

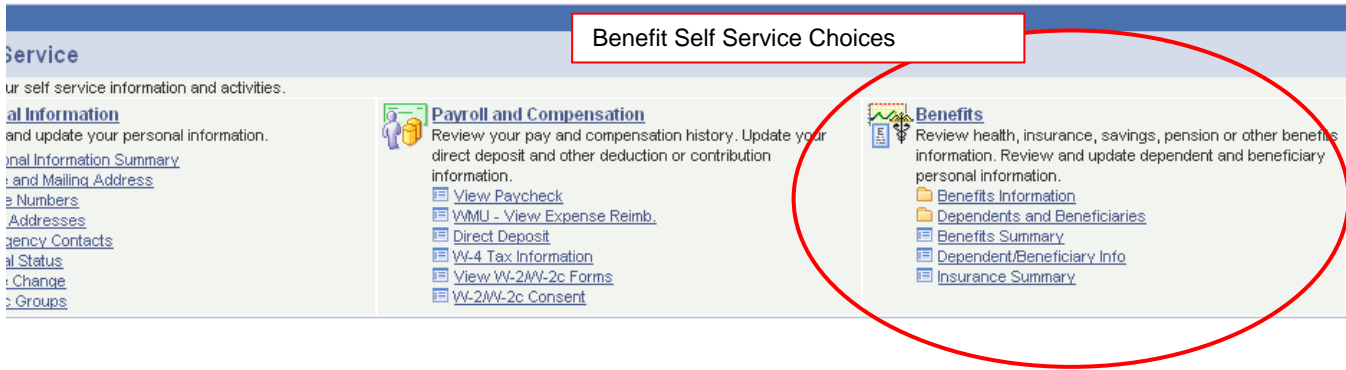
Your Guide to Benefits Self Service

pshr self service

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Review Current Enrollment	
NOTE: A 'Health Insurance Enrollment' form must be completed for any changes in enrollment or dependents. Changes cannot be completed via self service.	
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YOUR GUIDE TO BENEFIT SELF SERVICE



UNDERSTANDING the PAGES - OVERVIEW

When you bring up your benefit elections (by selecting the 'Benefits Summary' panel or the individual plan panels), you are looking at your CURRENT plan elections.

- ① Panels will come up as of 'today's' date and will show the benefit plans for which you are currently enrolled
- ② To see previous or future enrollments, enter a new date and click the 'Go' button

① **Medical/Dental/Vision** Current Date

BB Bronco
To view your benefits as of another date, enter the date and click Go:

Medical/Dental/Vision

Plan Name: PPO - 14/15/18 - 26 pays
Plan Provider: Blue Cross Blue Shield of Michigan
Coverage: Double Coverage
Group Number:
Customer Service: **Ext:**

Covered Dependents

Name	Relationship
BE Bronco	Spouse

② **Medical/Dental/Vision** Future Date

BB Bronco
To view your benefits as of another date, enter the date and click Go:

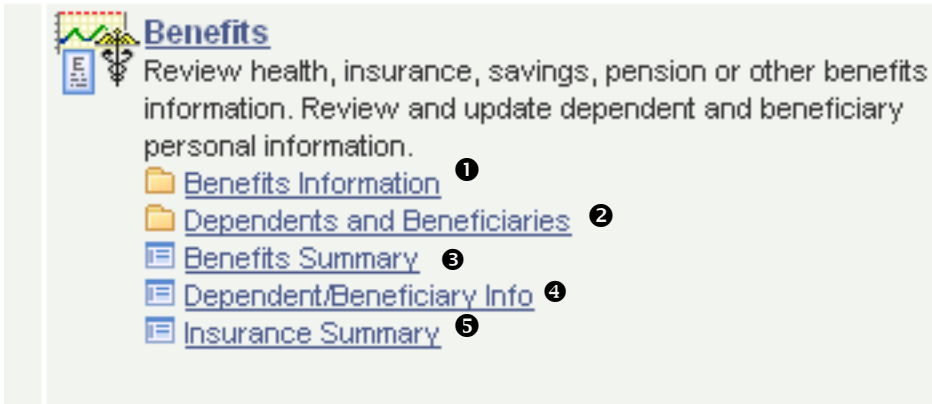
Medical/Dental/Vision

Plan Name: PPO - 14/15/18 - 26 pays
Plan Provider: Blue Cross Blue Shield of Michigan
Coverage: Single Coverage
Group Number:
Customer Service: **Ext:**

Covered Dependents






No dependent/beneficiary enrollments were found.

