



Open Enrollment Instructions

Below are general instructions to help you navigate through Open Enrollment on www.RotoBenefits.com.

Step 1: Everyone's Username & Password have been reset. To access Open Enrollment, click on the "Open Enrollment" button and use the Login Instructions below.

Login Instructions
1. Click The Open Enrollment button to the right. 2. Login with the following: Username: RR + First Initial + Last Name + Last 4 of SSN Password: Birthdate (YYYYMMDD)
Example
Name: John Smith, SSN: XXX-XX-1234, Birthdate: 5/1/1968 Username: RRJSmith1234 Password: 19680501

Step 2: The password you login with is temporary.

- On the Change Password page, you must enter your old password in the **Old password** field, which is your Birthdate (YYYYMMDD).
- Then, you must enter a new password on the **New password** field. It must be at least 8 characters long and contain at least one letter and one numeral.
- Confirm your password by typing it a second time in the **Confirm password** field.
- Click the **Save** button.



Change Password

Password must be at least 8 characters long and contain at least one letter and one numeral.

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Step 3: Click **Get Started** to begin the Open Enrollment process.

Welcome JOHN, you have **27 days left to enroll.**

Welcome to Roto-Rooter's Online Open Enrollment. [Restartpage Step](#)

Get Started

Review Profile Shop Benefits Checkout

Need to update your current benefits?
Have you had a qualifying life event such as a new addition to your family?
[Update your current benefits.](#)



Step 4: Before you can elect benefits, you must verify your personal information.

Verify your Personal Information and make changes if needed

This information is used for:

- reporting to the benefit carriers
- to issue your ID cards and process your claims
- to process your payroll, taxes, etc.

If any of the information is incorrect and you are unable to change it on this page, please contact the Roto-Rooter Benefits Department.

Basic Information	Contact Information
First Name * Middle Name	Address 1 * Address 2
Last Name * SSN *	City * State * Zip * Home Phone *
Personal Information	Cell * Office Phone * Alternate E-mail
Gender * Male Marital Status * Unreported	<p>You must specify a value</p> <p>You must specify a value</p>
Other	

Step 4 continued: Once you have reviewed and verified your information, click **Next: Review My Family**.

Other	Do you have Medicare?
Hire Date 04/29/2013	Medicare Part A * N
Years of Service 7	Medicare Part B * N
	Medicare Part D * N

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[Next: Review My Family](#)



Step 5: Review or add dependents. Once you have completed this, click **Next: Shop for Benefits.**

Review the Dependent Information on file below

Please add your dependents to the system.

The individual(s) listed in this table will be available to select for benefit coverage as well as to select as a beneficiary.

You may:

- Add New Dependents
- Edit Existing Dependent Information
- Remove Existing Dependent

If you intend to elect ANY benefits on your spouse and/or children they must be listed (i.e. medical, dental, vision, supplemental

Additional Content (1):
① **Dependent Documentation Req...**

[+ View More](#)

Current Family Members

+ Add Family Member

[← Back](#) **Next: Shop for Benefits**



Step 6: To elect benefits, click on the **Shop Plans** or **Start Survey** button out to the right of each benefit.

Current Benefit Elections

Review Profile — Shop Benefits — Checkout

- To change an election, click on the shop plans button to the right of each benefit.
- To complete enrollment, click continue at the bottom of the page.

Plan Year Effective from 01/01/2020 to 12/31/2020

Election Required Not Started

You need to enroll or decline the following benefits.

Affidavit of Spousal Health Care Coverage

Status: Not Started Dates: Last Updated **Start Survey**

Dental

No Plan Selected **Shop Plans**

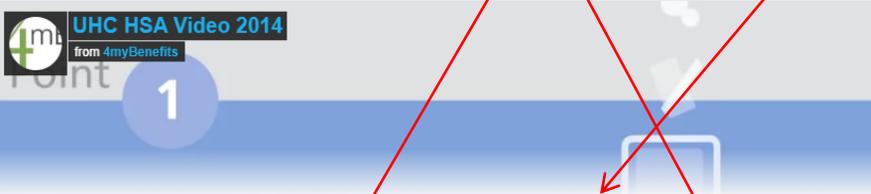
Vision

No Plan Selected **Shop Plans**

Step 7: For Medical, Dental and Vision benefits, a **Check Mark** indicates the family member is covered. If there is no check next to their name, they are not covered under that benefit.

