enter your User ID and Password in the upper right hand corner.

Your New Hire Open Enrollment starts -----and ends -----

GET STARTED HERE!

2. Follow the easy enrollment steps using the Enrollment Wizard.
3. Confirm or change your benefit options.
4. Approve your elections.
5. Print your benefits confirmation statement.

If you need to go back and make changes, you may do so as long as it is within your New Hire Enrollment period.

Adding Dependents -Required Eligibility Verification.

If you plan to enroll your dependents on your DSJ Health Plan, **please be ready to provide documentation** of dependent eligibility during enrollment for coverage to be approved. Please refer to the Dependent Eligibility Verification Requirements notice for list of documents. **Once approved, coverage and premiums will be retroactive to your benefits effective date**, therefore you may have a retroactive deduction on your paycheck.

For assistance please contact

Reta Trust 24 hours/7 Day Customer Support

- Personal Assistance call: **1-877-303-7382** (English & Spanish)
- Email: service@retaenroll.org
- On-Line Benefits Website: www.retatrust.org

Detailed plans summary is located at
Reta Benefits Center and Reference Library