






How to Complete Benefits Open Enrollment in Skyward

<p>STEP 1 When logged into the Skyward Employee Access portal, select the “Online Open Enrollment” tab at the top of your screen.</p>	 <p>ELMBROOK SCHOOL DISTRICT, WI</p> <p>SKYWARD</p> <p>Home Employee Information Time Off True Time FastTrack Open Positions FastTrack Screener Expense Reimbursement Online Open Enrollment</p> <p>Employee Access</p>																										
<p>STEP 2 - View Current Coverage You can view your current coverage elections by clicking arrow next to current and highlighting your plan group title. (ALL FULL; ADMIN; 30-39)</p> <p>In this example the plan group title is “ALL FULL” under the “Current Coverage” selection in the upper left of your screen. If 30-39 is seen those staff are part time (75-.99 FTE)</p>	 <p>Open Enrollment ☆</p> <p>Current Coverage ALL FULL</p> <p>Open Enrollment ALL FULL</p> <p>Employee Employee: Current Coverage Employee Setu</p>																										
<p>STEP 3 - Current Coverage Listing When your plan group title, (“ALL FULL” in this example), under “Current Coverage” is highlighted, your current coverage elections will appear in the center of the screen. Clicking on the arrow next to each plan will expand more details. I.e. Deduction per pay/month as well as benefit per pay / per month</p>	 <p>Views: General Filters: *Skyward Default</p> <table border="1"> <thead> <tr> <th>Plan</th> <th>Coverage</th> <th>Deduction Code</th> <th>pe</th> </tr> </thead> <tbody> <tr> <td>▶ DENTAL</td> <td>FAMILY</td> <td>5DENF</td> <td></td> </tr> <tr> <td>▶ HEALTH SAVINGS ACCOU</td> <td>FAMILY</td> <td>5HSAF</td> <td></td> </tr> <tr> <td>▶ HSA CONTRIBUTIONS</td> <td>FAMILY</td> <td></td> <td></td> </tr> <tr> <td>▶ LIFE/AD&D</td> <td>ALL</td> <td></td> <td></td> </tr> <tr> <td>▶ LONG TERM DISABILITY</td> <td>ALL</td> <td></td> <td></td> </tr> </tbody> </table>	Plan	Coverage	Deduction Code	pe	▶ DENTAL	FAMILY	5DENF		▶ HEALTH SAVINGS ACCOU	FAMILY	5HSAF		▶ HSA CONTRIBUTIONS	FAMILY			▶ LIFE/AD&D	ALL			▶ LONG TERM DISABILITY	ALL				
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<p>STEP 4 - Open Enrollment Process To begin the open enrollment process, highlight your plan group title, (“ALL FULL” in this example), under the “Open Enrollment” selection in the upper left of your screen.</p>	 <p>Open Enrollment</p> <p>Current Coverage ALL FULL</p> <p>Open Enrollment ALL FULL</p> <p>Emplo Open f</p>																										
<p>STEP 5 - Open Enrollment Plan Details See current plan details by selecting the arrow to the left of your highlighted plan in the center of the screen.</p> <p>The arrow will expand the selection to show you additional plan details.</p>	 <p>Views: Sub Plan Information Filters: *Skyward Default</p> <table border="1"> <thead> <tr> <th>Action</th> <th>S</th> <th>Plan</th> <th>Coverage</th> <th>Deduct per Mor</th> </tr> </thead> <tbody> <tr> <td>▼ Retain</td> <td></td> <td>DENTAL</td> <td>FAMILY</td> <td>16.4</td> </tr> </tbody> </table> <p>Sub Plan Information</p> <table border="1"> <tr> <td>Deduction:</td> <td>DENTAL-FAMILY</td> <td>Benefit:</td> <td>DENTAL-FAMILY</td> </tr> <tr> <td>Deduction per Pay:</td> <td>8.20</td> <td>Benefit per Pay:</td> <td>56.88</td> </tr> <tr> <td>Deduction per Month:</td> <td>16.40</td> <td>Benefit per Month:</td> <td>113.76</td> </tr> <tr> <td>Age Based:</td> <td>no</td> <td></td> <td></td> </tr> </table>	Action	S	Plan	Coverage	Deduct per Mor	▼ Retain		DENTAL	FAMILY	16.4	Deduction:	DENTAL-FAMILY	Benefit:	DENTAL-FAMILY	Deduction per Pay:	8.20	Benefit per Pay:	56.88	Deduction per Month:	16.40	Benefit per Month:	113.76	Age Based:	no		
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STEP 6 - Change/Drop Coverage

Employee Contributions to HSA and FSA must be re-elected. The retain amount defaults to ZERO. See Step 12.

