Benefits (ESS): Make Benefit Elections Using BearTrax
All Employees

Introduction

Purpose:
The purpose of this task is for you to manage, change and/or submit your benefit elections using BearTrax.
To request a password, you'll email beartrax@shawnee.edu.
To access BearTrax, you'll visit: www.shawnee.edu/beartrax.

How to Access:

Go to the Home Screen by clicking the icon.
Click the Icon.
Under “Me,” click “Benefits.” This will take you to the Benefits screen.

Navigator

Me

Directory
Personal Information

Benefits

Personal Brand
Expenses
Time
Absence

From this screen, you can view, change, and submit your benefit elections while in an enrollment period or when a life event has been recorded.
Helpful Hints:

Be sure to keep in mind that…

- You can see how changes you make to your elections will affect the total cost to you as you go through the benefits enrollment process.
- You must adhere to the enrollment guidelines set by Human Resources.
- Important! Be sure to add family members and other beneficiaries as contacts before you make your elections.
- In your Benefits pages, the term "Contacts" references your dependents and beneficiaries to be covered.

Procedure:

Complete the following steps to change and submit your benefit elections:

Change your Benefit Elections

Follow these instructions to change your benefit elections:

1. Click “Change Benefit Elections.”

2. Edit your current contacts (dependents/beneficiaries) or add new contacts from here.

Create or Edit Contacts for Benefits Coverage
Follow these instructions to create or edit your contact for benefits coverage:

To create a contact:

Click “Create Contact” to add a family member as a dependent or beneficiary.

Note: If your contact is an existing employee, please refer to the Personal Information: Edit Contacts Job Aid.

View the Create Contact page.

Enter all required information to create the contact if they do not already exist in your contacts.

Gender, Date of Birth, and National ID are required information for all Dependents.

Disability Status is required for Dependents 26 and older.
Complete all required fields marked by *.

Click “Save” at the top right corner.

View contacts’ information on contact card. To update contact information, click on the contact’s name and make the change.

If current data is incorrect, contact Human Resources to update.

Any changes made to information for contacts will be effective from the date submitted.

Fill out the required fields, as marked by an *.

Click “Save.”

If you wish to add a Trust/Estate as a beneficiary, click the Beneficiary Organization link on the left side of the screen.
To continue to select or edit your Benefit Elections, click “Continue.”

**Edit Beneficiary Organizations**

Click “Beneficiary Organizations” on the left side of the screen.

Click “Add Trust/Estate” to begin the steps to add a new Beneficiary.

Enter the Start Date in the appropriate format.
Select the Beneficiary Type.

If you are entering an Existing Organization:

Choose the Name from the drop-down menu displayed.

Click “Save.”

If you are entering a Trust/Estate:
Enter information into the required fields.

Click “Save.”

Note: If you wish to designate a contact as a beneficiary of your benefit elections, you must go through the Change Benefit Elections process and designate them before finalizing enrollment changes. This can only occur during annual enrollment periods or when you report a life event. See Edit Your Benefit Selections.

Click “Continue” once you have returned to the Edit Beneficiary Organizations page to proceed to the Edit Benefits process and make or change your benefit elections.

Click “Continue Enrollment” in the warning box if you have already entered your dependents in the contacts section.

Note: The authorization statement notifies all employees that:

By enrolling in benefits, you are authorizing Shawnee State University to take deductions from your paycheck to pay for your cost of coverage. You are also authorizing the Benefits Office to send necessary personal information to your selected providers to initiate and support your coverage.

Read the authorization statement. If you disagree, you may not move on to make benefit elections.

Click “Accept” to continue.
Edit Your Benefit Selections

Follow these instructions to edit your benefit selections:

**Note:** Be sure to refer to the information icon located beside the section title to learn more about each benefit and the options available to you.

**Medical Options:**

1. Choose the plan and options in which you wish to enroll.
2. First, click the “Select” icon for the Medical Benefit option of your choice.
3. Click “Next.”
   
   i. **Note:** Your current year elections and costs will be displayed as you move through the train stops.
4. Click “Next.”
HSA Options:

5. If you selected the Luminos High Deductible plan, click the “select” icon for the Health Savings Account (HSA) Benefits option you wish to elect.
   a. Your current year election will default.

6. Enter the annual amount you wish to contribute in the “coverage” box.

7. Click “Next.”

FSA Options:

8. Click the “select” icon for the Flexible Spending Account (FSA) benefit option you wish to elect.
   a. PPO participants have the option to enroll in the FSA or a Dependent Care FSA.
   b. HDHP Participants have the option to enroll in a limited-purpose FSA or a Dependent Care FSA.

9. Enter the annual amount you wish to contribute in the “coverage” box.
   a. Your current year election will default.
10. Click “Next.”

Employer Paid Benefit Options:

11. View the Employer Paid benefits—these elections cannot be changed. You can designate beneficiaries on the Designations page.

12. Click “Next.”

Voluntary Life and AD&D Options:

13. Click the “select” icon for the Voluntary Life and AD&D benefits you wish to select for enrollment.
a. Your current year elections will default.

14. Enter the coverage amount you wish in the “coverage” box.

15. Click “Next.”

Disability Options:

16. Click the “select” icon for the Disability benefits you wish to select for enrollment.

   a. Your current year elections will default.
17. Click “Next.”

Designations Options:

18. In the designation train stop, select the checkboxes for the Designations you wish to select as eligible dependents and beneficiaries to be covered by your benefit elections.

19. Click “Next” to proceed to the Review page of the Benefit Elections process.

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Plan Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical</td>
<td>Lawrence High Deductible Plan - Single</td>
</tr>
<tr>
<td>Flexible Spending Account</td>
<td>FSA Healthcare - Waive Coverage, FSA Limited Purpose - Waive Coverage, FSA Dependent Care - Waive Coverage</td>
</tr>
<tr>
<td>Basic Life and AD&amp;D</td>
<td>Basic Life and AD&amp;D</td>
</tr>
<tr>
<td>Employee Assistance Program</td>
<td>Employee Assistance Program</td>
</tr>
<tr>
<td>Voluntary Life and AD&amp;D - Employee</td>
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</tr>
</tbody>
</table>

21. If you need to make additional revisions, click the “back” button or go directly to each page by clicking the benefit title.

22. Click “Next” to return to review page after revisions are complete.

23. Read the Authorization Statement at the bottom of the review page.
   
   a. If you agree with the statement, you may scroll back to the top of the review page and move on to submit your elections.

24. Click “Submit” to submit your benefit selections.
25. You can now review your confirmation page.

<table>
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</tr>
</thead>
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<tr>
<td><strong>Medical</strong></td>
</tr>
<tr>
<td>- Enrolled Plan: Lumenare High Deductible Plan - Single</td>
</tr>
<tr>
<td>- Coverage Start Date: 1/1/18</td>
</tr>
<tr>
<td>- Employee Per Pay Period Pre-Tax Amount: 10.00</td>
</tr>
<tr>
<td>- Employee Per Pay Period After Tax Amount: 10.00</td>
</tr>
<tr>
<td><strong>Health Savings Account</strong></td>
</tr>
<tr>
<td>- Enrolled Plan: Health Savings Account - Elective Contribution</td>
</tr>
<tr>
<td>- Coverage Start Date: 1/1/18</td>
</tr>
<tr>
<td><strong>Flexible Spending Account</strong></td>
</tr>
<tr>
<td>- Enrolled Plan: FSA Healthcare - Waive Coverage</td>
</tr>
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</tr>
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**Final Notes**

By following these steps, you have successfully made changes or submitted benefit elections.