Selerix/BenSelect Self-Enrollment Walkthrough

Welcome to your Trustmark Voluntary Benefits Open Enrollment!

This is your opportunity to review and take advantage of some of your special employee or member benefits.

Be sure to act now – this is usually the only time of year that you have the opportunity to select these benefits or make certain changes to them.

Before you start:

1. Think about your financial needs and those of your family. What type of protection will you need this year, and going forward?
2. Plan to spend about 15-20 minutes reviewing and selecting your benefits.
3. Make sure that you have information on hand about your spouse and dependents.



Voluntary Benefits

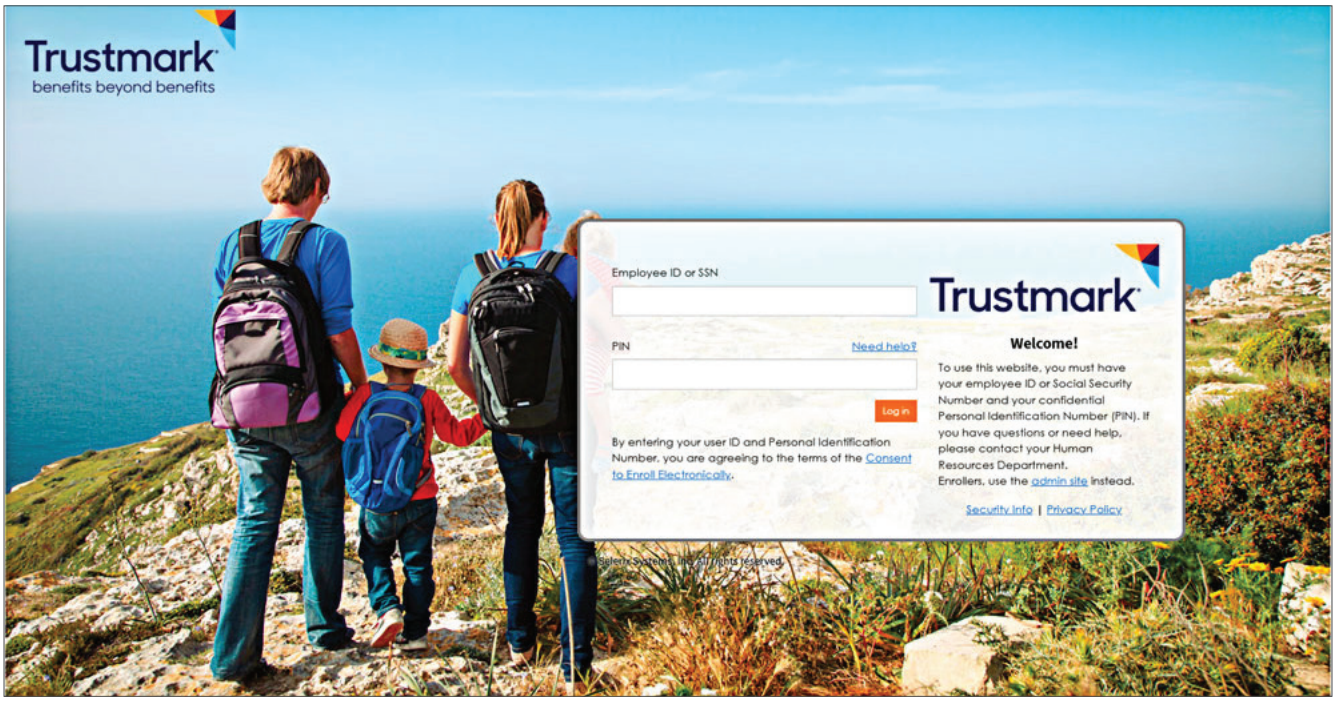
Trustmark®
benefits beyond benefits

Login Page

You can visit **www.trustmark.benselect.com/BishopsSchool** to log in.

When you are ready, log in with your **Employee ID or Social Security number, and PIN**. Your PIN is the last four digits of your SSN, followed by the last two digits of your birth year.

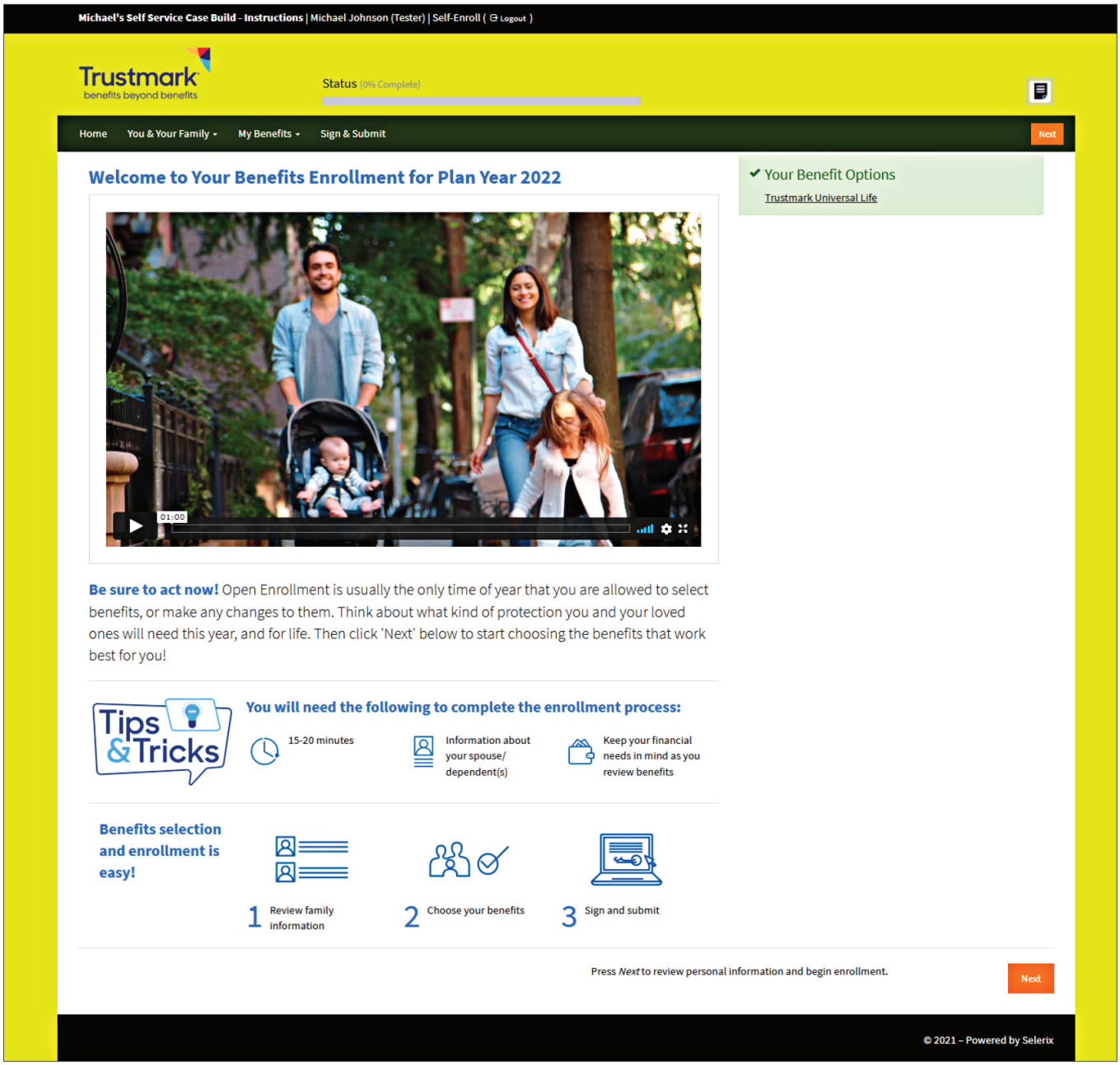
You may also wish at this time to review the **Security Info** and **Privacy Policy**.



