



All Your Benefits. One Place.®

## DOCUMENT CENTER

### *Process Document*

*Utilizing the Document Center in eEnroll will eliminate the amount of time a Health Benefits Representative (HBR) will take to track down documentation from employees. This allows the documentation to be uploaded at the event being keyed by the employee, and the HBR would be able to access documents at the same time at determining if the pending task should be approved*

# Document Center FAQ's

## – How is the document collection process changing?

- The appointed Health Benefits Representative (HBR) should be collecting documentation to verify that the status change meets the requirements per Section 125 and to validate the eligibility of a dependent when added to the health plan. The only change is that the documents can now be uploaded electronically directly into the document center on the member's profile. This feature assists HBRs with the ability to review the documents instantly and serves as a permanent storage while the member is actively working, which eliminates the need to keep hard copies. It also provides easy access for the Plan to view the documentation when validations are conducted to verify if the proper documents have been submitted.
- eEnroll is a self-service system. HBRs may provide assistance by uploading the documents for the member ONLY when the member is unable to upload the documentation. It is imperative that HBRs upload the documents to the correct employee's profile to ensure there is no violation of the employee's Protected Health Information (PHI).
- HBRs for state agencies should reach out to BEST Shared Services with questions on the process as they are managing the document approval process.

# Document Center FAQ's

- How do I manage this?
  - This can all be managed within eEnroll. It is the advice of The State Health Plan to have all employees uploading documentation in eEnroll.
  - Document tasks will populate under the Dependent Information in your To-Do list. Refer to pages 7 - 10.
  - The document can be reviewed, then approved or denied within eEnroll. Click [here](#) for a list of acceptable documents.
  - Utilizing the 'Pending Documentation Review' Report (located under the Standard Reports -> Benefit tab). This report will show members whom are in all status': pending, approved, denied, etc.

# Document Center FAQ's

## – When do I manage this?

- Benefitfocus recommends this to be managed daily. However, the team at the employer unit may determine the best practice that will allow documents to be managed in a timely manner.
- Documents should be uploaded within 30 days from the event. HBR's should stay on top of the tasks for members whom show 'Missing Dependent Verification' Tasks on their profile.

Located on employee Profile:



Missing Dependent Verification for

Located on HBR To-Do List:



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Employees Missing Dependent Verification

# Document Center FAQ's

- What transactions show the document tasks in eEnroll?
  - Employees are only prompted to upload documentation when adding a dependent. Therefore, only document tasks related to the dependent verification will populate
  - Employees may also upload supporting documentation to verify the status change meets the definition of a Qualifying Life event per Section 125. However, a document task will not populate
  - The pending approval task on the To-Do list should be the indicator that documentation is required from the member for the Qualifying Life Event

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Employees Need to be Approved

# Things to Remember

- The Document Center has the same functionality from the employee login, as well as the HR login
- Enrollments are sent to the carrier once the Health Benefit Representative approves the enrollment task. The pending document tasks will not prevent the member's enrollment from being sent.
- Only one document can be associated with one task (i.e. if a member requires two documents to support adding a spouse, the member can only associate one document with the pending request.). The second document will be stored in the document center and can be viewed by filtering the status to 'All Documents'.
- If the member requires multiple documents to allow the change, it is the HBR's responsibility to ensure all documents are uploaded
- To view all documents uploaded, and not necessarily just pending approvals, please filter the status from 'All Requests' to 'All Documents'
- If a document is approve or denied, the dependent will not be removed. Approving or denying the pending task will be the only thing to complete the enrollment change

# To-Do List / Task list

- As the HBR you can view all tasks regarding documentation from the task To-Do list.

