Using Lynx Self Service at WSU:
Open Enrollment
Fiscal Year 2009-2010

Access Open Enrollment through the Faculty/Staff Portal at:
http://weber.edu

Open Enrollment Meeting Dates

Representatives from both Altius and Educators will be in attendance

- April 2\textsuperscript{nd} from 2:00 – 3:30 pm @ WB Smith Lecture Hall
- April 8\textsuperscript{th} from 11:00 am – 12:30 pm @ WB Smith Lecture Hall
- April 13\textsuperscript{th} from 3:00 – 4:30 pm @ WB Smith Lecture Hall
- April 17\textsuperscript{th} from 12:00 – 1:30 pm @ WB Smith Lecture Hall
- April 21\textsuperscript{st} from 4:30 – 6:00 pm @ WB Smith Lecture Hall
- April 23\textsuperscript{rd} from 2:00 – 3:30 pm @ Davis Campus room 117
- May 6\textsuperscript{th} from 8:30 – 10:00 am @ WB Smith Lecture Hall

Drop-In Lab Dates
(one-on-one help with the process of online enrollment -- no Altius and Educators representatives available)

- April 3\textsuperscript{rd} from 10:00 am – 12:00 pm in LP 203
- April 9\textsuperscript{th} from 9:00 – 11:00 am in LP 203
- April 14\textsuperscript{th} from 3:00 – 5:00 pm in LP 203
- April 23\textsuperscript{rd} from 4:00 – 6:00 pm in LP 203
- May 7\textsuperscript{th} from 8:00 – 10:00 am in LP 203
- May 14\textsuperscript{th} from 1:00 – 3:00 pm in LP 203
- May 15\textsuperscript{th} from 10:00 am – 12:00 pm in LP 203
# Table of Contents

Overview of Employee Services ......................................... 3
Navigation/Tips for Getting Around .................................... 3
Logging into Employee Services ......................................... 3
Starting Open Enrollment .................................................. 5
Medical ............................................................................. 6
Dental ............................................................................... 9
Pre-Tax Savings (Flex Spending) ........................................ 10
Completing Open Enrollment ............................................. 13
Dependents ....................................................................... 14
Things to Remember/Getting Help .................................... 17
Overview of Employee Services

Welcome to WSU's Employee Services Lynx Self Service web site. The goal of this site is to allow you to view your own employee information on the web. You can also participate in Open Enrollment through this site.

Did you know . . .

• Your pay information is available at this site?
• You can view your direct deposit breakdown?
• Your earnings and deduction history is available?
• Pay stubs are viewable?
• You can see your current balances for personal leave, sick leave, and vacation leave?

Navigation/Tips for Getting Around

• This website can be navigated like most websites where you can follow links or use the browser back button.

• It is a secure site, so your information is being protected through encryption.

Logging into Lynx Self Service

To log into the Lynx Self Service area:

• Log into the Faculty/Staff portal [http://weber.edu](http://weber.edu) using your GroupWise User ID and Password.

• Now, click on the “Lynx Self Service” channel on the Staff tab in the Faculty/Staff portal.

• The Folders will be expanded to include at least two options in the Main Menu that you can select: “Personal Information” and “Employee.” Employees who are authorized to view other services may view options such as “Student and Financial Aid,” “Finance,” etc.

• Click on “Employee”
You'll see a menu of options on your screen:

- Benefits and Deductions
- Pay Information
- Tax Forms
- Current and Past Jobs
- Time Off Current Balances and History
- Benefit Statement
- Building / Room Access Request

Benefits and Deductions allows you to view your health insurance information, flex spending accounts, miscellaneous deductions/benefits, and access open enrollment. The purpose of this manual is to overview open enrollment and review your beneficiary information.

Pay Information allows you to view your direct deposit allocations, your earnings and deductions history, and view your pay stubs.

Tax Forms allows you to view tax information. Two types of information are available:

- W-4 Tax Exemptions/Allowances -- Your W-4 information determines the amount of Federal Tax that is withheld from your pay. This form identifies the number of allowances you have chosen. It also identifies any additional withholding you have chosen. Complete a new W-4 to change withholding status by contacting the Payroll Office at room MA111A or ext 6031.

- W-2 Year End Earnings Statement -- The W-2 Year End Statement which appears is a representation of the actual form and should not be submitted to any government in place of the actual W-2 form. The information, however, can be used if you file electronically.

Current and Past Jobs shows your job history at WSU as of 1 July 2003.

Time Off Current Balances and History gives balances for personal leave, sick leave, and vacation leave.

Benefit Statement gives detailed benefit information.
Starting Open Enrollment

The Open Enrollment process will allow you to select your health care provider for the next benefit year and enroll in flex spending. If you do not wish to (1) change your current provider, or (2) participate in flex spending, you do not need to start the Open Enrollment process. The default is what you had last year (either EMIA or Altius medical and EMIA dental). Premiums will continue to be sheltered (pre-tax dollars).