THE BENEFIT OPTIONS – General information



Benefits

Review health, insurance, savings, pension or other benefits information. Review and update dependent and beneficiary personal information.

-  [Benefits Information](#) ①
-  [Dependents and Beneficiaries](#) ②
-  [Benefits Summary](#) ③
-  [Dependent/Beneficiary Info](#) ④
-  [Insurance Summary](#) ⑤

① Information found in the folder includes:



Health Care Summary
Review a summary of your health care enrollments.



Savings Summary
Review a summary of your savings plan enrollments.


② Information found in this folder includes:



Dependent/Beneficiary Coverage
Review a summary of your dependents and beneficiaries benefits coverage.



Health Care Dependent Summary
Review a summary of your health dependents information.



Insurance Beneficiary Summary
Review a summary of your insurance beneficiaries' coverage.

③ An overview of your current benefit elections and retirement/leave plans

④ Information on your current or previous Health Insurance Dependents or Life Insurance Beneficiaries

⑤ Information on your current or previous Life Insurance and Long-term Disability (LTD).

HOW to READ THE PANELS

Insurance Plan Description/Name: Shown on the Benefits Summary Page and the detailed Plan pages

Summary page

Type of Benefit	Plan Description	Coverage or Participation
Medical/Dental/Vision	PPO - 14/15/18 - 26 pays	Double Coverage
Additional 1 Life	Add1 Life 14/15 \$30K 26 pays	\$30000
Additional 2 Life	Add2 Life 2x Salary - 26 pays	Salary X 2 + 0
Spouse Life	Spouse Life 15/16/18 - 26 pays	See Dependent Covrgs
Basic Life	Basic Life \$100K 26 pays	\$100000
Long-Term Disability	LTD - 15 - 26 pays	66.7% of Salary

Detail page

Medical/Dental/Vision

BB Bronco
To view your benefits as of another date, enter the date and click Go:

09/08/2009

Medical/Dental/Vision

Plan Name: PPO - 14/15/18 - 26 pays

The insurance type

PPO - ~~14/15/18~~ - 26 pays

Indicates the number of pays the employee receives during the year.

Ignore ~ this is for HR internal use

Coverage or Participation: Shown on the Benefits Summary Page and the detailed Plan page

Click on link to get detailed info

Type of Benefit	Plan Description	Coverage or Participation
Medical/Dental/Vision	PPO - 14/15/18 - 26 pays	Double Coverage
Additional 1 Life	Add1 Life 14/15 \$30K 26 pays	\$30000
Additional 2 Life	Add2 Life 2x Salary - 26 pays	Salary X 2 + 0
Spouse Life	Spouse Life 15/16/18 - 26 pays	See Dependent Covrgs
Basic Life	Basic Life \$100K 26 pays	\$100000
Long-Term Disability	LTD - 15 - 26 pays	66.7% of Salary

Medical/Dental/Vision

BB Bronco
To view your benefits as of another date, enter the date and click Go:

09/08/2009

Medical/Dental/Vision

Plan Name: PPO - 14/15/18 - 26 pays

Plan Provider: Blue Cross Blue Shield of Michigan

Coverage: Double Coverage

Group Number: _____

Customer Service: _____ Ext: _____

Covered Dependents

Name	Relationship
BE Bronco	Spouse

Indicates your currently covered dependents

Indicates the amount or type of coverage you currently have.

