

Access.SMU Employee Self-Service Benefits Enrollment Guidelines

2010 Open Enrollment will be completed in Access.SMU Employee Self-Service. Once logged in to access.smu.edu, complete the following steps:

1.	Under Employee Self-Service on the right side of the page, click the Benefits link. Benefits
2.	Click the Benefits Enrollment link. Benefits Enrollment
3.	From the Benefits Enrollment page, you have access to the 2010 Benefits Guide.
	Please review the 2010 Benefits Guide. Use the Click Here link for detailed information regarding SMU's Benefit Plans. Click Here
4.	After reviewing the Benefits Guide, click the (close button) to return to the Benefits Enrollment page.
5.	Click the Select button to begin the Open Enrollment process.
	Select
6.	IMPORTANT: Beneficiary Designations will not be entered via Access.SMU so please ignore any references to "Beneficiary" throughout the Open Enrollment module. If you wish to update your 403(b) beneficiaries please call the investment company you selected. If you wish to change your Life Insurance beneficiaries, call Reliance Standard (800-644-1103).
7.	From the Open Enrollment page, you will have the opportunity to change, waive, or select new coverage in each of the Benefits categories listed. Note: At the bottom of the page, you may see the "I Have No Changes" button. Do
	NOT use this button. Hav No Charges Worm annual transfer will not be complete with your click the Submit button when your
	Your enrollment will not be complete until you click the Submit button when you finish making all of your elections. Submitting your enrollment is the last step in the enrollment process.
8.	Click the Edit button to select Medical election.



9.	You will find a link to the Medical pages of the Benefits Guide. Use the Click Here link. You will also see the Medical options available and the premium rates for each.
	This icon displays important information about your coverage of which you should be aware.
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10.	Please note the following Medical Election requirements: IMPORTANT: If you are currently enrolled in:
	The Aetna HMO, you must elect a new medical option for 2010
	• 2009 Coverage Level Employee + 1 for yourself and a spouse, you must change your 2010 Coverage Level to Employee & Spouse
	• 2009 Coverage Level Employee + 1 for yourself and a child, you must change your 2010 Coverage Level to Employee + Child(ren)
	2009 Coverage Level Family for yourself and child(ren) only, you must change your Coverage Level to Employee + Child(ren)
	Simply check the box next to the Medical option you wish for 2010 and then reenroll your spouse and/or dependent children by checking the box next to their name. You will automatically be enrolled in the appropriate Coverage Level based on the dependents you enroll.
11.	Click the desired Medical Plan or Waive button.
12.	At the bottom of the page is a list of dependents eligible for enrollment.
	Important : If you are currently enrolled in a BCBSTX PPO option that requires a new election due to the new Coverage Level structure, be sure to check all of the dependents you want to enroll for 2010.
	To select a currently eligible dependent, check the Enroll checkbox next to the dependent(s) name.

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13.	If adding new dependents, click the Add/Review Dependents button. You will then be directed to the Enrollment Dependent Beneficiary Summary page.
	There, click the Add a Dependent or Beneficiary link at the top of the page. Complete the Dependent Personal Information page.
	Once completed, click Save. A Save Confirmation message will be displayed. Click OK to return to the Dependent Personal Information page.
	Click the Return to Enrollment Dependent/Beneficiary Summary link. To add additional dependents, click the Add a Dependent or Beneficiary link. Once you have completed your dependent elections click the Return to Event Selection link to continue.
	Note: Dependents are not added to your coverage until you check the Enroll checkbox next to their name(s) at the bottom of the page.
14.	Click the Continue button to store your election. Continue
15.	A summary of your Medical election will be displayed. Click the OK button to proceed to the Enrollment Summary .
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	(If you enroll in the \$2,500 Deductible PPO and click Continue , the Health Savings Account option should open automatically. Proceed to Step 42 .)
16.	Click the Edit button to make your Dental election.
17.	Click the Dental button if you wish to enroll or the Waive button if you don't. Add dependents or cancel as needed.
18.	Click the Continue button to store your election. Continue
19.	A summary of your Dental election will be displayed. Click the OK button to proceed to the Enrollment Summary .
20.	Click the Edit button to make your Vision election.
21.	Click the Vision button if you wish to enroll or the Waive button if you don't. Add dependents or cancel as needed.
22.	Click the Continue button to store your election. Continue
23.	A summary of your Vision election will be displayed. Click the OK button to proceed to the Enrollment Summary .