Welcome Message

This screen provides **a welcome message, as well as a video** that you can watch to learn more about benefits.

When you are ready to continue, click **Next** at the below right.

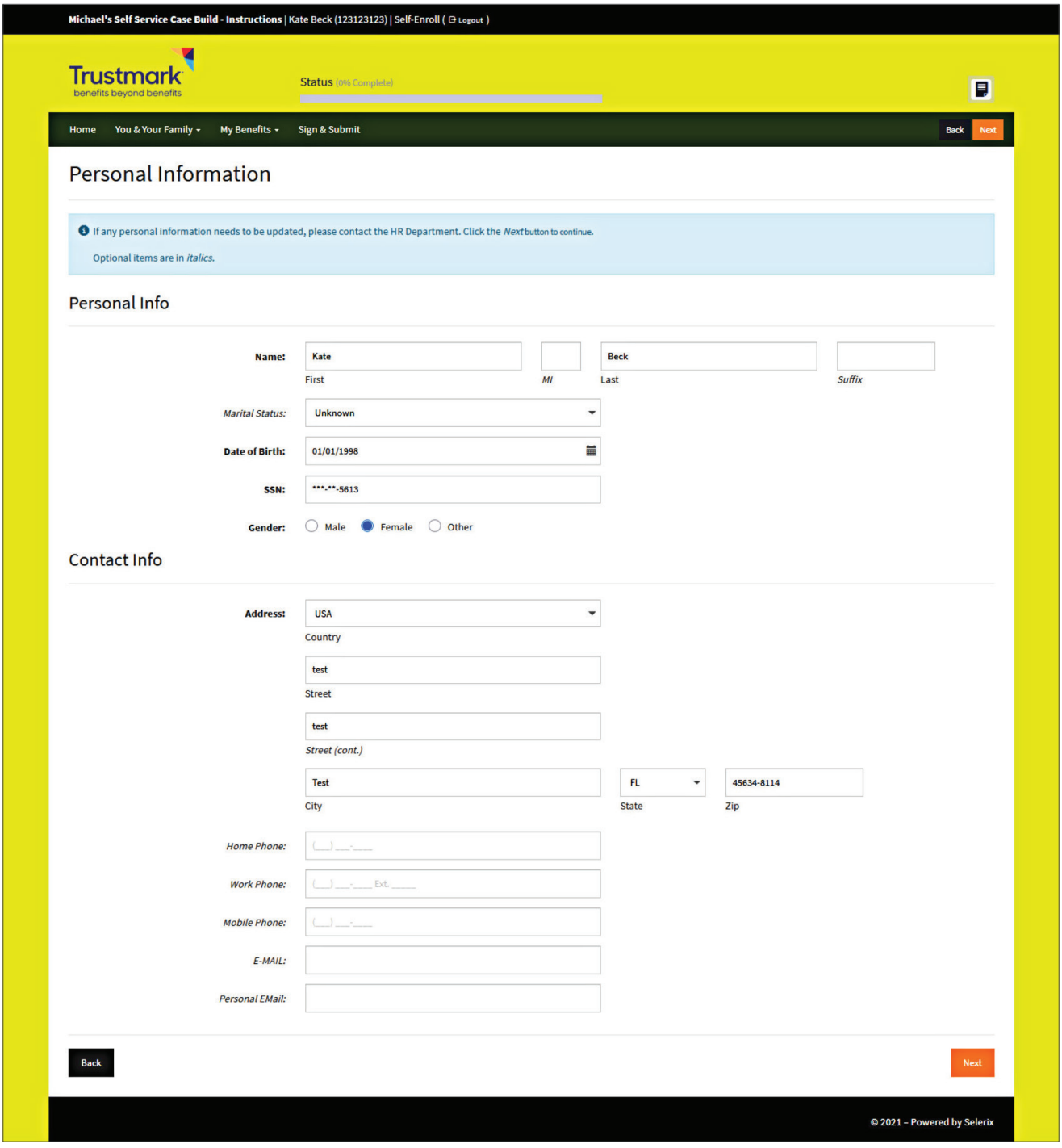


Personal Information

On this screen, you will **review and enter all of your personal information**. Some of this information may have been pre-populated. All fields with names shown in **bold lettering** are required.

Be sure to look through all of the information, confirm that it is correct and fill in anything that is missing.

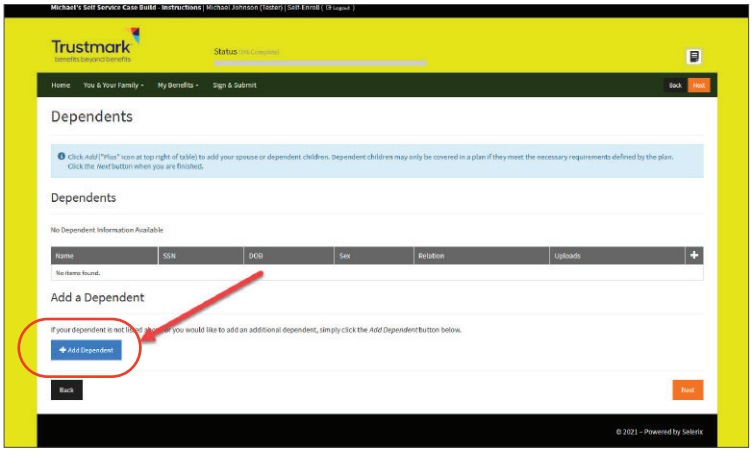
When you are done, click **Next** at the below right.



Dependent Information

On this screen, you can **add and/or review information about your dependents.** (Some information on your dependents may have been pre-populated.)

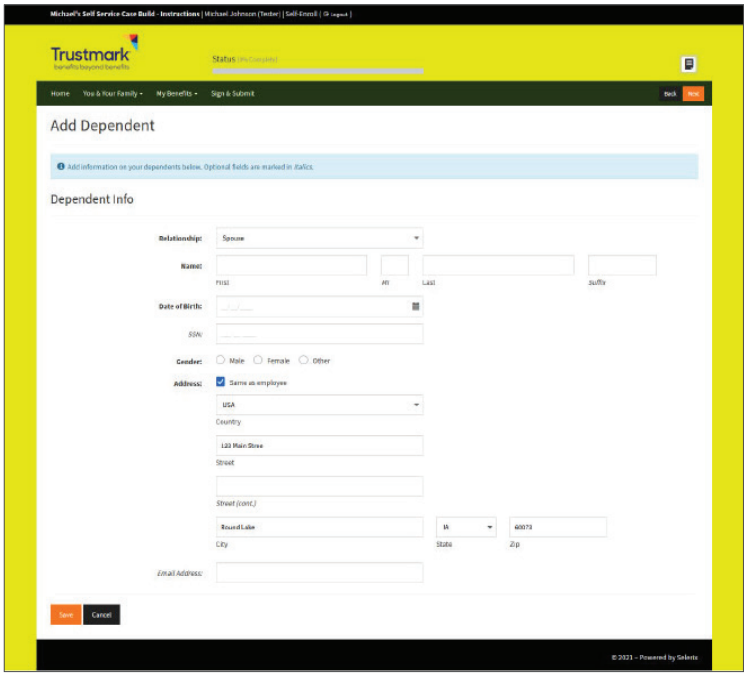
To add a new dependent, click the **"Add Dependent"** button.



