

Navigating eBenefits

Introduction

- eBenefits is the enrollment system that members use to enroll in their health benefits. Part of your role as an HBR is to perform benefits data management including processing new hires, employee terminations, managing tasks in the eBenefits system, and Open Enrollment.
- This module provides a high-level overview of how to navigate through some eBenefits functions.

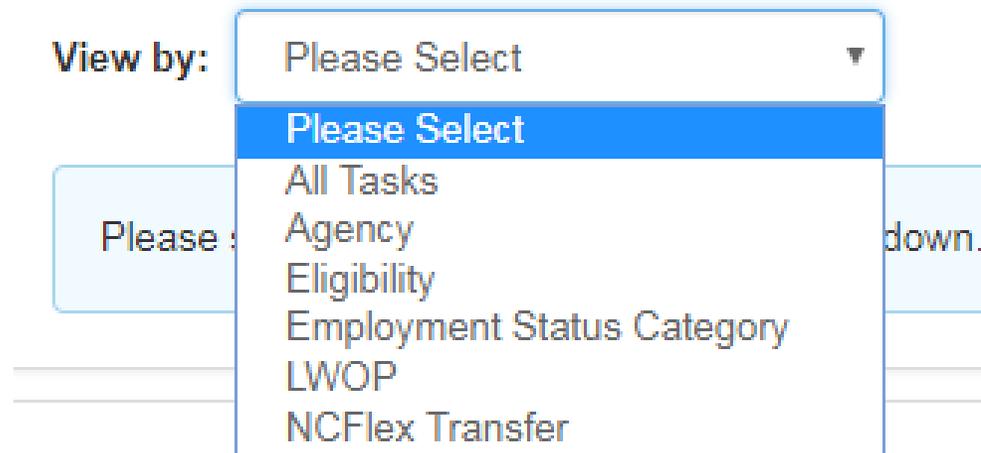
Navigating the System

- You can easily find the information you are looking for by selecting navigation elements on the *Home* page. The following is a list of some of the navigation elements you may access from the *Home* page:
 - Manage processes related to one or more employees (*To-Do List*)
 - Navigate to screens related to other system functions, such as reports, videos, user guides and more (*Navigation tabs*)
 - Search for employees (*Search bar/Employees tab*)
 - Create reports (*Data & Reporting tab*)
 - Manage notes and customized information to display to employees in the Member role (*Content Manager tab*)
 - Compose messages to employees (*Messages tab*)

Managing the To-Do List

- Use the *To-Do List* to keep track of employee activity. You can filter the categories of employees that display in your *To-Do List*.
- *Note:* For very large employer groups, no tasks will display by default. You will need to select an option from the *View by* drop-down box to display all tasks or specific categories of employees.

To-do list



**Note – depending on the settings for your Employing Unit you may see different options than what is presented in the screen shots*

Managing the To-Do List

- The *To-Do List* has different types of data related to your employees, such as items that need to be approved, incomplete information and benefit elections that have not been started.
- These items are separated into sections (including current benefits, Open Enrollment benefits, work-related information, personal data and so on).
- The number in front of each link indicates how many employees need attention. (See image on the next slide.)
- When you select a link, you are taken to the list of associated employees for that item.

of Employees that need attention

Personal

7 Employees Need to be Approved

Work

14 Employees Need to be Approved

110 Employees and/or Dependents with Invalid Data

Current Benefits

[View by offer >](#)

15 Employees Need to be Approved

91 Employees and/or Dependents with Invalid Data

Open Enrollment Benefits

[View by offer >](#)

2 Employees Need to be Approved

Benefits not started

Enrollment period 3 selected Benefit offer 32 selected

11 Employees whose enrollment period has passed

1 Employees with 1 to 5 days left to enroll

27 Employees with 6 or more days left to enroll

[View all employees with benefits not started >](#)

Dependent Information

17 Employees Missing Dependent Verification

To-Do List Preferences

- If you have access to *Group Settings – Group approval preferences*, you can select the types of information that you can see in your To-Do List.

