



NE Washington Information Service Center (NEWISC)

Skyward OIC Data Extract

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Introduction

To assist in accommodating the Year 2 - OIC Request for K-12 Health Benefit Data, WSIPC has created an interface in Skyward that will allow each district to create an extract, specific to its data.

The interface and extract process provides the ability to extract the appropriate data, and create and populate that data into the six .CSV files. This provides the district with full control over the parameters for the data contained in the extract as well as the ability to generate the extract files at any time.

The due date for the OIC Data Collection is May 31, 2014.

Configuring the Generate OIC Extract Data Screen

Menu Path: Web Human Resources\Federal/State Reporting\Federal/State Reporting\Washington State Reporting\State Reports\Office of the Insurance Commissioner Report\Extract Office of the Insurance Commissioner Data

Below is an example of the configured **Generate OIC Extract Data** screen

Generate OIC Extract Data

* Report Year: Use Insurance Tracking to Setup OIC data

* Export Directory:

Choose Salary Negotiations Plan to Report From

* Plan Year: * Select Salary Negotiations Plan:

Payroll Selection

Payroll Method: Dates Select Payrolls

Select Payrolls:

Seq ID	Check Date	Check Type
*None Selected		

* Check Date Range: to

Vendor Payments

Medical Plans [Coverage Category Cross-Reference:](#)

Medical Plans

Carrier Name ▲	Plan Code	Plan Name	Approved Plan Name
▶ WEA Easy Choice Plan	WEAEASY	WEA Easy Choice Plan	
▶ WEA Select Plan 2	Plan 2	WEA Select Plan 2	
▶ WEA Select Plan 3	Plan 3	WEA Select Plan 3	
▶ WEA Select Plan 5	Plan 5	WEA Select Plan 5	

The **Generate OIC Extract Data** interface allows data to be specified to accommodate the following fields and areas. Below is detailed information regarding how to enter data into the interface.

Report Year

This field identifies the report year for this year's extract. Enter **2013**

* Report Year:

Use Insurance Tracking to Setup OIC data

Check this box if your district uses Insurance Tracking. Leave this box unchecked if your district doesn't use Insurance Tracking but instead uses the Payroll Deduction and Benefits to track insurance related costs. If this box is checked, the **Coverage Category Cross-Reference** link appears towards the bottom of the **Generate OIC Extract Date** screen.

Use Insurance Tracking to Setup OIC data

NOTE	Districts that have some employees in Insurance Tracking and have other employees that only utilize the Payroll Deduction and Benefits to identify their insurance coverage will be required to choose one of these configuration settings for the extract. In this case manual manipulation will be required within the CSV files.
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Export Directory

This identifies the location of the generated .CSV files. Please note that this must be a UNC path. This means that it **cannot** be a directory on your computer but instead the directory must be accessible by the print queue server.

Example Export Directory:

* Export Directory:

Test the file once the Salary Negotiations Plan, Check Date Range Start and End Date, and Vendor Payment information has been entered. The **Test** process validates the export directory. A report is generated in the **Print Queue** indicating whether the directory was found.

Choose Salary Negotiations Plan to Report From Plan Year

This field identifies the plan year for which the Salary Negotiation plans will be selected. Enter **2013**.

* Plan Year:

Select Salary Negotiations Plan

Select the Salary Negotiations Plan that the extract will run against. This should be the S-275 Plan used for your district's initial S-275 submission for 2013-14. If your district has more than one S-275 plan, select the combined plan that was used to report the initial S-275.

* Select Salary Negotiations Plan:
*S-275 2013-2014

Payroll Selection

Payroll Method: Dates or Select Payrolls

Select **Dates** to enter the **Check Date Range** of checks to be included in the extract.

Payroll Selection
Payroll Method: Dates Select Payrolls
* Check Date Range: 09/01/2013 to 09/30/2013

Select **Select Payrolls** to enable the * **Select Payrolls** button and choose specific payrolls. Click the ***Select Payrolls** button.

Payroll Selection
Payroll Method: Dates Select Payrolls
* Select Payrolls
Check Date Range: [] to []
Table with columns: Seg ID, Check Date, Check Type. Content: None Selected

The **Payroll Selection Browse** appears with a list of payrolls. Click the check box in the **Select** column to select the payroll and then click **Save**.