You will be taken to a separate screen where you can add your dependent's information. All fields with names shown in **bold lettering** are required.

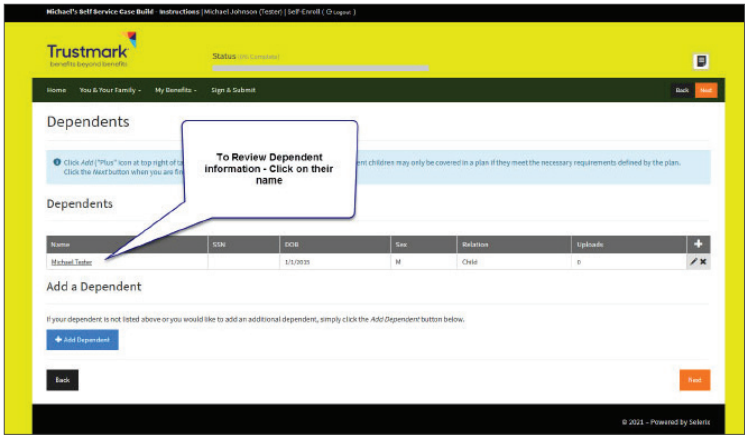
When you are done adding the information, click **Save**

Your dependent will be added to the list.



To **review a dependent's information**, click their name. You will be taken to that same screen with all information about the dependent shown. Please review and update information and click **Save** when done.

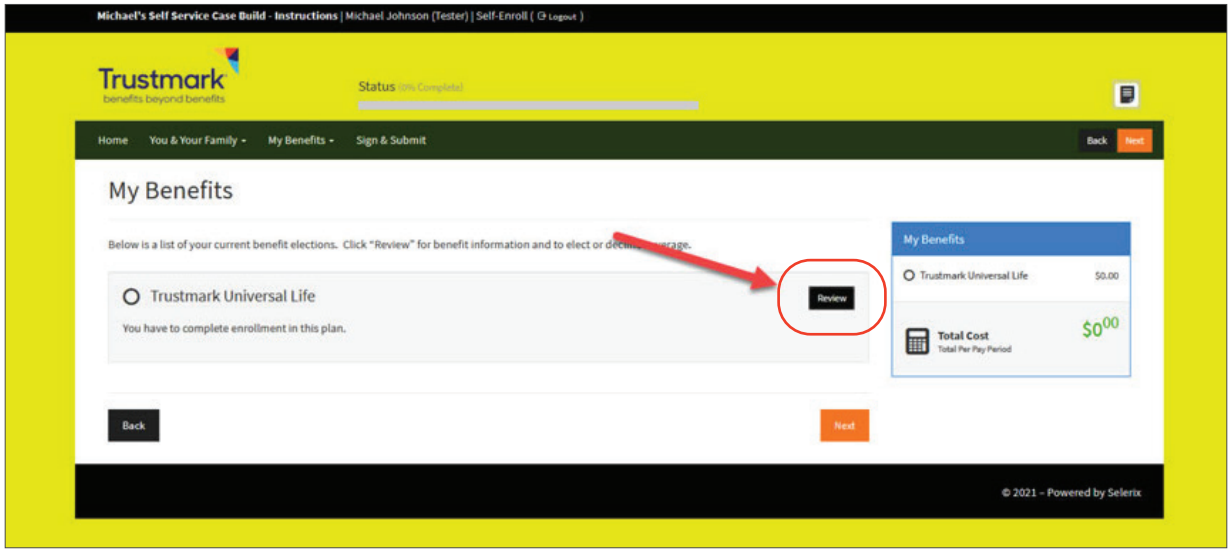
When all your dependents appear in the list, click **Next** at the below right.



Review Available Benefits

You will now be shown **a list of all your available benefits**.

Click **"Review"** on any of these to get started.



SPECIAL INSTRUCTIONS

Enrolling in Universal Life and/or Universal LifeEvents®

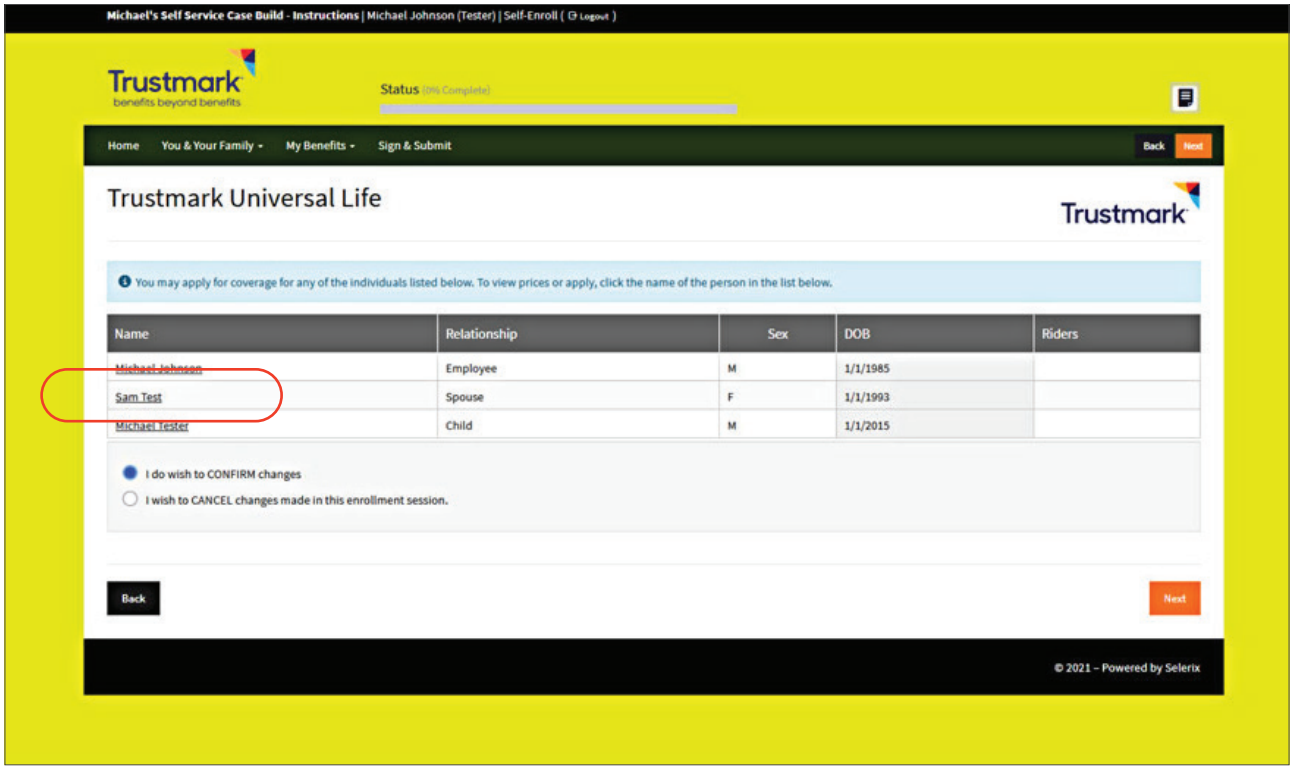
Enrolling in Trustmark Universal Life and/or Trustmark Universal LifeEvents is unique.

