



CALIFORNIA SCHOOLS

VEBA YOUR HEALTH,
OUR PURPOSE

Event Scheduler Users Guide for **VEBA OPEN ENROLLMENT**

2025

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Legend

 **WARNING:** A WARNING icon indicates a potential for property damage, personal injury, or death.

 **CAUTION:** A CAUTION icon indicates potential damage to hardware or loss of data if instructions are not followed.

 **Important Note, Note, Tip, Mobile, or Video:** An information icon indicates supporting information.

Salesforce Event Scheduler User's Guide for VEBA Open Enrollment
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Version 2



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Overview

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Overview

At the beginning of Open Enrollment (OE) season, California Schools Voluntary Employees Benefits Association (VEBA) Account Managers will provide access to the Event Scheduler to Benefit Administrators (BA) via a website, californiaschoolsveba.my.site.com, which is powered by SalesForce. The scheduler allows you to reserve an appointment with your designated Account Manager to attend a district-sponsored event, either in-person or virtual, during the OE period.

Account Managers are available **Monday thru Friday, 8 AM - 6 PM**. For scheduling outside of these hours, please contact your VEBA Account Manager or Benefits@VEBA-Trust.com.

Table 1. Account Managers Event Attendance

Event Type	In-Person Attendance	Virtual Attendance
Insurance Committee	4 Hours Maximum	2 Hours Maximum
Member Informational	4 Hours Maximum	2 Hours Maximum
Open Enrollment	4 Hours Maximum	2 Hours Maximum

Important Notes

When using the Event Scheduler, be aware of the following items:

- The email address you use must match our internal records.
- If you encounter any issues, need to update your contact information, or require additional time than is available on the scheduler, email your VEBA Account Manager or Benefits@VEBA-Trust.com.
- You can schedule multiple events with your assigned Account Manager by completing a new form for each event.
- In order to complete an event-request form, please ensure you have *all* district OE information on hand.

For example: Open Enrollment period start-and-end dates.



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- When hosting virtual events, VEBA Account Managers use Zoom Video Communications.

Submitting a request for an event

- [Submitting a request for an event](#)

Submitting a request for an event

To submit an event-request to your VEBA Account Manager, complete the following steps.

- 1 Access site at californiaschoolsveba.my.site.com.
- 2 Enter your District **Email**, and click **Next**.

The email address you use must match our internal records.

The screenshot shows a web form with a header containing 'New Meeting' (underlined) and 'Modify or Cancel Meeting'. The main heading is 'Enter an email.' with a subtext 'This will be used to find your District(s)'. Below this is an 'Email' input field containing 'you@example.com'. A green 'Next' button is located at the bottom right of the form.

- 3 If you receive an error message, click **Previous** to try again.

The screenshot shows an error message page with a header containing 'New Meeting' (underlined) and 'Modify or Cancel Meeting'. The main heading is 'Sorry.' with a subtext 'Your information does not match our records. Please contact Benefits@VEBA-Trust.com or reach out to your assigned Account Manager.' At the bottom, there are 'Previous' and 'Finish' buttons.

i | **Note:** If the problem persists, contact your assigned VEBA Account Manager or Benefits@VEBA-Trust.com for additional support.

- 4 From the ***District** list, select your District, and click **Next**.
- 5 From the **Work Type Group** list, select the type of event you want to schedule, and click **Next**.

Select Work Type Group

What is this service appointment about?

- Insurance Committee - In Person
- Insurance Committee - Virtual
- Member Informational - In Person
- Member Informational - Virtual
- Open Enrollment - In Person
- Open Enrollment - Virtual

Previous **Next**

6 Complete the **Open Enrollment - <eventType> Meeting Request Form**, and click **Next**.

Note: The type of event selected in [Step 5](#) dictates the set of questions generated on the request form. You must answer all fields marked with an * to continue.

7 Use the various options available on the **Service Appointment Time** page to select the applicable date and time of your event, and click **Next**.

New Meeting [Modify or Cancel Meeting](#)

Select Service Appointment Time

July 14, 2024 - July 20, 2024

Time Zone: (GMT-07:00) Pacific Daylight Time (America/Los_Angeles)

SUN 14	MON 15	TUE 16	WED 17	THU 18	FRI 19
		12:15 - 2:15 pm			
		12:30 - 2:30 pm			
		12:45 - 2:45 pm			
		1:00 - 3:00 pm			
		1:15 - 3:15 pm			
		1:30 - 3:30 pm			
		1:45 - 3:45 pm			

8 Review your request, and click **Next**.

9 To complete your request, click **Submit**.

Note: You will receive a confirmation email shortly after submitting your request. You will also receive a second notification email with a prompt to add the event to your calendar. If your VEBA Account Manager is hosting a virtual event, a Zoom link will be provided in this notification.

Modifying or canceling a request

- [Modifying or canceling a request](#)

Modifying or canceling a request

To make changes to an existing event-request, complete the following steps.

- 1 Access your email, and open the confirmation email sent to you for your original event-request.
- 2 Located at the bottom of the email, click the link to **modify or cancel** your meeting.

If you change your mind, you can [modify or cancel](#) your meeting.

Thank you!

California Schools VEBA

- 3 After the link opens, make sure the tab **Modify or Cancel Meeting** is selected.



Select an action:

- Modify Service Appointment
- Cancel Service Appointment

- 4 Perform the following action:
 - To modify your request, select **Modify Service Appointment**, and Click **Next**.
 - To cancel your request, select **Cancel Service Appointment**, and Click **Next**.



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