- For documents and information regarding any of the benefits click on the **View More** button.
- You must click on **Update Cart** to make your election and move forward.
- If you wish to decline any benefit, please click on **Decline Medical Benefits**.

Select your Medical Plan



[View More](#)

Additional Content (1):

- Documents

Medical: United HealthCare Choice Plus with HSA

[← To Benefits](#)

Family Covered [+ Add Family Member](#)

<input checked="" type="checkbox"/>	Yourself	
<input checked="" type="checkbox"/>	Jim Halpert	
<input type="checkbox"/>	Employee Only	\$38.12 Per Pay Period
<input checked="" type="checkbox"/>	Employee + Spouse	\$95.60 Per Pay Period
<input type="checkbox"/>	Employee + Child	\$61.68 Per Pay Period
<input type="checkbox"/>	Employee + Children	\$90.67 Per Pay Period
<input type="checkbox"/>	Employee + Family	\$113.27 Per Pay Period



United HealthCare Choice Plus with HSA

\$95.60
Per Pay Period

[Update Cart](#)

[Decline Medical Benefits](#)



Step 7 continued: If you have previously declined a benefit, the screen may look like this. You may see your past benefit at the bottom of the screen. If you would like to decline again, you will need to click the **Decline Benefit** button.

Vision: EyeMed Vision

[← TO BENEFITS](#)

Family Covered

[+ ADD FAMILY MEMBER](#)

<input checked="" type="checkbox"/> Yourself	
Employee Only	\$1.20 Per Pay Period
Employee + Spouse	\$2.12 Per Pay Period
Employee + Children	\$2.28 Per Pay Period
Employee + Family	\$3.30 Per Pay Period

EyeMed Vision

\$1.20
Per Pay Period

[Update Cart](#)

[Decline Coverage](#)

Elected Coverage

Decline	\$0.00 Per Pay Period
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Past Benefit

Decline	\$0.00 Per Pay Period
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Step 8: To elect the amount you would like to contribute to your Health Savings Account (HSA), Flexible Spending Account (FSA), or Daycare Flexible Spending Account, please type in the ANNUAL amount you would like to contribute in the **Personal Contribution** box below. Then hit **Update Cart**. If you would like to decline HSA, FSA, or Daycare FSA, click on **Decline** below.

Select Coverage Amount

Annual Per Pay Period

Maximum Contribution Limits
Annual: \$3,850.00 | Per Pay Period: \$7.69

Annual Personal Contribution:
 [↑ Maximize My Contribution](#)

Minimum \$0.00 | Maximum \$3,450.00

Employer Contribution:

Total Annual Contribution:

Includes One-Time and Per Pay Period contributions
Minimum \$0.00 | Maximum \$400.00

Includes Personal and Employer contributions

Please note: Your election amount has changed due to calculation and rounding based on the amount you elected.

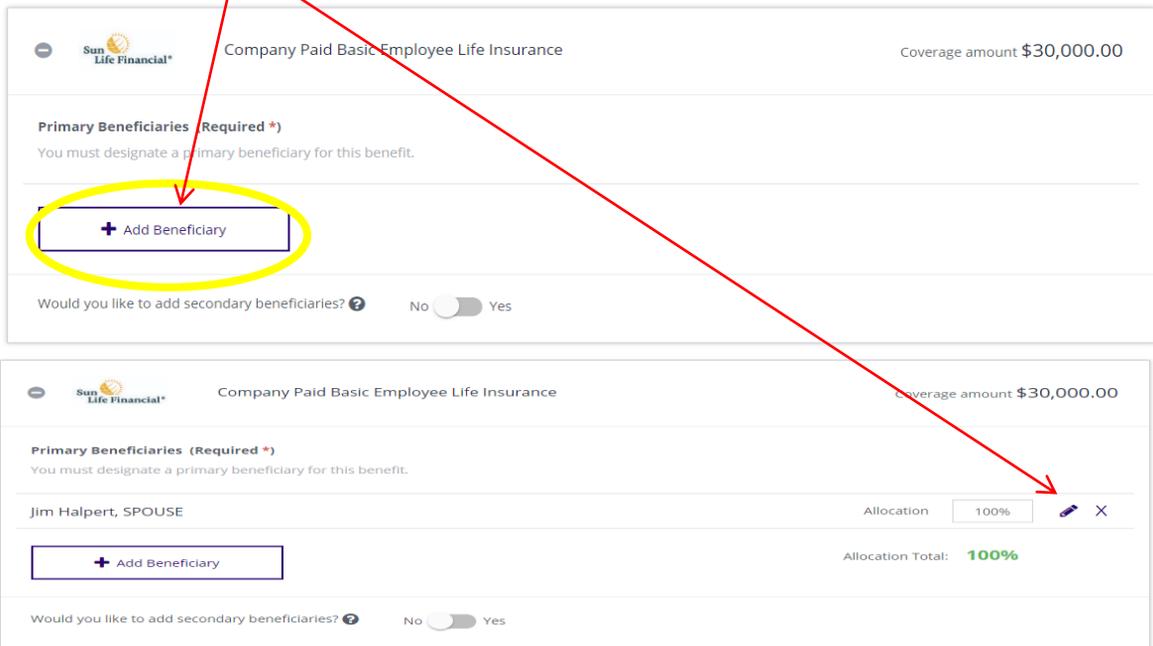
Personal Contribution: \$400.00
\$400.00 Annual Contribution = \$7.69 Per Pay Period Contribution