STEP 1

When you click **"Review"** for these products, you will be shown a list of names: yourself and/or any eligible dependents.

(Note: Eligibility may vary for these products.)

Click a person's name to begin enrolling for that person.



Enrolling in Universal Life and/or Universal LifeEvents®

STEP 2

This page contains information and a video about this Trustmark product. **Review this information and watch the video.**



When you are done reviewing, you may choose a benefit amount and premium from the list shown, or enter your own premium or benefit amount.

Under **"Application riders,"** you may be able to check or uncheck certain optional features. (Features with a grayed-out checkbox are not optional.) Select whether you wish to apply for coverage or decline coverage for the person whose name you clicked to arrive at this screen. Your decision is only for that person.

When you have made your selections, click **Next**

Enrolling in Universal Life and/or Universal LifeEvents®

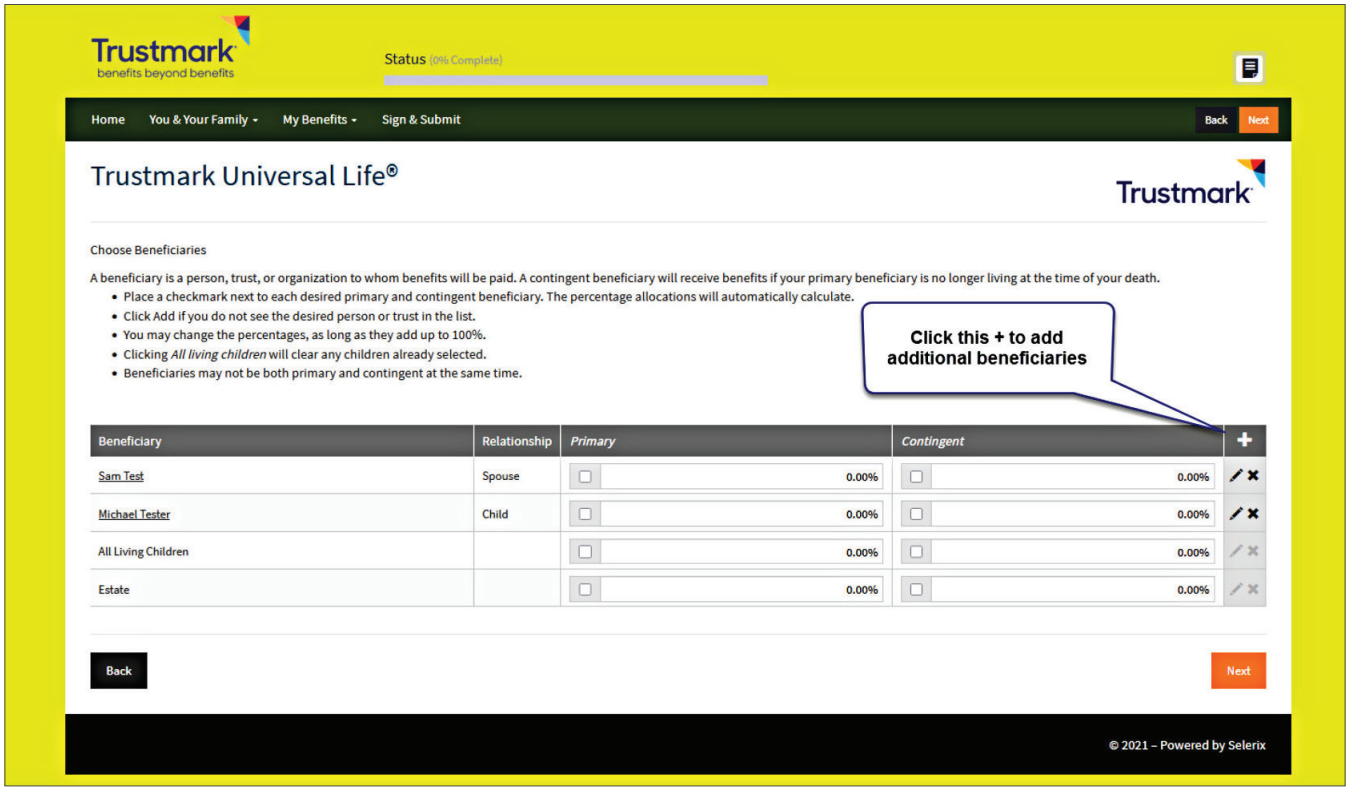
STEP 3

Trustmark Universal Life and Universal LifeEvents pay a death benefit to a beneficiary or beneficiaries when the covered person passes away. You need to select those beneficiaries in order to enroll.

Instructions on the page will tell you how to select your beneficiaries and assign them benefit percentages.

If you do not see a beneficiary listed, **click the + button** in order to add them. You will be taken to a screen where you are able to add your beneficiary.

When you have added and assigned percentages to all your beneficiaries, click Next



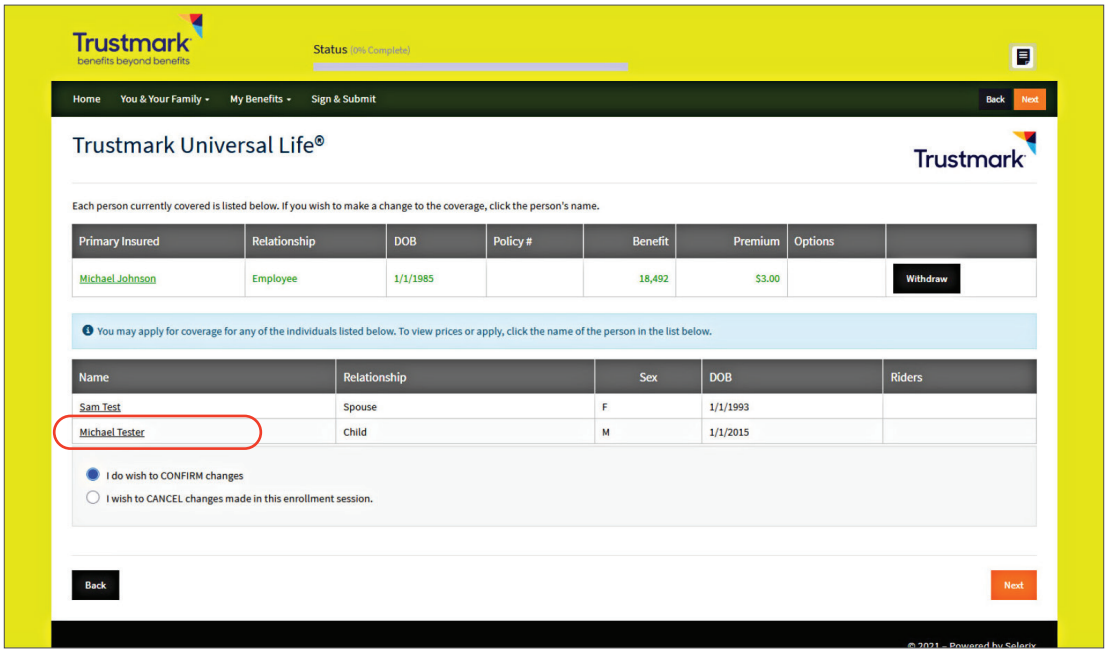
Enrolling in Universal Life and/or Universal LifeEvents®