Benefits Summary

BB Bronco

To view your benefits as of another date, enter the date and click Go:

09/01/2009

Type of Benefit	Plan Description	Coverage or Participation
Medical/Dental/Vision	PPO - 14/15/18 - 26 pays	Double Coverage
Additional 1 Life	Add1 Life 14/15 \$30K 26 pays	\$30000
Additional 2 Life	Add2 Life 2x Salary - 26 pays	Salary X 2 + 0
Spouse Life	Spouse Life 15/16/18 - 26 pays	See Dependent Covrgs
Basic Life	Basic Life \$100K 26 pays	\$100000
Long-Term Disability	LTD - 15 - 26 pays	66.7% of Salary
TIAA/CREF SRA	TIAA-CREF 403b	\$100 Before Tax
Fidelity 457B	Fidelity 457b	10% Before Tax
Sick	Sick Leave	-----
Vacation	Annual Leave - P/A	-----
Flex Spending Health - U.S.	Flex Spending Acct Health Care	\$500 Pledge
Flex Spending Dependent Care	Flex Spending Acct Dep Care	\$300 Pledge
WMU Retirement	TIAA-CREF Immediate Vest 11%	0% of Earnings

Click on the Benefit Type link to see detailed information on your benefit.

Most benefit data is 'view' only. Changes must be made via Enrollment forms and forms returned to HR.

The exception is Life Insurance Beneficiaries. Beneficiaries may be updated online at any time.

Employee's contribution to TIAA-CREF is 0%. Employee contributions are done through tax sheltering.

Go to:

Medical/Dental/Vision

BB Bronco

To view your benefits as of another date, enter the date and click Go:

09/01/2009

Medical/Dental/Vision

Plan Name: PPO - 14/15/18 - 26 pays

Plan Provider: Blue Cross Blue Shield of Michigan

Coverage: Double Coverage

Group Number:

Customer Service: **Ext:**

Covered Dependents

Name	Relationship
BE Bronco	Spouse

Additional Information

[Return to Employee Benefit Summary](#)

LIFE INSURANCES

Basic Life

BB Bronco

To view your benefits as of another date, enter the date and click Go:

09/09/2009 

Basic Life

Plan Name: Basic Life \$100K 26 pays

Plan Provider: The Standard Insurance

Coverage Level: \$100000

Group Number:

Customer Service: Ext:

Covered Beneficiaries

Click Edit to change your current beneficiary allocations. Click the beneficiary's name to edit the individual's personal information.

Name	Relationship	① Primary Allocation	Secondary Allocation ②
Bronco, BE	Spouse	100%	
Mustang, MM	Parent		50%
Bronco, Bunny	Sibling		50%

Total = 100% (Primary Allocation)

Total = 100% (Secondary Allocation)

[Return to Employee Benefit Summary](#)

① Primary Beneficiary and Allocation

- Your primary beneficiary(-ies) are the recipients of any life insurance benefits upon your (the policy owner) death.
 - You may have one or more primary beneficiaries.
- Your primary allocation determines how the benefits are split up among the primary beneficiaries.
 - Each beneficiary must have an allocation
 - Allocations must be whole numbers (e.g. 34%, 33%, 33%)
 - Allocations must total 100 (e.g. 34 + 33 + 33 = 100 or 50 + 50 = 100)

② Secondary Beneficiary and Allocation

- Your secondary (or contingent) beneficiaries will only get the death benefit if both the policy owner and the primary beneficiary (-ies) has/have died.
- Your allocations for secondary beneficiaries follow the same rules as for primary allocations (see above).

To ADD a Beneficiary

Go TO → Benefits → Insurance Summary → Select Insurance Type

Basic Life

BB Bronco

To view your benefits as of another date, enter the date and click Go:

09/08/2009

Go

Basic Life

Plan Name: Basic Life \$100K 26 pays

Plan Provider: The Standard Insurance

Coverage Level: \$100000

Group Number:

Customer Service: Ext:

Covered Beneficiaries

Click Edit to change your current beneficiary allocations. Click the beneficiary's name to edit the individual's personal information.

Name	Relationship	Primary Allocation	Secondary Allocation
Bronco, BE	Spouse	100%	
Mustang, MM	Parent		100%

Edit

[Return to Insurance Summary](#)

New screen appears which shows all active and non-active beneficiaries and the distribution of the benefit.