The screenshot shows the 'Group approval preferences' page in the North Carolina State Health Plan system. The page title is 'Group approval preferences' and it includes a sub-header 'Select items from the list for which Task List Approval or Review items should be generated.' The page contains a list of 17 items, each with a checkbox and a help icon. The items are: Changes to Personal information, Changes to Direct Deposit information, Changes to Work information, Changes to Military information, Changes to HSA Contributory Benefit, Elections made during an initial eligibility period, Primary Care Physician changes made, Changes made to employee elections of cycle other than PCP, Enable note in member role, Enable for all offers, Changes to Medicare information, Changes to Additional Insurance information, Changes to Beneficiary information, Changes made to employee information or elections by the carrier, Automatic Enrollment into benefits, Elections and changes made during the Open Enrollment period, and Automated Dependent Cancellations. A dropdown menu is open under 'Enable for all offers', showing options: 2016 SHP Medical, 2018 SHP Medical, 2017 SHP Medical, 2018 NCFlex Accident Plan, and 2018 NCFlex Dental. At the bottom of the page are 'Cancel without Saving' and 'Save' buttons.

Viewing Benefit Enrollment

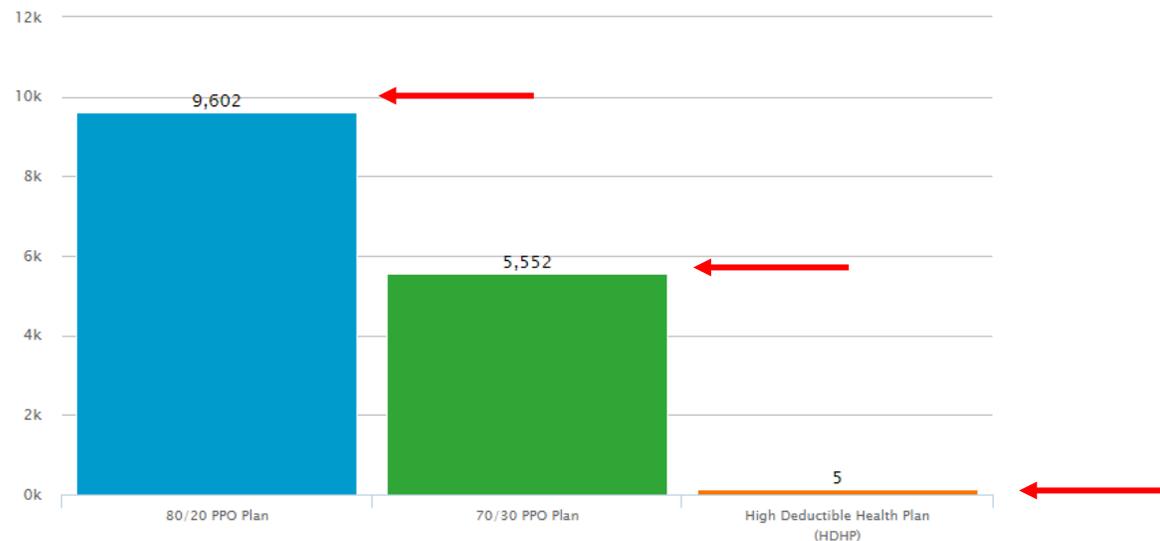
- You can see how many employees are enrolled in benefits by looking at the charts at the bottom of the Home page in the *Benefit Participation* section. You can select the plan year and the benefit type from the drop-down boxes above the chart.
- When you hover over the chart, you will see the number of employees enrolled in the benefit plan:

Benefit Participation

01/01/2020 - 12/31/2020

Medical

} Drop-down menus



Viewing Benefit Enrollment – Under 1,000 Enrollees

- When you click on the chart, you will see the list of employees enrolled in that plan if under 1,000 enrollees:

Employees Add a new employ

Employee Search Results

241 Active Employees 140 Terminated Employees Dependents

Actions ▾

Displaying items 1 - 25 of 241 More Results ▶

<input type="checkbox"/>	Type	Name	SSN	Actions
<input type="checkbox"/>	<input type="radio"/>	[REDACTED]	[REDACTED]	+ -
<input type="checkbox"/>	<input type="radio"/>	[REDACTED]	[REDACTED]	+ -
<input type="checkbox"/>	<input type="radio"/>	[REDACTED]	[REDACTED]	+ -

Viewing Benefit Enrollment – Over 1,000 Enrollees

- If there are more than 1,000 employees, you will receive 3 options from which you may choose:
 - Send a message to all
 - Export to CSV
 - Run a Benefit Detail Report to see enrollment details for all plans

The screenshot shows the North Carolina State Health Plan web portal. At the top left, there are logos for the State Health Plan and Dale R. Folwell, CPA. The user is logged in as 'SHP-Beacon'. A search bar is visible with the text 'Search by Name or SSN'. The main content area is titled 'Employees' and shows 'Employee Search Results' for the '80/20 PPO Plan'. A message states: 'This plan has more than 1,000 enrollees. What would you like to do?*' with three radio button options: 'Send a message to all', 'Export to CSV', and 'Run a Benefit Detail Report to see enrollment details for all plans'. There are 'Previous' and 'Next' buttons below the options. The footer contains copyright information for Benefitfocus.com Inc., contact information for account consultants, and logos for the State Health Plan and Dale R. Folwell, CPA.

Exporting Benefit Participation Information

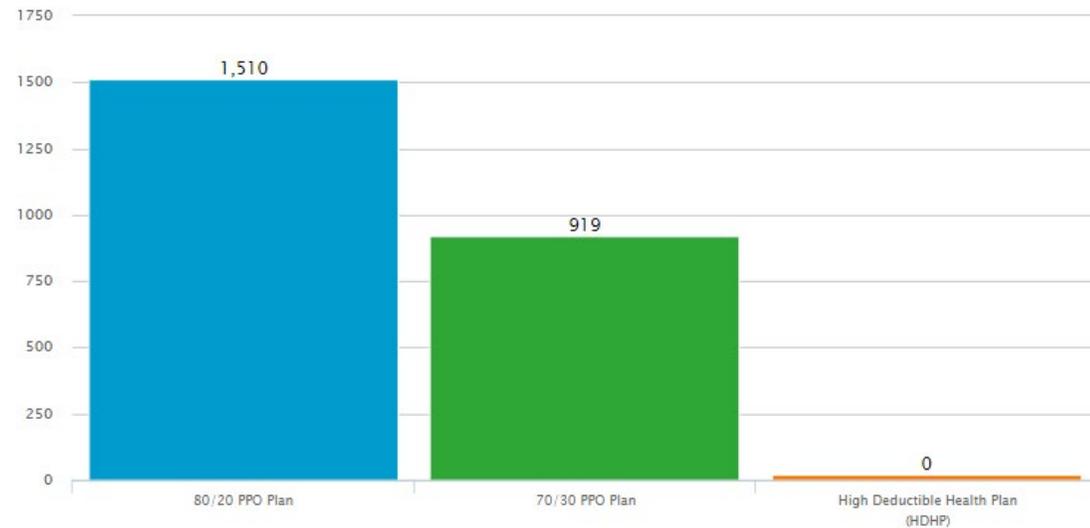
From the Home page, you can download a file that shows you the details of the benefit participation chart.

1. Select the *Home* tab and scroll down to the chart in the *Benefit Participation* section of the page.
2. Select the *Export* button below the chart. The file will save to the Downloads folder on your computer in .csv format.
3. Open the file in Microsoft Excel or a compatible software application. The file will show the benefit plan year (participation period), the benefit plan name and the number of employees who have selected the plan.

Benefit Participation

01/01/2020 - 12/31/2020

Medical



Export

	A	B	C
1	Participation Period	Plan Name	Participation Count
2	01/01/2020 - 12/31/2020	80/20 PPO Plan	1510
3	01/01/2020 - 12/31/2020	70/30 PPO Plan	919

Comparing Benefit Plan Counts Across Plan Years

- The *Benefit Participation* widget includes the option to compare enrollment counts across plan years. To do so, select the *Add another to compare* button, and then select an additional plan year.
- As a result, the *Benefit Participation* widget displays two employee counts for each plan: one for the initial plan year selected and another for the second plan year selected.