STEP 4

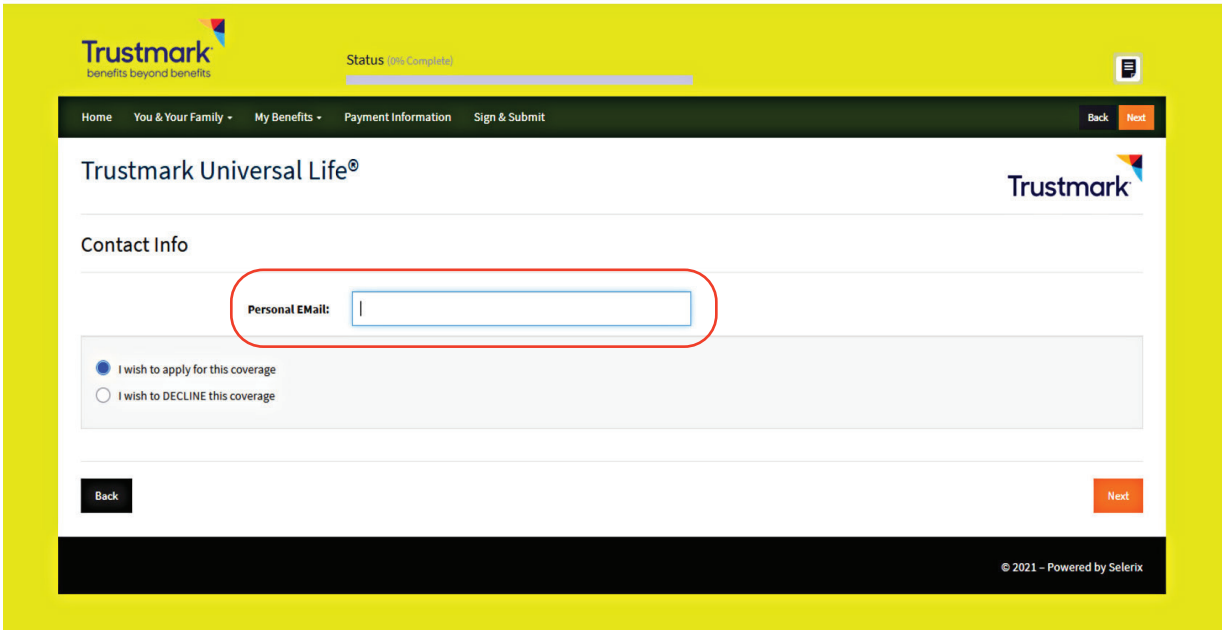
You will now be returned to the list of eligible persons for Trustmark Universal Life or Universal LifeEvents.

If you wish to enroll for another person, please click that person's name and repeat the above process.

When you have completed enrollment for all eligible persons, click **Next**



(At this point, you may also be asked to provide a **personal email address**. This is so Trustmark can reach you with important information about your plans, even if you change jobs or retire.)



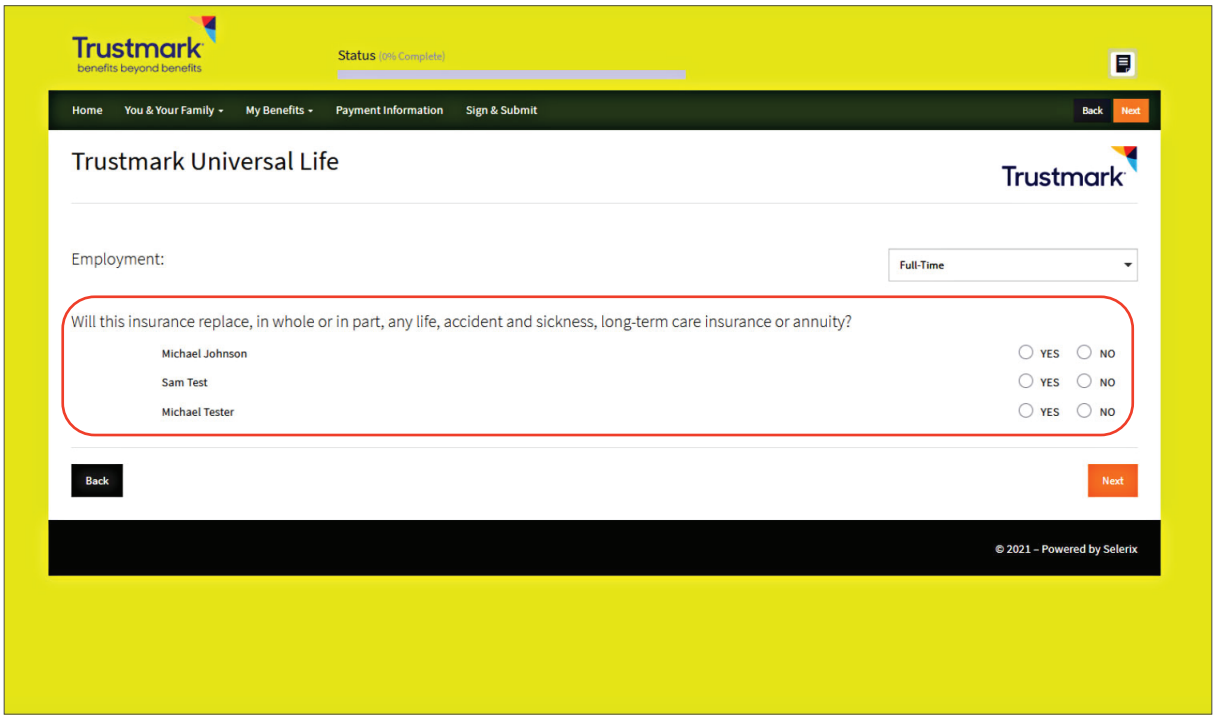
Enrolling in Universal Life and/or Universal LifeEvents®

STEP 5

At this point, you may be required to answer a few simple questions.

(NOTE: If you will be paying for benefits via bank draft, you may first need to provide your banking information.)

Please answer the questions, and click **Next**



You will now be returned to the screen that shows a list of all your available benefits.

Enrolling in Other Plans

(other than Trustmark Universal Life or Trustmark Universal LifeEvents®)

When you click **"Review"** on a Trustmark plan other than Universal Life or Universal LifeEvents, you will be guided through the steps to review your benefits and enroll.