Payroll Selection Browse
Display Check Types: Regular Quick Void Manual Manual Void
Sort Order: Check Date Payroll Sequence ID
Views: Historical Payroll Runs Filters: *Skyward Default
Save
Table with columns: Check Date, Payroll Posting Date, Retire Posting Date, Payroll Sequence ID, Low Check Number, High Check Number, Low Deposit Number, High Deposit Number, Check Type, Select
Row 9: 09/30/2013, 09/30/2013, 09/30/2013, 530, 101080, 101084, 900000325, 900000332, Regular,

The paycheck(s) or payroll(s) containing premiums for October coverage of the current fiscal year must be selected. For example, if a district prepays premiums by paying

October premiums through September payroll, the September payroll data should be selected.

Vendor Payments

Medical, Dental, Vision Vendor Selection

This area allows each vendor that received payment for medical, dental or vision premiums in the previous (2012-13) fiscal year to be selected.

- Click **Medical, Dental, Vision Vendor Selection**. Click **Add** and the **Medical, Dental, Vision Vendor Payment Maintenance** screen appears. Use the ***Vendor** link to select a vendor from the list or just begin typing the vendor name into the **Vendor** field. Enter the **OIC Official Carrier Name**. See the below note for the OIC Official Carrier Names.
- **Save** each individual record and add additional records as necessary.

Medical, Dental, Vision Vendor Payment Maintenance

* Vendor: WEA SELECT PLANS MEDICAL WEA SELE002 Save

OIC Official Carrier Name: Premera Back

NOTE	The OIC Official Carrier Names are:
	<ul style="list-style-type: none">• Aetna• Group Health• Kaiser• KPS• PEBB• Premera• Providence• Regence• UHC• Other

The official carrier names are only required for medical vendors.

- When finished adding all vendors for medical, dental and vision click **Save Vendor List** from the **Medical, Dental, Vision Vendors** screen.

Medical, Dental, Vision Vendors

Medical, Dental, Vision Vendors

Alpha Key ▲	Vendor	Carrier Name
WEA SELE000	WEA SELECT PLANS DENTAL	Premera
WEA SELE001	WEA SELECT PLANS VISION	Premera
WEA SELE002	WEA SELECT PLANS MEDICAL	Premera

Save Vendor List Back

NOTE

Premium amounts for Medical, Dental and Vision vendors should not include Cobra payments. Districts that do not use separate vendor codes for Cobra payments will need to manually subtract those amounts from the Section 3 CSV file.

HCA Carveout and Supplemental Vendor Selection

This area allows districts to select insurance related vendors that the district paid HCA Carveout and Supplemental medical fees to in the previous (2012-13) fiscal year.

- Click **HCA Carveout and Supplemental Vendor Selection**. Click **Add** and the **HCA Carveout and Supplemental Vendor Payment Maintenance** screen appears. Use the ***Vendor** link to select a vendor from the list or just begin typing the vendor name into the **Vendor** field. The **OIC Official Carrier Name** is not required for these vendors.
- **Save** each individual record and add additional records as necessary.

- When finished click **Save Vendor List** from the **HCA Carveout and Supplemental Vendors** screen.

Alpha Key	Vendor	Carrier Name
WASHINGTON001	WASHINGTON STATE TREASURER	

Medical Plans**Coverage Category Cross-Reference**

This link is only displayed if the check box **Use Insurance Tracking to Setup OIC data** is checked. If your district doesn't use Insurance Tracking you can move to the **Medical Plans** section below. The **Coverage Category Cross-Reference** area is used to create a mapping of each Insurance Tracking Coverage Code to its **State OIC Code** as defined by OIC.

- Click the **Coverage Category Cross-Reference** link. The **Coverage Codes** screen appears. Highlight the coverage code record and click **Edit**.

Coverage Code	Description	Coverage Type	Reduce Pool	St	
▶ c	Ch	Single			Edit
▶ Covr	Unknown	Single			Delete
▶ E	Emp	Single		Er	Back
▶ EC	Emp, Ch	Family		Er	
▶ ES	Emp, Sp	Family		Er	
▶ ESC	Emp, Sp, Ch	Family		Er	
▶ s	Sp	Single			
▶ sc	Sp, Ch	Single			

- Within the **Coverage Code Maintenance** screen select the appropriate **State OIC Code** and click **Save**.

