

Enrollment Session Preparation Worksheet

Bring this worksheet to your appointment with the Onsite Benefit Counselor to ensure your questions are answered about the benefits that are important to you and your family.

My Information

- Is my address correct in Oracle? Employee ID# _____
- Cell Number _____
- Emergency Contact _____
- Email Address _____
- Oracle User Name Note: Know your password & test your login before your appointment _____

My Dependent's Information

- SPOUSE
Name: _____ DOB _____ SSN _____
- CHILD(REN)
Name: _____ DOB _____ SSN _____
Name: _____ DOB _____ SSN _____
Name: _____ DOB _____ SSN _____

My Beneficiary

- Do I need to submit updated beneficiary forms?

My Benefits

Medical Insurance

- Review with the counselor primary care and specialty doctor office visits.
- Review with the counselor prescription drug usage.
- Do I understand the out of pocket expense for each plan, including my payroll deducted contributions?

Health Savings Account and Flexible Spending Account

- How much do I need to put aside for out of pocket medical related expenses this year?

Dental Insurance

- Do I understand Preventive Care? Do I understand when I have to pay for care?

Vision Insurance

- What are my needs for a vision plan? Who in my family needs an exam, glasses or contact lenses?

Disability Insurance

- Make sure I understand how it works

Basic Life Insurance

- Confirm my coverage Are my beneficiaries up to date?

Voluntary Benefits

- Whole Life – Unlike term life insurance that protects you for only a specific duration, whole life insurance offers protection throughout your lifetime.
- Accident – This coverage can help with out of pocket medical expenses due to an accident.
- Critical Illness – How would my savings be affected by an unexpected serious illness?
- Short Term Disability (Union Employees Only) – Protects you if you can no longer do your job as a result of illness or injury.

Questions for the Onsite Benefit Counselor:

BE PREPARED! Your Appointment Session Checklist:

- Schedule your appointment with a Onsite Benefit Counselor at www.bistatebenefits.com or scan >>>
- Read your benefit materials prior to your appointment and write down any benefit related questions
- Complete your Enrollment Session Preparation Worksheet
- Be prepared to make benefit decisions during your 30-minute onsite enrollment session
- Bring the dates of birth and social security number(s) for all eligible dependent(s) to your appointment