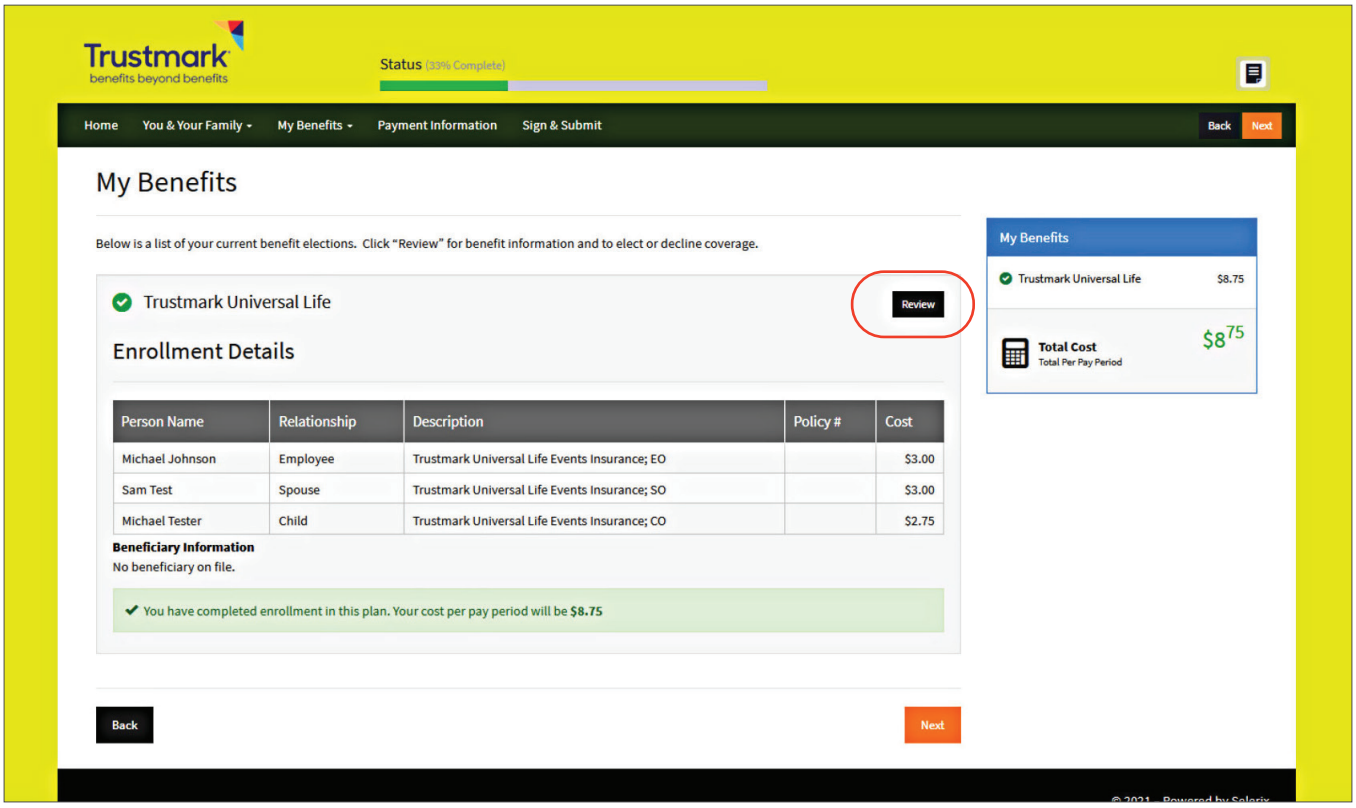
For these products, the process of enrolling is simple:

- You will not need to provide separate applications for each eligible person.
- You will not need to select any beneficiaries (unless you are enrolling in Trustmark Accident with an accidental death benefit.)
- You may or may not have to answer a few simple questions.

(NOTE: If you will be paying for benefits via bank draft, you may first also need to provide your banking information.)

When you are done with each page, click **Next**

When you are finished with each product, you will be returned to the list of available benefits, and you may select the next product to review.



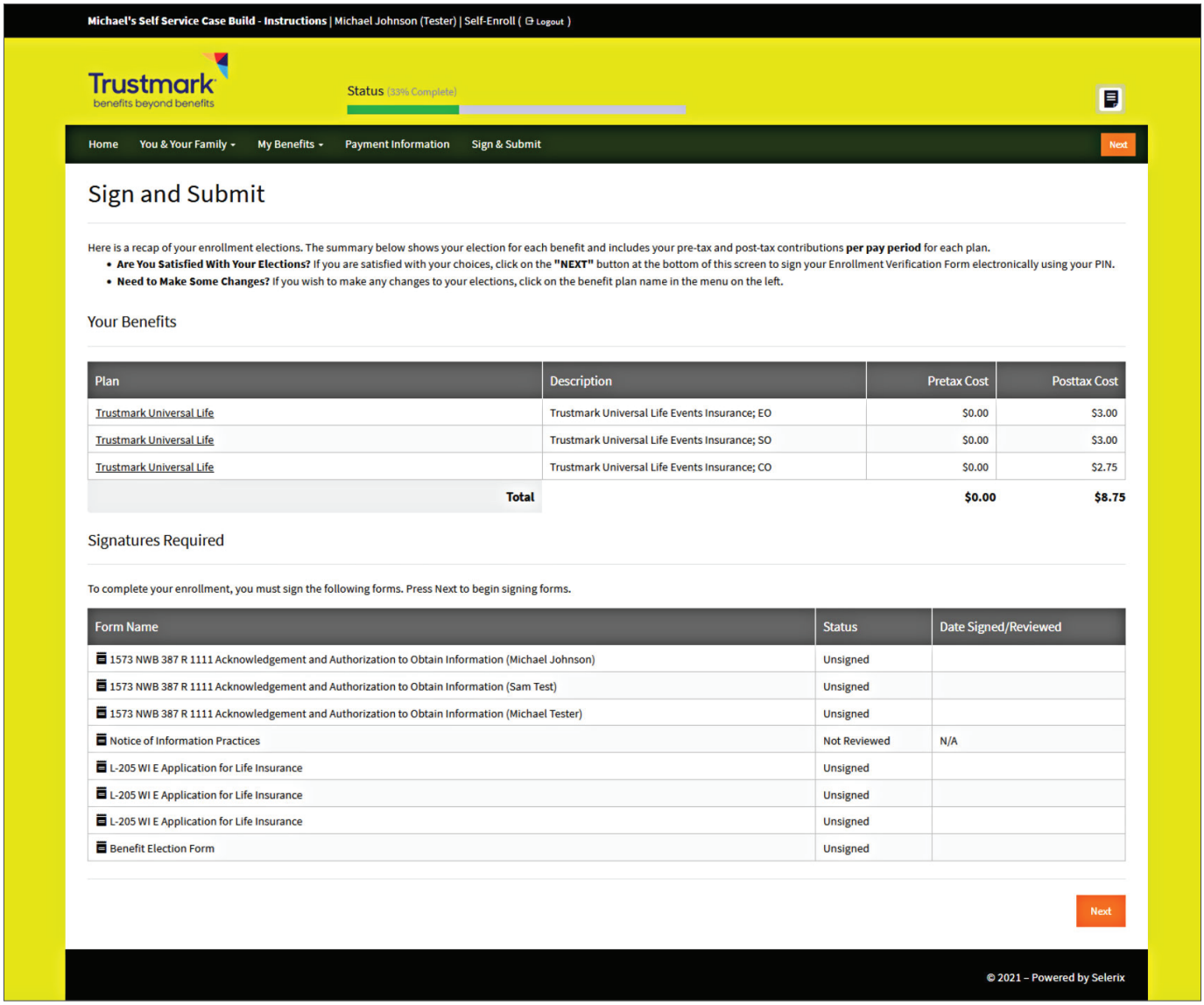
Sign and **Submit**

When you have finished reviewing and enrolling in all products, click **Next** at the bottom of the screen showing your available benefits.

You will be taken to a screen called **"Sign and Submit,"** showing your benefit elections and costs.

If you need to make any changes, click the plan on which you wish to change your elections.