Coverage Code Maintenance

Coverage Code

Coverage Code: E

* Description: Emp

* Coverage Type: Single Family

Reduce Pool Only

State OIC Code: **EE - Employee Only**

Save

Back

- Repeat this process and when finished click **Back**.

Medical Plans

This area allows districts to identify either the Medical Plans to be included when using Insurance Tracking, or the Payroll Deduction and Benefit codes and their coverage-tier dollar amounts when using the Payroll Deductions and Benefits.

- Click **Add** within the **Medical Plans** area.
- Within the **Medical Plan Maintenance** screen:
 - Enter the **Carrier Name**. This identifies the insurance carrier name that your district defines.
 - Enter the **Plan Code**. This identifies the Plan Code that your district defines for this carrier. Insurance Tracker users may want to use the IT Plan Code and districts that don't use Insurance Tracker may want to use the Ded/Ben code.
 - Enter the **Plan Name**. This identifies the user defined Plan Name associated to this plan and carrier.
 - The **Approved Plan Name** is not needed and can be left blank.
 - Click **Save and Add Again**. Continue adding plans and when finished click **Back**.

Medical Plan Maintenance

Carrier Name:

* Plan Code:

* Plan Name:

Approved Plan Name:

- Within the **Medical Plans** area, highlight the first record and use the caret to expand the Medical Plan record.

Medical Plans [Coverage Category Cross-Reference:](#)

Carrier Name ▲	Plan Code	Plan Name	Approved Plan Name	
WEA Easy Choice Plan	WEAEASY	WEA Easy Choice Plan		<input type="button" value="Add"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>

- Do one of the following:
- If your district doesn't use Insurance Tracking and the **Use Insurance Tracking to Setup OIC data** is not checked, click **Add Deduction/Benefit**.
 - Enter the **Deduction Code** and **Benefit Code** associated with this medical plan.
 - Within the **Coverage Tier** area, fill in the premium rates.
 - **E2** and **F2** are for districts that break out their coverage tiers to an additional level. This is uncommon; if it is not applicable to your district leave the value at 0.0000.
 - Click **Save** and follow the same process for each medical plan.

Deduction/Benefit Information

Deduction Code: MEDICAL-WEA/APA

Benefit Code: MEDICAL-WEA/APA

Coverage Tier

EE(Employee Only):

ES(Employee plus Spouse):

EC(Employee plus Children):

EF(Employee plus Family):

E2(Employee plus 2):

F2(Employee plus Spouse plus 2):

- If your district uses Insurance Tracking and the **Use Insurance Tracking to Setup OIC data** is checked, click **Add Insurance Plan**.
 - Click the insurance plan(s) that is associated with this **Carrier Name** medical plan record and click **Select**. If you are using a separate minimum deduction plan, make sure you select that plan in addition to the primary benefit plan.