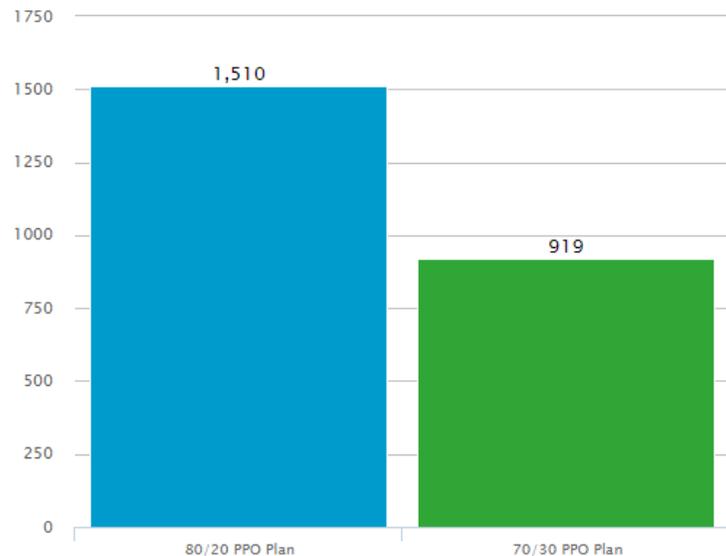
Benefit Participation

01/01/2020 - 12/31/2020

Medical



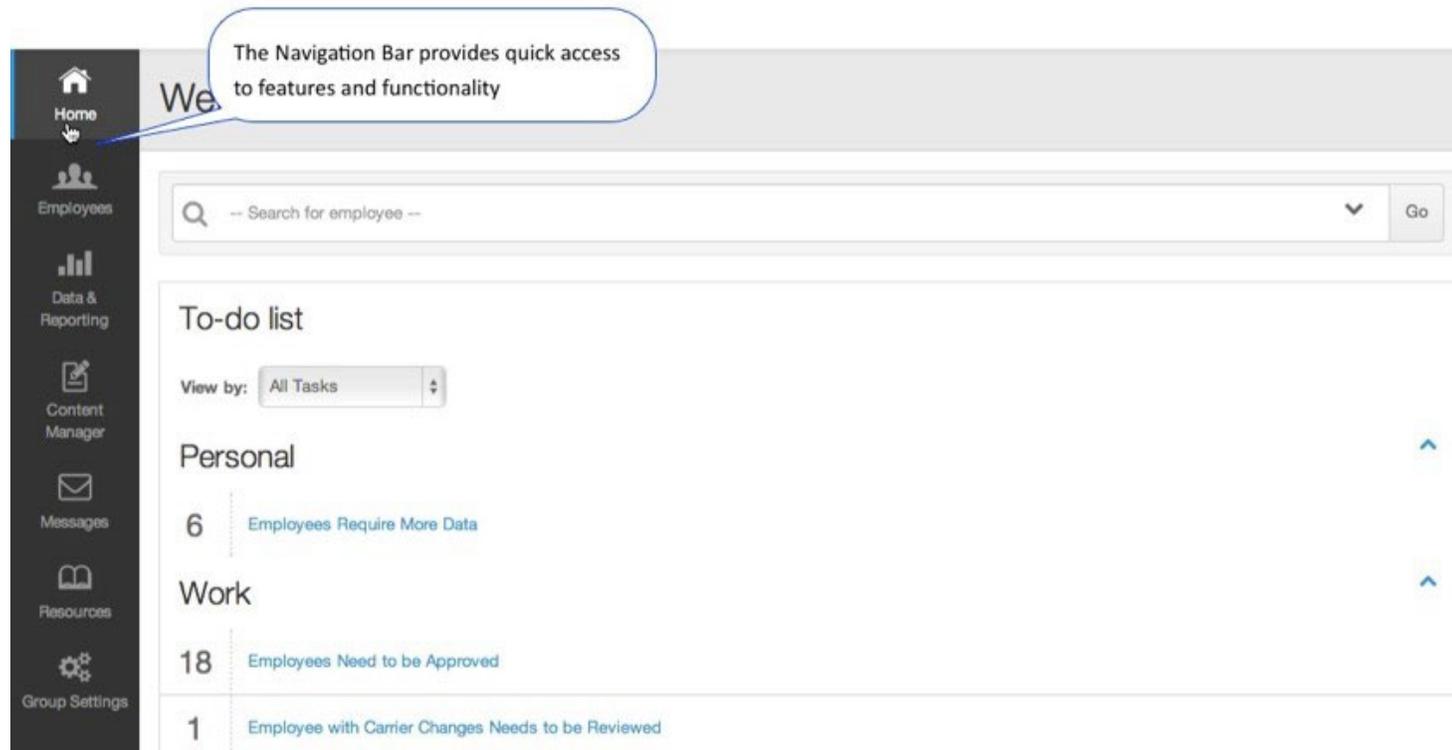
Select the desired plan year



Please note: This feature enhancement requires configuration by a **Benefitfocus Account Manager**.

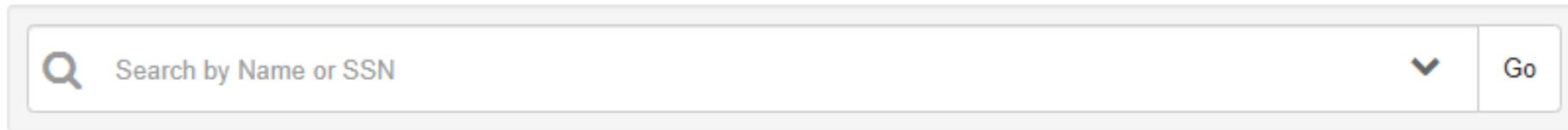
Using Navigation Tabs

- The *Navigation Bar* on the left portion of the screen includes tabs that allow you to dive deeper into the system. Your access to certain tabs may vary depending on your account permissions.