If you wish to change your health care provider or participate in flex spending:

- Click on “Benefits and Deductions” from the Employee main menu. You will see six links:
  - Health Insurance
  - Flex Spending Accounts
  - Miscellaneous
  - Open Enrollment
  - Beneficiaries and Dependents
  - Benefit Statement

- Click on the fourth item, “Open Enrollment.” Figure 1 will appear.

- Click on “Start Open Enrollment” to begin the Open Enrollment process.

<table>
<thead>
<tr>
<th>Group</th>
<th>Benefits Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health</td>
<td>No choices made in this group</td>
</tr>
<tr>
<td>Flex Spending</td>
<td>No choices made in this group</td>
</tr>
</tbody>
</table>

![Figure 1]

Then, follow the directions on each screen. Buttons are located at the bottom of each page to allow you to perform special tasks. When you have completed your selections, click “Complete” open enrollment to submit your changes. Even if you started open enrollment but did not make any changes, please click “Complete” open enrollment.
Medical

- After clicking on “Start Open Enrollment,” Figure 2 will appear.
  
  o Note: You can restart the entire Open Enrollment process at any time by clicking on the “Restart” button at the bottom of the page. If you feel you made a mistake, just click “Restart” and begin again.

<table>
<thead>
<tr>
<th>Group</th>
<th>Benefits Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health</td>
<td>Pre-Tax EMIA Medical Insurance for Full Time Employees (FTE &gt;= .75) will be continued into the new year. Pre-Tax EMIA Dental Insurance for Full Time Employees (FTE &gt;= .75) will be continued into the new year.</td>
</tr>
</tbody>
</table>

Flex Spending: No choices made in this group.

Complete Restart Cancel Calculate Cost

Figure 2

- Figure 2 shows your defaulted options in Health and Dental.

  o Note: Your defaulted options are what you had last year. Remember, the premium you pay will be sheltered (pre-tax dollars) unless you notify WSU Human Resources that you do not want it sheltered.

  o Note: You must reapply for flex spending each year. Flex spending is above and beyond premium sheltering. There are three types of flex spending: Health Care, Health Care with the Benny™ Card, and Dependent Care. These will be detailed later on pages 10-11 of this manual.

  - If you want to change your health insurance carrier, click on “Health” (see Figure 2). Figure 3 will appear.

<table>
<thead>
<tr>
<th>Health Group</th>
<th>Pin Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-Tax EMIA Medical Insurance for Full Time Employees (FTE &gt;= .75) You have asked to continue this benefit into the new year.</td>
<td>Employee or Erly Retiree or more</td>
</tr>
</tbody>
</table>

Figure 3

- To change your Health Group carrier, click on your current Health Group hyperlink (Figure 3 shows EMIA Medical Insurance). After clicking on this hyperlink, Figure 4 will appear as shown on the next page.
Next, click on the “Stop Benefit” button at the bottom of the screen. After clicking on this button, you will be returned to the original screen where you can select the option you prefer. Every option is now hyperlinked (see Figure 5 below).

- Select the carrier you prefer by clicking on the appropriate carrier (hyperlink). For this example, the “Pre-Tax Altius Medical Insurance for Full Time Employees (FTE => .75)” option is selected. This will take you to Figure 6.
  - **Note:** The full-time EMIA choice is the first option and the full-time Altius choice is the second option listed. Unless you are less than full-time, you don’t need to worry about the other options.
Select “My Choice” by clicking on the appropriate radio button. Unless you are an early-retiree, you will only have to worry about the first three options:

- “Employee or Erly Ret+0” is for coverage on the employee only (self or single coverage).
- “Employee or Erly Ret+1” is for coverage on the employee plus one other dependent or spouse.
- “Employee or Erly Ret+2 or more” is for the employee plus two or more others. This is often considered family coverage.

Click on “Add Choice” at the bottom of the screen. You will automatically be taken back to the “Open Enrollment Group Detail” screen.

Figure 7 shows that Altius is now the chosen health care provider. It also shows the type of coverage selected and the employee amount to be paid.
Dental

- Remaining on the same screen (“Open Enrollment Group Detail”), scroll down to the dental information, as shown in Figure 8.

Since Altius does not have dental insurance, you will probably want to stay with the default (Pre-Tax EMIA Dental Insurance).

If you want to change your coverage type (i.e., switch from family coverage to self+1 coverage), follow these instructions:

1. Click on your current Dental Group (the hyperlinked EMIA Dental Insurance -- see Figure 8).
2. Change “My Choice” by clicking on the appropriate radio button, as shown in Figure 9. Unless you are a retiree, you will only have to worry about the first three options.
3. Click on “Submit Change” at the bottom of the screen.