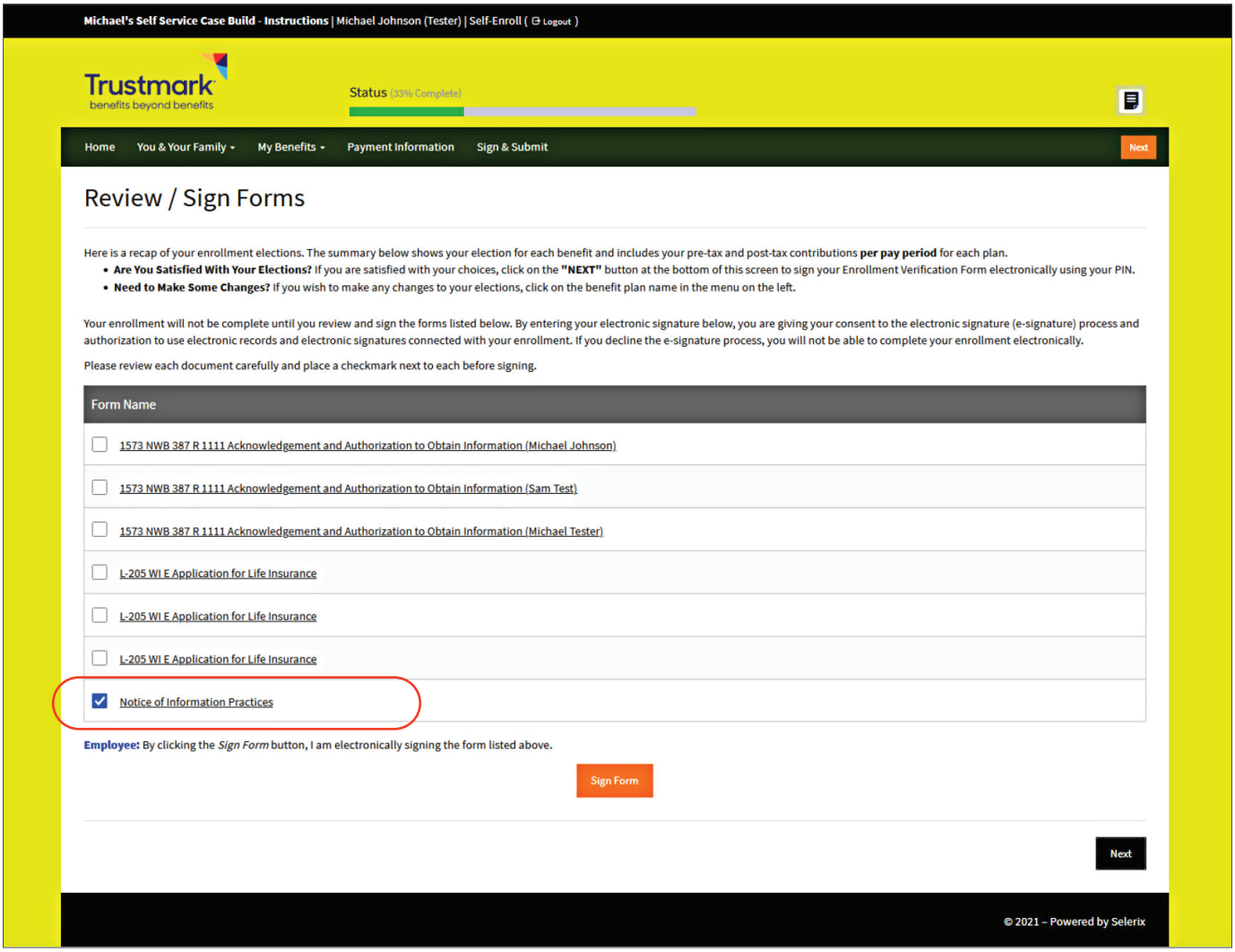
If you are satisfied with your elections, click **Next**



Review and **Sign**

On this page, **"Review / Sign Forms,"** click each link under **"Form Name"** to review the relevant informational document.

You may review and sign each form individually, or select the checkboxes next to each form on the **"Review / Sign Forms"** page and sign them all at once.

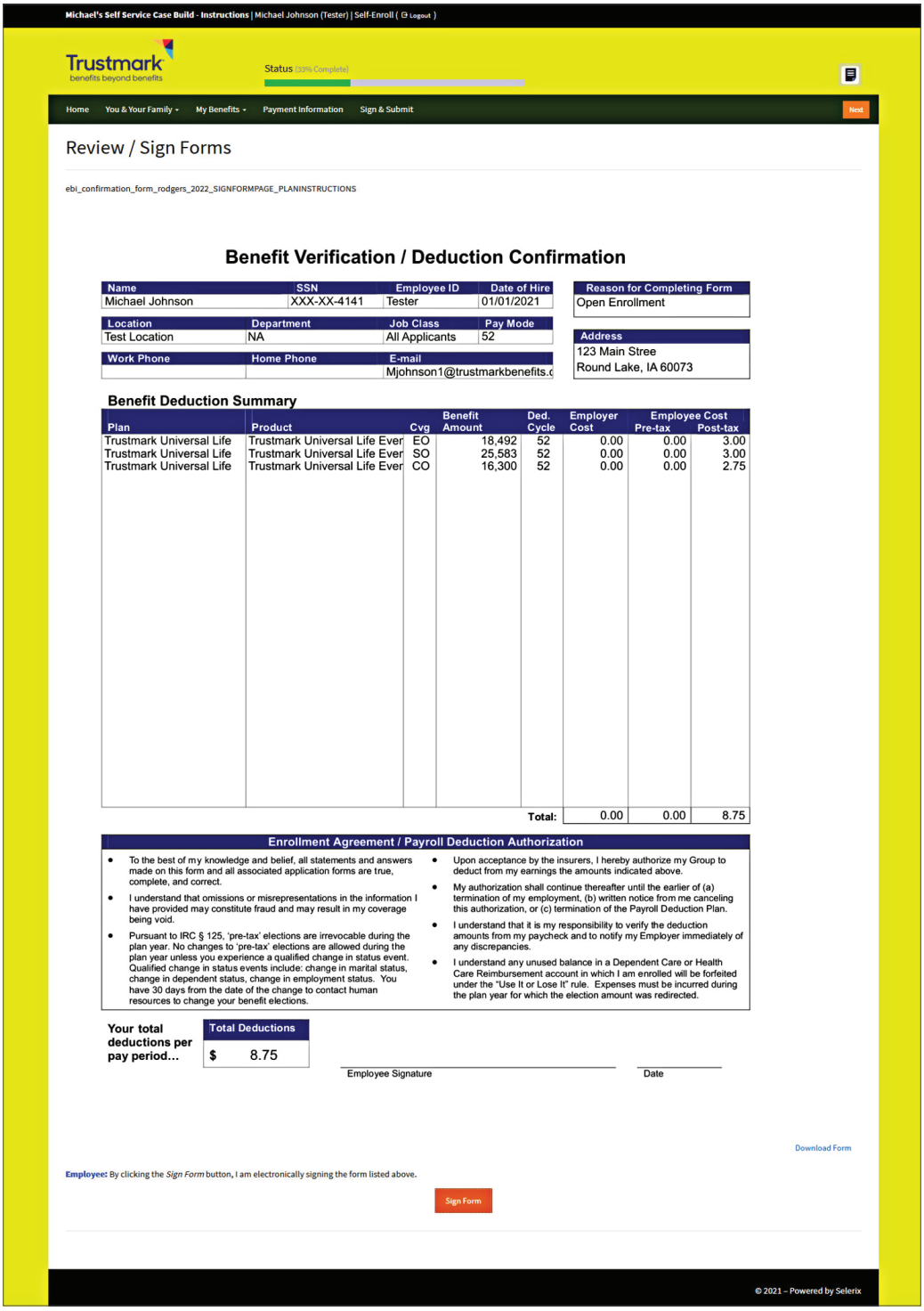


Your legal signature is applied by clicking the orange **Sign Form** button.