Employer Contribution: \$400.00
\$400.00 Annual Contribution = \$7.69 Per Pay Period Contribution

OPTUM Bank[®]
Optum Bank HSA
\$7.69
Per Pay Period
[Update Cart](#)
[Decline Coverage](#)

Step 9: Once you have elected all benefits, you must assign beneficiaries. Click on the **Review Beneficiaries** button at the bottom of the benefits summary page.

- You must assign a Primary Beneficiary for each benefit listed on the page. Click on the **Add Beneficiary** button. This can be one person, or multiple people.
- The total allocation must add up to 100%.
- First and Last Name, Date of Birth, and Relationship are required.
- Once completed, click on the **Review and Checkout** button.
- If you had assigned beneficiaries in a previous year they will be loaded into the system. Make sure you review your beneficiaries. If you need to change them click on **Pencil** button to change or update information. This will appear on any benefits where beneficiaries have been loaded.



The screenshots show the 'Company Paid Basic Employee Life Insurance' page with a coverage amount of \$30,000.00. The 'Primary Beneficiaries (Required *)' section indicates that a primary beneficiary must be designated. In the first screenshot, the '+ Add Beneficiary' button is highlighted with a yellow circle. In the second screenshot, a beneficiary named 'Jim Halpert, SPOUSE' is listed with an allocation of 100%. A pencil icon next to the allocation allows for editing, and the 'Allocation Total' is shown as 100%.

Step 10: Once you have completed all benefits and filled in all beneficiaries, scroll to the bottom of the **Confirm Your Benefit Elections** screen and click on the **Checkout** button.



The 'Confirm your Benefit Elections' screen features a progress bar with three steps: 'Review Profile' (indicated by a person icon), 'Shop Benefits' (indicated by a shopping cart icon), and 'Checkout' (indicated by a checkmark icon). The 'Checkout' step is currently active, as indicated by the checkmark icon.



Step 11: Enrollment Complete! is what you will see when you have completed your enrollment! To keep a copy, you can print it, email it, or save it as a PDF.

Enrollment Complete!

You have completed the open enrollment process and confirmed your benefits.

Need a copy of your benefits confirmation statement? [Send by Email](#)

Review Profile Shop Benefits Checkout

The coverage details listed below are the current active elections on file for you and your dependents.

- If you believe there is an error in your statement, please contact your Benefits Administrator.

Click on the icons below to print your confirmation statement or generate a pdf file.

Step 12: Don't forget to provide your documentation or fill out your EOIs. Once you have completed your Open Enrollment, you will see any documentation required to cover your dependents under **Your To-Do List**.

Your To-Do List 0 of 4 Complete

<input type="checkbox"/> Answer a few short health questions to complete your application for Sun Life benefits.	>
<input type="checkbox"/> Answer a few short health questions to complete your application for Sun Life benefits.	>
<input type="checkbox"/> Provide Marriage Certificate for Jim Halpert	>
<input type="checkbox"/> Provide Copy of Current Federal Tax Returns or a copy of a joint account statement dated within the past 60 days. for Jim Halpert	>

Step 13: We are here to help!

If you:

- get stuck at any point during your enrollment
- receive error messages that you can't move past
- need help enrolling
- have questions about benefits
- or would prefer to speak to someone

Don't hesitate to call the Benefits Call Center at **1(800) 996-4983**.

- The call center is available from 8:00am – 8:00pm Eastern Time Monday – Friday.