

Dear Employee,

Welcome to the Diocese of San Jose! We are delighted you are joining our community; your role is critical in fulfilling our mission.

As a new Benefits Eligible Employee, you are entitled to participate in the Diocese of San Jose Benefits Plan for insurance coverage effective on the **1st of month after hire date or Change in Status** provided you complete your online enrollment **during your benefits election 30-day enrollment period**. RetaTrust is the benefits administrator for the Diocese of San Jose, all benefits **enrollments must be completed on line** through the Reta Trust/MyEnroll website*.

Your data will be submitted to Reta Trust/MyEnroll to set up your online benefits enrollment interface. When your Reta Enroll enrollment interface ready:

- 1) You will receive an email from: **MyEnroll.com - 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** - Go to www.retatrust.org and click on **Login** then on **FIRST TIME USERS** (use the email previously verified) follow instruction for Password

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

Important Reminders

- All benefits eligible employees are required to make benefits **elections online during the benefits elections 30-day enrollment period** whether they elect to enroll **or** waive health benefits.
(Elections process below)
- Your elected insurance coverage is in effect on the **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 **retroactively to benefits effective date**.
- **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 benefits elections 30-day enrollment period** will result in waving benefits for the year. Your next benefit enrollment opportunity will be during the annual open enrollment in May 2022 or if you experience a Qualified Life Event Change as defined by the IRS Section 125 Guidelines **and it is submitted directly to RetaTrust with required documents 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 Elections Process

RetaEnroll 360

After your email verification

How to Obtain your User Name & Password

Navigate to www.retatrust.org on **Reta Members & Employers Sign In** click on **First Time Users** Enter requested information. Email address associated with your RetaEnroll account is *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