Allocation Type

Enter Primary Allocations as: Percent

Enter Secondary Allocations as: Percent

Name	Relationship	Current Primary Percent	Current Secondary Percent	New Primary Allocation	New Secondary Allocation
BE Bronco	Spouse	100	Current		
MM Mustang	Parent		100	Current	
Bunny Bronco	Sibling	Non Current			

Update Totals

0

0

Save

[Add a New Beneficiary](#)

STEP 1:
Make sure you are on the Life Insurance panel for which you want to add a beneficiary

STEP 2:
Click the 'Edit' button

List of current and non-current beneficiaries
Non-current beneficiaries do not have a percentage/allocation listed

STEP 3:
If the beneficiary you want to add is not showing in the list, click the 'Add a New Beneficiary' button

STEP 4:

- Complete the Personal Information for your new beneficiary
- Fields with an asterisk "*" must have information entered

Dependent/Beneficiary Personal Information

BB Bronco

Click Save once you have added your Dependent/Beneficiary's personal information. This information will go into effect as of Sep 8, 2009.

Personal Information

*First Name:

Middle Name:

*Last Name:

Name Prefix:

Name Suffix:

*Gender: Male

Date of Birth:

SSN: (Social Security Number)

*Relationship to Employee:

Status Information

*Marital Status: Single As of:

Disabled: No As of:

Address and Telephone

Same Address as Employee

Country: United States

Address: 1903 W Michigan Ave
Kalamazoo, MI 49008

Same Phone as Employee

Phone:

* Required Field

[Return to Change Current Beneficiaries and Allocations](#)

Removing the checkmark from the 'Same Address' box will give you this screen

Address and Telephone

Same Address as Employee

Country: United States [Change Country](#)

Address: [Edit Address](#)

Click 'Edit Address' to enter the beneficiary's address

STEP 4 (continued)

- If the address for the beneficiary is not the same as your address, unclick the 'Same Address' box
- Enter the beneficiary's address at new screen
 - Clicking 'Save' after entering the address will return you to the Beneficiary screen
- Click 'Save' one more time to return to the 'Change Current Beneficiaries and Allocations' screen

Change Current Beneficiaries and Allocations

Basic Life

Basic Life \$100K 26 pays

BB Bronco

To change the allocations for your current beneficiaries, choose an Allocation type. An individual can not be both a primary and a secondary beneficiary. Enter a percent. Click Add a New Beneficiary to add a new beneficiary.

STEP 5

- (Re) Enter the allocation/percent for ALL of your beneficiaries
 - Both Primary AND Secondary allocations
- Allocation totals must equal 100
 - Click the 'Update Totals' button to see total for each beneficiary type
- When all information is entered, click the 'Save' button

Allocation Type

Enter Primary Allocations as:

Enter Secondary Allocations as:

Enter allocations in boxes

Name	Relationship	Current Primary Percent	Current Secondary Percent	New Primary Allocation	New Secondary Allocation
BE Bronco	Spouse	100		<input type="text" value="100"/>	<input type="text"/>
MM Mustang	Parent		100	<input type="text"/>	<input type="text" value="34"/>
Bunny Bronco	Sibling			<input type="text"/>	<input type="text" value="33"/>
Binky Bronco	Sibling			<input type="text"/>	<input type="text" value="33"/>
				<input type="button" value="Update Totals"/>	
				100	100

[Add a New Beneficiary](#)

[Return to Life Insurance Main 2x](#)

STEP 6

- You should see the "Save successful" message after you click the 'Save' button.
- Changes that are immediately effective will be seen on the panels.
- Future dated changes will appear on the effective date. You may also enter the future date in the 'view date' box to see future changes.

Save Confirmation



The Save was successful.



To REMOVE a Beneficiary

Go TO → Benefits → Insurance Summary → Select Insurance Type

NOTE: Dependants/beneficiaries cannot be deleted from the database due to historical data needs. Changing an allocation to zero or blank will remove the person from 'active' beneficiary/dependent status.

STEP 1:
Make sure you are on the Life Insurance panel for which you want to remove a beneficiary

Basic Life
BB Bronco
To view your benefits as of another date, enter the date and click Go:
10/09/2009

Basic Life

Plan Name: Basic Life \$100K 26 pays
Plan Provider: The Standard Insurance
Coverage Level: \$100000
Group Number:
Customer Service: **Ext:**

Covered Beneficiaries
Click Edit to change your current beneficiary allocations. Click the beneficiary's name to edit the individual's personal information.