- These navigation elements display on every tab within the system, allowing you quick access to information without having to perform extensive searches to find it.



Searching for Employees

- You can search for employees by entering a name or Social Security number in the search bar in the top, right corner of any screen or above the *To-Do List* on the *Home* page.



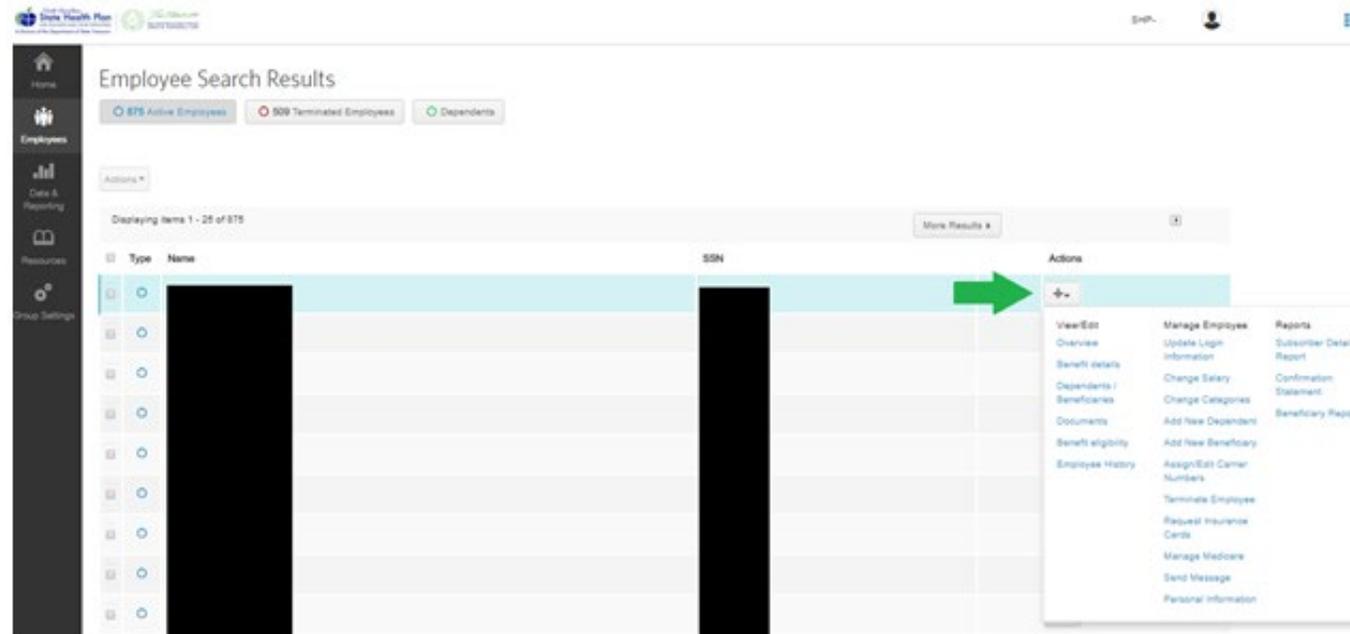
A search bar with a magnifying glass icon on the left, the text "Search by Name or SSN" in the center, a dropdown arrow on the right, and a "Go" button on the far right.