If you want to **keep** your same Health and Dental coverage from the previous year, (“FAMILY” in this example), you do not need to make any changes. Proceed to STEP 12 of this job aid.

If you want to **change** your coverage type or **remove** a plan, highlight the plan you would like to change/remove, (“HEALTH SAVINGS ACCOUNT” in this example), then select the “Drop Coverage” button at the right of the screen.

If you wish to change your coverage for more than one plan, you must select Add/Drop for each plan you wish to change separately.

NOTE: *No action is needed for district-paid benefits such as Life/AD&D or long-term disability. *If you wish to purchase Voluntary Supplemental Life or Short-Term Disability insurance, please email

kaminsma@elmbrookschoools.org

Action	S ▲	Plan	Coverage
▶ Retain		DENTAL	FAMILY
▶ Retain		HEALTH SAVINGS ACCOUNT	FAMILY



STEP 7 - Adding Plan/Coverage

Once you have dropped a plan, you can then add a new plan.

Select “Add Coverage” at the right of the screen.



STEP 8 - Selecting a Plan to Add

A list of available plans will appear in the center of the screen. Highlight the plan you would like to add.

NOTE: *Single/Family coverage will not be visible on this screen. You are only highlighting the plan type. *Your current elections will not appear as an add option.

With the new plan highlighted, you must select the “Select” button in the upper-right

Plan Code ▲	Plan Description	Insurance Company
DCFSAOPT	DEPENDENT CARE FLEX SPEND AC	OPTUM
DENTAL	DENTAL	DELTA DENTAL
HSA	HEALTH SAVINGS ACCOUNT	U M R
LPFSA	LIMITED PURPOSE FLEX SPENDING	OPTUM
STDI	SHORT TERM DISABILITY INSURAI	MADISON NATIONAL LIFE
VOL LIFE	VOLUNTARY LIFE	NATIONAL INSURANCE SERVICES OF



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of your screen.

STEP 9 - Selecting Coverage to Add

After adding a new plan, you will be prompted to select the coverage you would like to add.

For a plan that offers an option of single or family coverage, both will appear on this screen. You must highlight your coverage choice.

With your coverage choice highlighted, you must select the “Select” button in the upper-right of your screen.



STEP 10 - Entering an Election Amount

If the new coverage you have chosen includes a pre-tax employee contribution option, you will be prompted to enter the **ANNUAL** amount you would like to contribute.

NOTE: Your annual election is divided by 24, (26-pay employees have 2 paychecks without a deduction and 22-pay employees have double-deductions in May and June).

Once you have entered your annual amount, select “Save” in the upper-right of your screen.

Election Amount

Annual Election Amount

Employee: ██████████
 Insurance Group: ALL FULL TIME EXCEPT ADMIN
 Insurance Plan: LIMITED PURPOSE FLEX SPENDING ACCT-OPTUM
 Ins Coverage: ALL

Enter the Annual Election Amount:



STEP 11 - Verifying New Plan

Once you complete the necessary steps of adding a new plan and/or coverage, you will be routed back to your open enrollment coverage overview screen.

The plan you added should now appear in your plan list with “Add” under the Action column in green lettering.

Action	S ▲	Plan	Coverage
▶ Add		LIMITED PURPOSE FLEX SPENDING	ALL
▶ Retain		DENTAL	FAMILY
▶ Retain		HEALTH SAVINGS ACCOUNT	FAMILY

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STEP 12 - Employee Contribution

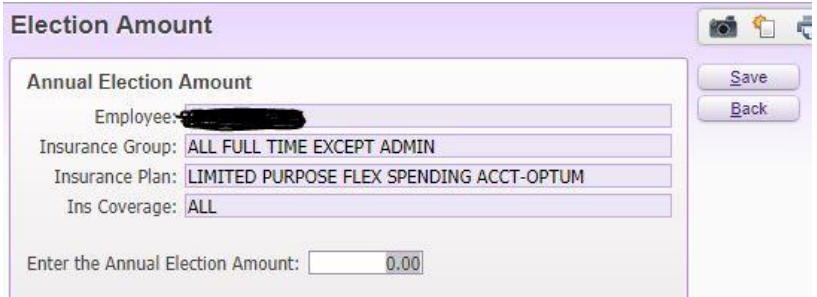
If you wish to contribute additional dollars pre-tax to your plan each pay period, you will need to highlight the plan and select the “Edit Election Amount” button at the right of the screen.