Name	Relationship	Primary Allocation	Secondary Allocation
Bronco, BE	Spouse	100%	
Mustang, MM	Parent		33%
Bronco, Bunny	Sibling		34%
Bronco, Binky	Sibling		33%

STEP 2:
Click the 'Edit' button

New screen appears which shows all active and non-active beneficiaries and the distribution of the benefit.

Allocation Type
Enter Primary Allocations as:
Enter Secondary Allocations as:

Name	Relationship	Current Primary Percent	Current Secondary Percent	New Primary Allocation	New Secondary Allocation
BE Bronco	Spouse	100		<input type="text"/>	<input type="text"/>
MM Mustang	Parent		33	<input type="text"/>	<input type="text"/>
Bunny Bronco	Sibling		34	<input type="text"/>	<input type="text"/>
Binky Bronco	Sibling		33	<input type="text"/>	<input type="text"/>

0 0

[Add a New Beneficiary](#)

[Return to Life Insurance Main 2x](#)

STEP 3

- Enter new allocation/percent for ALL of your beneficiaries
 - Both Primary AND Secondary allocations
- Allocation totals must equal 100
 - Click the 'Update Totals' button to see total for each beneficiary type
- When all information is entered, click the 'Save' button

Name	Relationship	Current Primary Percent	Current Secondary Percent	New Primary Allocation	New Secondary Allocation
BE Bronco	Spouse	100		100	
MM Mustang	Parent		33		
Bunny Bronco	Sibling		34		50
Binky Bronco	Sibling		33		50
Update Totals				0	0

[Add a New Beneficiary](#)

Save

Save Confirmation

✓ The Save was successful.

OK

STEP 4

- You should see the "Save successful" message after you click the 'Save' button.
- Changes that are immediately effective will be seen on the panels.
- Future dated changes will appear on the effective date. You may also enter the future date in the 'view date' box to see future changes.

Name	Relationship	Current Primary Percent	Current Secondary Percent	New Primary Allocation	New Secondary Allocation
BE Bronco	Spouse	100			
Bunny Bronco	Sibling		50		
Binky Bronco	Sibling		50		
MM Mustang	Parent				
Update Totals				0	0

[Add a New Beneficiary](#)

Save

[Return to Life Insurance Main 2x](#)

Click this link to return to the insurance panel to verify new allocations and removal of beneficiary

DEPENDENT AND BENEFICIARY PERSONAL INFORMATION



Dependent and Beneficiary Personal Information

BB Bronco

The people listed below are current or previous dependents/beneficiaries. Please note that previous dependants/beneficiaries cannot be deleted due to historical data needs.

Please click on a name to view or modify their personal information.

Dependent Information						
Name	Relationship to Employee	Date of Birth	Marital Status	Marital Status Date	Student	Disabled
BE Bronco	Spouse	01/01/1967	Married		No	<input type="checkbox"/>

Beneficiary Information		
Name	Relationship to Employee	Date of Birth
MM Mustang	Parent	
Bunny Bronco	Sibling	
Binky Bronco	Sibling	

[Dependent/Beneficiary Coverage Summary](#)

To see what coverages your dependents and/or beneficiaries have, click the 'Summary' link.

This relates to Tuition Remission at WMU for your dependent.

- If the field has 'No', your dependent is not currently enrolled in the tuition remission program and HR does not have current application on file.
- If the field has 'Yes', then HR has a current Tuition Remission application and the dependent is enrolled in the Tuition Remission Program.
- This does NOT mean your dependent/student is enrolled in classes at WMU.

This panel shows your current (active) and previous (inactive) dependents and beneficiaries. The panel is separated into Dependent (who may also be a beneficiary ~ this does not show in this panel) and Beneficiary status.

PLEASE NOTE: Dependents and beneficiaries CANNOT be deleted or removed due to historical data needs.

To add or change personal data on a dependent or beneficiary (e.g. home address, name, SSN, birth date):

- Click on the person's name.
- At the Edit panel, scroll down to the bottom of the page and click the 'Edit' button to make changes or add info.
- Click 'Save' at the bottom of the panel when done with entry.