Note that coverage type has been changed on Figure 10.
Pre-Tax Savings (Flex Spending)

There are two different types of pre-tax savings, as shown in the diagram below. The first type, non-reimbursable accounts, shelters premiums and is maintenance free (you don't have to do anything to maintain it). Your medical and dental premiums will be sheltered (paid with pre-tax dollars) unless you tell WSU Human Resources not to do so. The second type, reimbursable accounts (also known as flex spending), allows you to pay with pre-tax dollars your out-of-pocket medical and dependent care expenses. This type of pre-tax savings requires annual renewal. Additionally, receipts will need to be turned into EMIA for reimbursement and unused money will be forfeited at the end of the fiscal year.

Pre-Tax Savings Available in 2 Different Formats

<table>
<thead>
<tr>
<th>Non-Reimbursable Accounts</th>
<th>Reimbursable Accounts</th>
</tr>
</thead>
<tbody>
<tr>
<td>o Annual enrollment not required</td>
<td>o Annual enrollment required</td>
</tr>
<tr>
<td></td>
<td>o Receipts for reimbursement</td>
</tr>
<tr>
<td></td>
<td>o Funds can’t be carried over</td>
</tr>
<tr>
<td></td>
<td>o $1 admin. fee/pay period (additional $.83 to use the Benny card)</td>
</tr>
</tbody>
</table>

There are three types of reimbursable accounts: Health Care, Health Care with the Benny™ Card, and Dependent Care.

1. **Health care flex spending** can be used to reimburse your out-of-pocket expenses incurred for treatment of yourself, your spouse, and your eligible dependents. Eligible health care expenses include things like co-payments, orthodontics, eyeglasses, birth control medication, etc. This choice requires a $1.00 per pay period administration fee.
2. **Health care flex spending with the Benny card** is identical to option (1) above. However, it allows you to use a special debit card that automatically draws from your flexible spending account fund when you incur eligible health care expenses. The fee to use this choice is $1.83 per pay period ($1.00 admin. fee + $.83 Benny card fee = $1.83).

- The Benny™ Card frees you from spending money out-of-pocket at the time of purchase, submitting paperwork, and waiting for reimbursement checks for the vast majority of health care purchases. You do, however, need to keep receipts for auditing purposes (occasionally you will be required to send in a receipt).

- It also allows you to check your account balance online at anytime.

3. **Dependent care flex spending** can be used to reimburse your dependent care expenses. Eligible dependent care expenses include dependents under age 13, a dependent who is physically or mentally not able to care for self, or your spouse who is physically or mentally not able to care for self. This choice requires a $1.00 per pay period administration fee. If you are already participating in health care flex spending, there is no additional administration fee.

For more information about flex spending, consult the “Flexible Spending Account: A Summary of the Reimbursement and Non-Reimbursement Account Arrangements” pamphlet provided by EMIA. You can also get a copy from WSU Human Resources.

If you have decided to participate in Flex Spending, you noted that there is a fee for this service. You will need to add this fee into your Medical flex spending account. This fee is not charged for sheltering premiums, only for participating in the Health Care or Dependant Care flex spending programs.

- If you have decided to participate in Flex Spending, click on “Flex Spending” from the “Open Enrollment” main menu (Figure 11 below).
  - Note: You must have started Open Enrollment in order to do this.

![Figure 11](image-url)
• Select the type of expense reimbursement you want to participate in by clicking on the appropriate hyperlink (see Figure 12). (See descriptions on pages 10 and 11 of this manual.)

**Flex Spending Group**

- [Flex Spending - Health Care Expense Reimbursement](#) You have not selected this benefit deduction.
- [Flex Spending - BennyCard Health Care Expense Reimbursement](#) You have not selected this benefit deduction.
- [Flex Spending - Dependant Care Expense Reimbursement](#) You have not selected this benefit deduction.

**Figure 12**

- If you clicked on Health Care (no BennyCard), Figure 13 will appear.

**Amount shown is per pay period.**

- Indicates a required field.

**Flex Spending - Health Care Expense Reimbursement**

- **Deduction Effective as of:** Jul 01, 2009
- **Employee Amount** 999,999.99: 25.00
- **Fiscal Year Limit** 999,999.99: 

- **Add Choice**

**Figure 13**

- In the “Employee Amount” field, enter the amount you want added to your flex spending account each pay period.
  - Don’t forget to add the applicable fee(s).
  - **Important -- the amount you enter in the “Employee Amount” will be per pay period.** In other words, if you put $25 in this field, $50 will be taken out each month because salaried employees at WSU are paid twice a month.

- Click “Add Choice.”

- Repeat the process for the Dependent Care Flex Spending Account.

- Note: If Dependent Care is the only flex spending account you are participating in, be certain to add the $1.00 per pay period administration fee.
Completing Open Enrollment

When you have completed your selections and you are satisfied with your choices you need to click “Complete” to submit your changes, as shown in Figure 14.