*NOTE: This amount **DOES NOT** carry over from your prior year’s elections. You must re-elect your contribution amount each year.*

You will be prompted to enter the **ANNUAL** amount you would like to contribute.

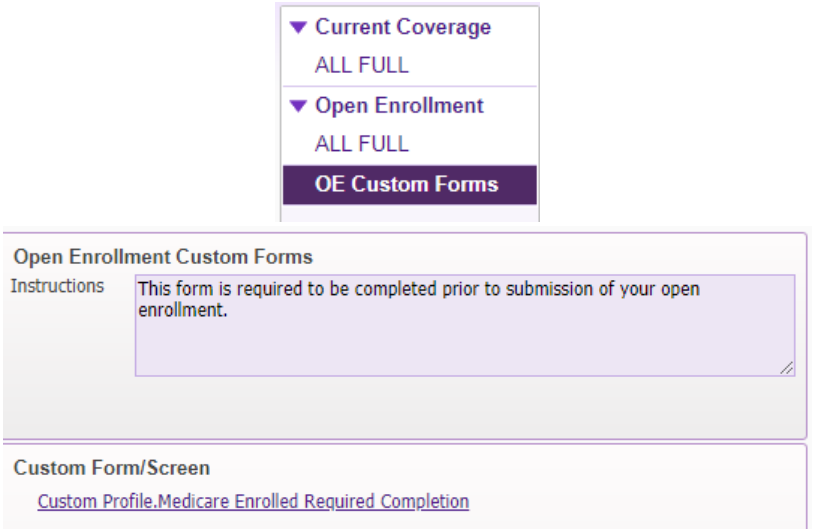
NOTE: Your annual election is divided by 24, (26-pay employees have 2 paychecks without a deduction and 22-pay employees have double-deductions in May and June).

Once you have entered your annual amount, select “Save” in the upper-right of your screen.



STEP 13 - OE Custom Form

Click on OE Custom Forms. Open file under Custom Form/Screen. Answer question, Save. Go back to Open Enrollment and proceed to Step 14.



STEP 14 - Completing Open Enrollment

Once you have reviewed all of your coverages, you must select the “Submit Coverage Selections to HR” button at the lower-right of your screen.



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Your open enrollment is now complete. Should additional forms or information be required, you will be contacted by a member of the Total Employee Rewards Team.

NOTES

THE FOLLOWING BENEFITS MUST BE ELECTED EACH YEAR

- Flexible Spending Account (FSA). Can only be done at time of open enrollment unless life changing event or new hire.
 - Limited Purpose Medical – IRS Maximum
 - Dependent Care – IRS Maximum
- HSA Employee Pre-Tax Contributions - Can be done anytime throughout the year. Allow 1-2 weeks to process on payroll.

OTHER BENEFITS THAT CAN BE ELECTED ANYTIME THROUGHOUT THE YEAR BY COMPLETING AN APPLICATION *

- Voluntary Life Insurance - Employee, Spouse and Dependent coverage available
- Short Term Disability Insurance

*Medical documentation may be necessary for each of these benefits and approvals/denials are handled through National Insurance Medical underwriting)

DISTRICT PROVIDED BENEFIT – (Provided automatically to those eligible)

- Health Savings Account (HSA) EmployER Contribution - \$1,000 Single / \$2,000 Family; upon full year (January - December) health insurance election.
- Life Insurance - 1x your salary, rounded to the nearest 1,000
- Long Term Disability

TOTAL REWARDS BENEFIT TEAM

- Lori Golomski – golomskL@elmbrookschoools.org
- Stephanie Matter – matters@elmbrookschoools.org
- Lisa Jennaro – jennarol@elmbrookschoools.org
- Lisa Robinson – robinsol@elmbrookschoools.org
- Chelsey Varga – vargac@elmbrookschoools.org
- Pamela Casey – caseyp@elmbrookschoools.org