- You can add additional criteria for a more complex search by selecting the *Employees* tab in the *Navigation Bar*. Complete the steps on the next slide to perform a simple search.

Steps to Perform a Search

1. Enter the first few characters or the full criteria in the search field (example: *smi* or *smith* for a *Name Search*). The search is not case sensitive.
2. Select *Go* or press *Enter*. The *Employee Search Results* page provides you with a list of employees who meet the criteria entered into the search field.
3. To open a record, select the employee's name from the list.
4. You can also see other items by selecting the *Actions* icon next to the employee's SSN.

Note: If the system finds an exact match when you search by last name or Social Security number (SSN), you are taken directly to the employee's *Overview* tab



Create a Report

- HBRs have the ability to create reports from eBenefits from the “Data and Reporting” tab

Search by Name or SSN

Data & Reporting

Your reports

Standard reports

Scheduled reports

ACA Reporting

Favorite Popular Benefit Census Administrative Payroll and Billing Transaction History Employee Profile Surveys

Popular Reports

★ Benefit Summary	Includes cost and enrollment summary information for each plan and coverage level
★ Benefit detail	Includes cost and enrollment information for each covered person
★ Benefit refused / cancellation	Includes enrollment information for persons that refused or canceled coverage
★ Employee Participation	Includes detailed information regarding employee participation
★ Employee census	Includes name, address, and date information for all employees
★ Dependent census	Includes basic information for dependent spouses and/or children; you have the option to show only dependents turning a particular age between dates that you specify
★ Terminated employees	Includes basic information for employees terminated between dates that you specify
★ Task List	Provides a list of items which requires attention
★ Active User Accounts	Includes details of current active user accounts

TUA List

- HBRs can create a report that identifies employees who are subject to provide a Tobacco Cessation Verification document in order to maintain the \$60 Premium Wellness Credit.

Home

Employees

Case Management

Data & Reporting

Content Manager

Resources

Group Settings

Search by Name or SSN

Data & Reporting

Your reports

Standard reports

Scheduled reports

ACA Reporting

Favorite Popular Benefit Census Administrative Payroll and Billing Transaction History Employee Profile Surveys

Surveys

★ Employee Rate Factor Survey Detail Includes employee rate factor survey participation and response information

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- Select Data & Reporting on the side navigation bar.
- Select Surveys from the top navigation
- Select Employee Rate Factor Survey Detail.