Benefit Verification and Deduction Confirmation

The final form will be your **Benefit Verification / Deduction Confirmation**.

You must review and sign this form individually.



Michael's Self Service Case Build - Instructions | Michael Johnson (Tester) | Self-Enroll (Logout)

Trustmark benefits beyond benefits

Status (33% Complete)

Home | You & Your Family | My Benefits | Payment Information | Sign & Submit | Next

Review / Sign Forms

ebi_confirmation_form_rodgers_2022_SIGNFORMPAGE_PLANINSTRUCTIONS

Benefit Verification / Deduction Confirmation

Name	SSN	Employee ID	Date of Hire
Michael Johnson	XXX-XX-4141	Tester	01/01/2021

Location	Department	Job Class	Pay Mode
Test Location	NA	All Applicants	52

Work Phone	Home Phone	E-mail
		Mjohnson1@trustmarkbenefits.c

Reason for Completing Form
Open Enrollment

Address
123 Main Stree
Round Lake, IA 60073

Benefit Deduction Summary

Plan	Product	Cvg	Benefit Amount	Ded. Cycle	Employer Cost	Employee Cost Pre-tax	Employee Cost Post-tax
Trustmark Universal Life	Trustmark Universal Life Ever	EO	18,492	52	0.00	0.00	3.00
Trustmark Universal Life	Trustmark Universal Life Ever	SO	25,583	52	0.00	0.00	3.00
Trustmark Universal Life	Trustmark Universal Life Ever	CO	16,300	52	0.00	0.00	2.75
				Total:	0.00	0.00	8.75

Enrollment Agreement / Payroll Deduction Authorization

- To the best of my knowledge and belief, all statements and answers made on this form and all associated application forms are true, complete, and correct.
- I understand that omissions or misrepresentations in the information I have provided may constitute fraud and may result in my coverage being void.
- Pursuant to IRC § 125, 'pre-tax' elections are irrevocable during the plan year. No changes to 'pre-tax' elections are allowed during the plan year unless you experience a qualified change in status event. Qualified change in status events include: change in marital status, change in dependent status, change in employment status. You have 30 days from the date of the change to contact human resources to change your benefit elections.
- Upon acceptance by the insurers, I hereby authorize my Group to deduct from my earnings the amounts indicated above.
- My authorization shall continue thereafter until the earlier of (a) termination of my employment, (b) written notice from me canceling this authorization, or (c) termination of the Payroll Deduction Plan.
- I understand that it is my responsibility to verify the deduction amounts from my paycheck and to notify my Employer immediately of any discrepancies.
- I understand any unused balance in a Dependent Care or Health Care Reimbursement account in which I am enrolled will be forfeited under the "Use It or Lose It" rule. Expenses must be incurred during the plan year for which the election amount was redirected.

Your total deductions per pay period...

Total Deductions
$ 8.75

Employee Signature _____ Date _____

Download Form

Employee: By clicking the *Sign Form* button, I am electronically signing the form listed above.

Sign Form

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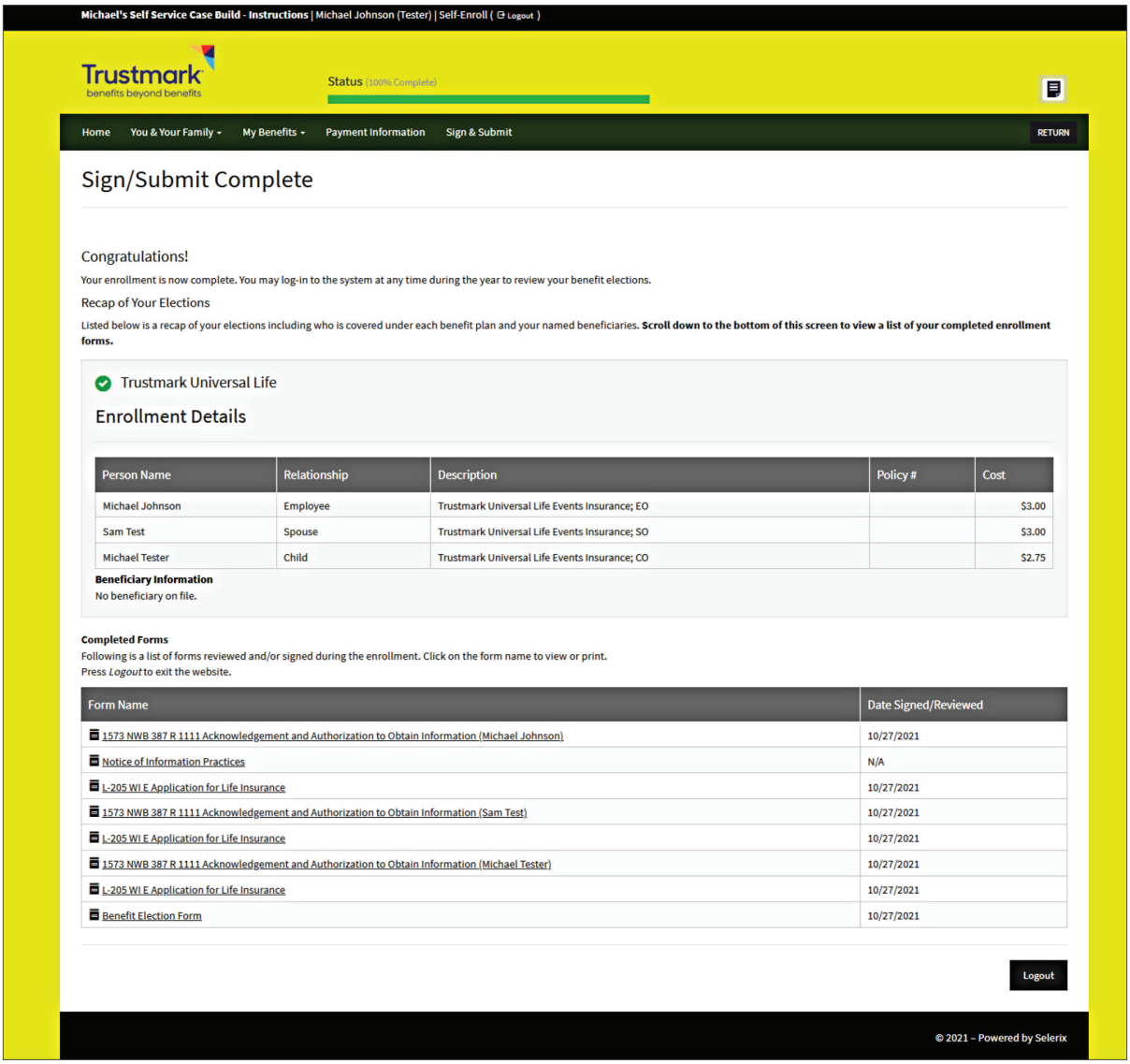
When you have signed this form, your enrollment is complete!

Enrollment Complete

Your enrollment is now complete and no more action is required for you to get your benefits.

You will now be taken to a page showing a recap of all your benefits elections.

On this page, you can also access all of your completed and filled out enrollment forms.



You care.
We listen.

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Products underwritten by Trustmark Insurance Company. In New York, products underwritten by Trustmark Life Insurance Company of New York.. Rated A- (Excellent) A.M. Best.

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