**IMPORTANT:** Please don’t forget to click “Complete.”
- Remember you can restart the entire Open Enrollment process at any time by clicking on the “Restart” button.

![Figure 14](image)

- Upon completing the open enrollment process the system will give you a confirmation of your choices and show you your estimated (future) monthly costs for the choices you have already submitted or those you are considering for the next benefit year. See figure 15.

![Figure 15](image)

- At this point you are done with open enrollment and may log out.
You may also view your estimated (future) monthly costs for the next benefit year at any time during the open enrollment process by clicking on “Calculate Cost” as shown in Figure 16 below.

<table>
<thead>
<tr>
<th>Group</th>
<th>Benefits Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health</td>
<td>Pre-Tax EMIA, Medical Insurance for Full Time Employees (FTE =&gt;)</td>
</tr>
<tr>
<td></td>
<td>Pre-Tax Altius Medical Insurance for Full Time Employees (FTE =&gt;)</td>
</tr>
<tr>
<td></td>
<td>Pre-Tax EMIA Dental Insurance for Full Time Employees (FTE =&gt;)</td>
</tr>
<tr>
<td>Flex Spending</td>
<td>Flex Spending - Health Care Expense Reimbursement will be start</td>
</tr>
<tr>
<td></td>
<td>Flex Spending - Dependant Care Expense Reimbursement will be</td>
</tr>
</tbody>
</table>

Figure 16

- When calculating cost, click on the “back to Open Enrollment” at the bottom of the page to go back to the Open Enrollment main menu.

**Dependents**

*If you have changed insurance carriers,* WSU Human Resources would like you to review and revise, if necessary, your dependents. To do this, follow these instructions.

- Click on “Benefits and Deductions” from the Employee Services main menu.

- Click on “Beneficiaries and Dependents.”
Figure 19 (below) shows the “Beneficiaries and Dependents Information” for Waldo the Wildcat.

<table>
<thead>
<tr>
<th>Persons Covered By Your Policies and Benefits</th>
</tr>
</thead>
<tbody>
<tr>
<td>To change information for an individual, click on the Name. Additions can be made by clicking the Breakdown table.</td>
</tr>
<tr>
<td>NOTE: This page does not designate beneficiaries of Life Insurance.</td>
</tr>
</tbody>
</table>

**Beneficiaries and Dependents Information**

<table>
<thead>
<tr>
<th>Name</th>
<th>SSN</th>
<th>Relationship</th>
<th>Birth Date</th>
<th>Gender</th>
<th>College Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wilma Wildcat</td>
<td>Not Reported</td>
<td>Wife</td>
<td>Jan 01, 1967</td>
<td>Female</td>
<td>Does not attend college</td>
</tr>
<tr>
<td>Wally Wildcat</td>
<td>Not Reported</td>
<td>Child</td>
<td>Jan 01, 1996</td>
<td>Male</td>
<td>Does not attend college</td>
</tr>
<tr>
<td>Wanda Wildcat</td>
<td>Not Reported</td>
<td>Child</td>
<td>Jan 01, 1997</td>
<td>Female</td>
<td>Does not attend college</td>
</tr>
</tbody>
</table>

Add a New Person

Figure 19

- Click on the dependent’s name to change information for that individual. Figure 20 shows the screen where information for Wilma Wildcat can be changed. We added her middle initial “T.”

**Updating Beneficiary Information**

Change the beneficiary information as desired and then click the “Submit Changes” button.

- indicates a required field.

First Name:* Wilma
Middle Name or Initial: T.
Last Name:* Wildcat

Figure 20

- Click on “Submit Changes.” Figure 21 reflects the changes made on the previous screen.
• Additional dependents (must be eligible dependents) can be added by clicking “Add A New Person.” If you are uncertain what an “eligible” dependent is, consult WSU Human Resources.

• To end coverage of a dependent (i.e., your son has married, your daughter is employed/is no longer a dependent), click on the name of the dependent under “Benefit Coverage.” Choose the benefit you want to change (“Choose Benefit”) and fill in an “End Date” for each benefit i.e., 07/01/2007 (Figure 22 shows an incorrect end date). Click “Choose” or “Update” at the bottom of the screen.
Things to Remember/Getting Help

This is the fifth time that WSU has done Open Enrollment via the Lynx Self Service feature. Don’t be afraid to ask for help if something is confusing.

If you are having trouble with Open Enrollment, check to see if your question can be answered by this manual. Or, call one of the following if you need additional help:

- WSU Human Resources
  - Travis Hampshire at ext. 6648
  - Cherrie Nelson at ext. 7496
  - RC Callahan at ext. 7710
  - Jennifer Evans at ext. 8534
  - Sarah Rivkind at ext. 6388

- WSU Help Desk at ext. 7777