TUA List Continued

- From Filtering Options, select Tobacco Attestation for the appropriate year
- From Participation Period, select Open Enrollment
- Click Create Report

Group by: ---None---

Sort by: Last Name, First Name

Mask SSN in Report Results

Filtering Options

Survey Name*

- All---
- 2019 New SHP Tobacco Attestation
- 2020 New SHP Tobacco Attestation
- 2021 New SHP Tobacco Attestation
- 2022 Tobacco Attestation
- 2023 Tobacco Attestation
- 2024 Tobacco Attestation**
- New SHP Tobacco Attestation Survey
- Tobacco User Attestation

Participation Period*

Open Enrollment

Employment Status Category*

Search

Select all

Open Enrollment

Current

Previous (01/01/2022 - 12/31/2022)

Previous (01/01/2021 - 12/31/2021)

Previous (01/01/2020 - 12/31/2020)

Cancel Create Report

History of Changes Overview

- The History of Changes will help you to identify when and how a change was made to an employee's profile in eBenefits.
- After searching for and selecting an employee in eBenefits, select Employee History, then View in History of Changes.

The screenshot shows the 'Employee History' section of the eBenefits system. On the left is a navigation menu with options: Overview, Benefit details, Dependents / Beneficiaries, Documents, Benefit eligibility, Employee History (highlighted), EMPLOYEE REPORTS, Subscriber Detail Report, Confirmation Statement, and Beneficiary Report. The main content area is titled 'Employee History' and contains a question: 'How do you want to view this employee's history?'. There are two radio button options: 'Point in time -- employee's record as of a specific date' and 'Timeline -- summary of events'. A blue 'Next' button is located below the options. In the top right corner of the main content area, there is a yellow button labeled 'View in History of Changes'.

History of Changes Key Identifiers

- BATCHUSER
 - Mass job that was completed by Benefitfocus
- BFPAYROLL
 - Applicable for Payroll File groups only
 - Change was made by the inbound payroll file
- DATASYNC
 - Change that was made by iTEDIUM file
 - Non-Payments for those in a Direct Bill employment status category
 - TPA file where Medicare information is added or for PCP updates
- BFXXXXXX
 - Either a Benefitfocus Account Manager or someone from the call center making a change
- SHPXXXXX
 - State Health Plan made a change

How to search History of Changes

- Start and End Date fields will be available for modification in order to get the full picture of the changes
- CTRL + F on keyboard to search for key words
 - Example : Searching “due to” will bring you to QLEs that have been keyed.

The screenshot shows a web browser window with a search bar containing the text "due to". Below the search bar, the application displays a list of changes. The first two entries are for "NCFlex Voluntary AD&D - 2020 NCFlex Accidental Death and Dismemberment (01/01/2020 - 12/31/2020)" and "NCFlex Voluntary AD&D - 2019 NCFlex Accidental Death and Dismemberment (01/01/2019 - 12/31/2019)". Both entries show a change in the "Relationship" field from "Primary/Secondary" to "Child/Secondary". The third entry is "Changed by KIW0529 ([p]938877132:554644117:kiw0529) due to Birth on 07/28/2019", which is highlighted in yellow. This entry shows a change in the "Status" field from "SPECIAL" to "Accepted" and the "Relationship" field from "Child" to "Child". The fourth entry is "NCFlex Vision - 2019 NCFlex Vision (01/01/2019 - 12/31/2019)", which shows a change in the "Status" field from "SPECIAL" to "Accepted" and the "Relationship" field from "Child" to "Child". The fifth entry is "NCFlex Critical Illness - 2019 NCFlex Critical Illness (01/01/2019 - 12/31/2019)", which shows a change in the "Status" field from "SPECIAL" to "Accepted" and the "Relationship" field from "Child" to "Child".

Changes, Approvals, and Timing

- Changes that prompt a task must be approved in order for the change to send to the appropriate vendors.
- File transmissions to and from Benefitfocus follow a daily schedule.
- Example:
 - Employee enters a QLE of Birth and adds a newborn to benefits on Monday morning
 - HBR approves the pending task 5:05 PM on Wednesday.
 - The change will not send to appropriate vendors until Thursday.