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24.	Click the Edit button to make your Supplemental AD&D election.
25.	Click the appropriate Coverage Level or the Waive coverage option.
26.	If you are currently enrolled in the AD&D plan, you will see your current coverage amount displayed. Enter a new Coverage Amount if needed.
27.	Click the Continue button to store your election.
28.	A summary of your AD&D election will be displayed. Click the OK button to proceed to the Enrollment Summary .
29.	Click the Edit button to make your Flex Spending Health - U.S. election (Health Care Flexible Spending Account).
30.	IMPORTANT:
	 If you are currently enrolled and do not make a new election, your Health Care FSA will be cancelled for 2010. You can contribute up to \$5,000 but if you are married and your spouse is also an SMU employee, your combined annual Health Care FSA maximum is \$5,000. If you enrolled in the \$2,500 deductible PPO option, you are not eligible for the
	Health Care FSA option. However, the Health Savings Account is available for you to use.
31.	Click the Health Care - FSA or No, I Do Not Want to Enroll button
32.	Enter an Annual Pledge if you selected the Health Care - FSA option. Then, click the Worksheet link to calculate and view both your pay period contributions and annual pledge. The top yellow button toggles between the two views. Upon completion of the worksheet click the Return link.
33.	Click Continue to store your election.
34.	A summary of your Health Care FSA election will be displayed. Click the OK button to proceed to the Enrollment Summary .
35.	Click the Edit button to make your Flex Spending Dependent Care election.
	Note: As a reminder, the Dependent Care FSA is available for reimbursement of eligible dependent <u>daycare</u> expense, not for dependent healthcare expenses. The Health Care FSA can be used for reimbursement of eligible dependent healthcare expenses.
36.	Click Dependent Health Care - FSA or No, I Do Not Want To Enroll button.

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37.	Enter an Annual Pledge if you selected the Dependent Care - FSA . Then, click the Worksheet link to calculate and view both your pay period contributions and annual pledge. The top yellow button toggles between the two views.
	Upon completion of the worksheet click the Return link.
38.	Click Continue to store your election. Continue
39.	A summary of your Dependent Care FSA election will be displayed. Click the OK button to proceed to the Enrollment Summary .
40.	IMPORTANT:
	You may enroll in the Health Savings Account <u>only</u> if you enroll in the \$2500 Deductible PPO administered by BCBSTX.
	• If you enroll in the \$2,500 Deductible PPO – Employee Only, you can elect to contribute up to \$3,050 to your HSA for 2010.
	• If you enroll in the \$2,500 Deductible PPO – Employee + Spouse, Employee + Child(ren), or Family, you can elect to contribute up to \$6,150 to your HSA.
	• If you are age 55 or older, you are eligible to make an additional \$1,000 "catch-up" contribution.
41.	If you enrolled in the \$2,500 Deductible PPO and have entered your annual HSA contribution amount, proceed to step 46.
	If you enrolled in the \$2,500 Deductible PPO option and have <u>NOT</u> entered your annual HSA contribution amount, click the <u>Edit</u> button for the \$2,500 Deductible PPO/HSA option (Health Savings Account).
	Edit
42.	Click No, I Do Not Want To Enroll or the Health Savings Account button.
43.	If you elect the Health Savings Account , enter your annual contribution amount, which will be prorated and deducted on a per pay period basis.
44.	Click the Continue to store your election. Continue
45.	A summary of your HSA election will be displayed. Click the OK button.
	(If the HSA election was made immediately upon selecting the \$2,500 Deductible PPO, return to step 16 to select your remaining elections.)



46.	At the bottom of the Open Enrollment page a summary of the premiums for your 2010 elections will be displayed. Important: Be sure to print a copy of the Summary before you click the Submit button.
	Upon review, click Submit to finalize your enrollment. If you do not click Submit any elections that require a positive election will be cancelled for 2010. Submit
47.	Once you click submit you will see a summary of all of your elections for 2010. You will see a link to a very brief survey. Your feedback is very important so please take a minute or two to provide any suggestions for future Access.SMU Open Enrollments.
48.	End of Procedure.

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