Dependent and Beneficiary Coverage Summary

BB Bronco

To view your benefits as of another date, enter the date and click Go:

10/21/2009

Go

Change Date to see future or previous enrollments

Dependent/Beneficiary Name	Relationship	Type of Benefit	Description
1 BE Bronco	Spouse	Medical/Dental Vision Additional 1 Life Spouse Life Basic Life	PPO - 14/15/18 - 26 pays Add1 Life 14/15 \$30K 26 pays Spouse Life 15/16/18 - 26 pays Basic Life \$100K 26 pays
2 MM Mustang	Parent	Additional 1 Life	Add1 Life 14/15 \$30K 26 pays
3 Bunny Bronco	Sibling	Additional 1 Life Basic Life	Add1 Life 14/15 \$30K 26 pays Basic Life \$100K 26 pays
Binky Bronco	Sibling	Basic Life	Basic Life \$100K 26 pays
4 Sally Mustang	Sibling		

[Return to Dependent/Beneficiary Summary](#)

ACTIVE Dependents or Beneficiary plan enrollments appear in the right hand columns. BE Bronco, MM Mustang, Bunny Bronco, and Binky Bronco are all active as a dependent and/or a beneficiary.

INACTIVE Dependents or Beneficiaries (e.g. those who are no longer covered on health insurance or are no longer a beneficiary) have show no benefit plan listed. SALLY MUSTANG is an INACTIVE Dependent/Beneficiary.

- 1 BE Bronco is a dependent in the Health Insurance plan and is a beneficiary for Additional 1, Spouse and Basic Life insurances.
- 2 MM Mustang is a beneficiary for Additional 1 Life insurance.
- 3 Bunny Bronco is a beneficiary for Additional 1 and Basic Life insurances.
- 4 Sally Mustang is not an active dependent or beneficiary ~ no insurance plans are showing for her. She may have been a previous dependent/beneficiary, and her data is needed for historical purposes.

Life Events – Status Change Checklist

Use this checklist for events such as marriage, birth of a child, or divorce to ensure your insurance, financial and personal information are up to date.

NOTE: Health Insurance dependents MUST be enrolled within thirty-one (31) days of the event.

What To Do		Where / What
Review Your Life Insurance Benefits	<input type="checkbox"/>	Check Current Benefit Enrollments on Employee Self Service
<ul style="list-style-type: none"> ⇒ Basic Life Beneficiaries ⇒ Additional 1 Life Beneficiaries ⇒ Additional 2 Life Beneficiaries ⇒ Spouse Life ⇒ Child Life 	<input type="checkbox"/>	<p>Log into GoWMU with your BroncoNet ID & Password. Find the 'My Self Service' channel & select 'Employee Self Service' Self Service Guide Link: http://www.wmich.edu/hr/self-service/index.html</p>
Review Your Health Insurance Dependents	<input type="checkbox"/>	<p>In Employee Self Service – Benefits Information Section If changes are needed, complete a 'Health Insurance Enrollment Form' Web site: http://www.wmich.edu/hr/forms.html</p>
<ul style="list-style-type: none"> ⇒ Addition of Spouse after marriage ⇒ Removal of Spouse after divorce ⇒ Addition of Child after birth/adoption 		<p>NOTE: Enrollment IN health insurance must take place within in 31 days of the marriage/birth/adoption</p>
Update Personal Information	<input type="checkbox"/>	In Employee Self Service – Personal Information Section
<ul style="list-style-type: none"> ⇒ Home Address ⇒ Phone Numbers ⇒ Emergency Contacts ⇒ Name Change 	<input type="checkbox"/>	<p>If Questions: Human Resources Room 1300 Administration Bldg 387-3620 Hr-hris@wmich.edu</p>
Review Your W-4 Tax Information	<input type="checkbox"/>	In Employee Self Service – Payroll Information Section
Review Your Retirement Beneficiaries	<input type="checkbox"/>	<p>Visit the TIAA-CREF or MPERS Web sites: http://enroll.tiaa-cref.org/wmich/ http://www.michigan.gov/orsschools</p>