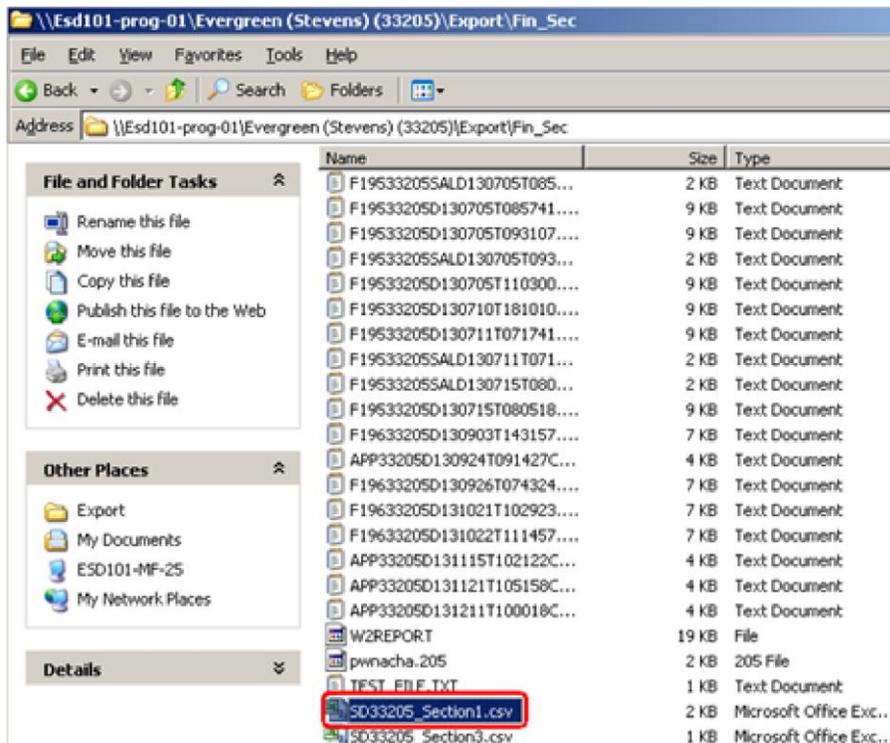
Plan	Description	Insurance Company	Invoice Type	Start Date	End Date	Use FTE	Age Based	E
▶ DENTAL	DENTAL	WEA SELECT PLANS DENTAL	Regular	10/01/2013				
▶ PLAN 2	WEA SELECT PLAN 2	WEA SELECT PLANS MEDICAL	Regular	10/01/2013				
▶ PLAN 3	WEA SELECT PLAN 3	WEA SELECT PLANS MEDICAL	Regular	10/01/2013				
▶ PLAN 5	WEA SELECT PLAN 5	WEA SELECT PLANS MEDICAL	Regular	10/01/2013				
▶ PLAN3MD	PLAN 3 MINIMUM DEDUCTION	WEA SELECT PLANS MEDICAL	Regular	10/01/2013				
▶ VISION	VISION PLAN A	WEA SELECT PLANS VISION	Regular	10/01/2013				
▶ WEAEAMD	WEA EASYCHOICE MINIMUM DECUTIO	WEA SELECT PLANS MEDICAL	Regular	10/01/2013				
▶ WEAEASY	WEA EASYCHOICE PLAN	WEA SELECT PLANS MEDICAL	Regular	10/01/2013				

- Repeat this process for each medical plan.

Renaming Last Year's Extract Files

Before generating this year's OIC Data extract files, consider whether you wish to retain last year's files for historical purposes (retaining the files is recommended). To retain last year's CSV files, they must all be renamed before running the **Generate** process. Note that if you do NOT rename last year's CSV files, they will be overwritten. To rename the files follow the process below.

- Navigate to the location of the CSV files and highlight the first CSV file.



- Right click on the file and select **Rename**.
- Modify the file name, i.e. SD33205_Section1**2012**.csv. In this example the reporting year was added to the end of the file name.
- Repeat this process for all CSV files from last year.

Generating Extract Files And Saving Your Configurations

After configuring the entire **Generate OIC Extract Data** screen the CSV files can be generated.

NOTE The Section 2 CSV file will not be generated by the extract; however districts will be required to answer the Section 2 questions directly in the spreadsheet.

- Click **Save** to save the current configuration settings.

Generate OIC Extract Data

* Report Year: 2013 Use Insurance Tracking to Setup OIC data

* Export Directory: \\Esd101-prog-01\Evergreen (Stevens) (33205)\Export\Fin_Sel

Choose Salary Negotiations Plan to Report From

* Plan Year: 2013 * Select Salary Negotiations Plan: *3-275 2013-2014

Payroll Selection

Payroll Method: Dates Select Payrolls

Select Payrolls *None Selected

* Check Date Range: 09/01/2013 to 09/30/2013

Vendor Payments

Medical, Dental, Vision Vendor Selection

HCA Carveout and Supplemental Vendor Selection

WEA SELECT PLANS DENTAL
WEA SELECT PLANS VISION
WEA SELECT PLANS MEDICAL

WASHINGTON STATE TREASURER

- Click **Generate** to generate the extract files. The process runs in the **Print Queue**.
- When the process is complete, click **View Report** to see a report that is produced with a list of CSV files generated.

```
4woicrprt001.p 17-2  
05.13.10.00.11-10.2
```

EVERGREEN SCHOOL DISTRICT
Generate OIC Extract Data Export

FILES CREATED

```
SD33205_Section1.csv  
SD33205_Section3.csv  
SD33205_Section4.csv  
SD33205_Section5.csv  
SD33205_Section6.csv  
SD33205_Section7.csv
```

- You can now access and examine the contents of each of your CSV files. If you need to change or update data in your system to improve the data accuracy of the extract, run the **Generate** process again.