Home

Employees

Data & Reporting

Content Manager

Messages

Resources

96 Employees with Election Approvals (Health Statement Required)

Benefits not started

Enrollment period 3 selected Benefit offer 34 selected Go

4 Employees with 6 or more days left to enroll

Dependent Information

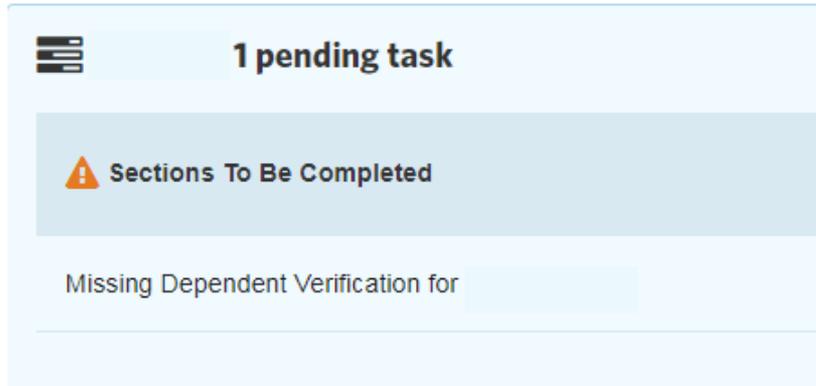
8 Employees Missing Dependent Verification

1 Employee with Documents Pending Approval

1 Employee with Denied Documents

# Types of Documentation Tasks

- **Missing Documentation:**  
Employees who have added dependents to coverage, but have not added documentation



A screenshot of a user interface showing a pending task. At the top, there is a hamburger menu icon and the text "1 pending task". Below this is a section titled "Sections To Be Completed" with a warning icon. Underneath, it says "Missing Dependent Verification for" followed by a blurred name.

## Dependent Information

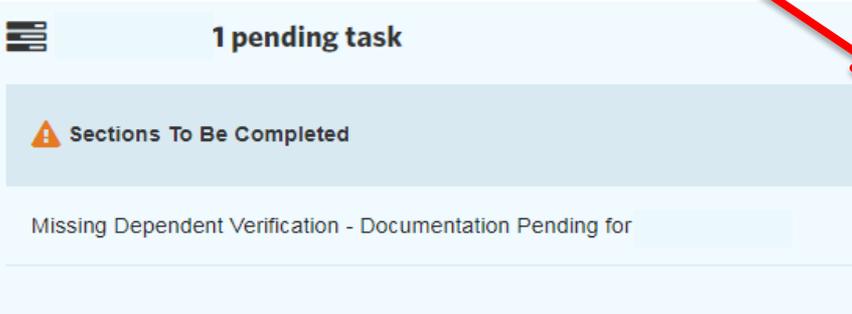
8	Employees Missing Dependent Verification
1	Employee with Documents Pending Approval
1	Employee with Denied Documents



# Types of Documentation Tasks

- **Documents Pending Approval-**  
Employees who have uploaded supporting documentation for dependents

## Dependent Information



A screenshot of a notification box with a light blue background. At the top left is a hamburger menu icon. To its right, the text reads "1 pending task". Below this is a section header "Sections To Be Completed" with a warning icon (a triangle with an exclamation mark). Underneath, there is a list item: "Missing Dependent Verification - Documentation Pending for". A red arrow points from the right side of this notification box towards the "1" in the "Dependent Information" table.

8 Employees Missing Dependent Verification

1 Employee with Documents Pending Approval

1 Employee with Denied Documents

# Types of Documentation Tasks

- **Declined Documentation-**  
Employees' documentation has been denied, and has not yet been corrected.

## Dependent Information

 **1 pending task**

 **Sections To Be Completed**

Missing Dependent Verification - Documentation Declined for



8	Employees Missing Dependent Verification
1	Employee with Documents Pending Approval
1	Employee with Denied Documents

# Reviewing Member's Documents from the To-Do list

- To review the uploaded pending documentation for a particular member from the To-Do List, you can click on Employees with Documents Pending Approval.

## Dependent Information

86 Employees Missing Dependent Verification

31 Employees with Documents Pending Approval

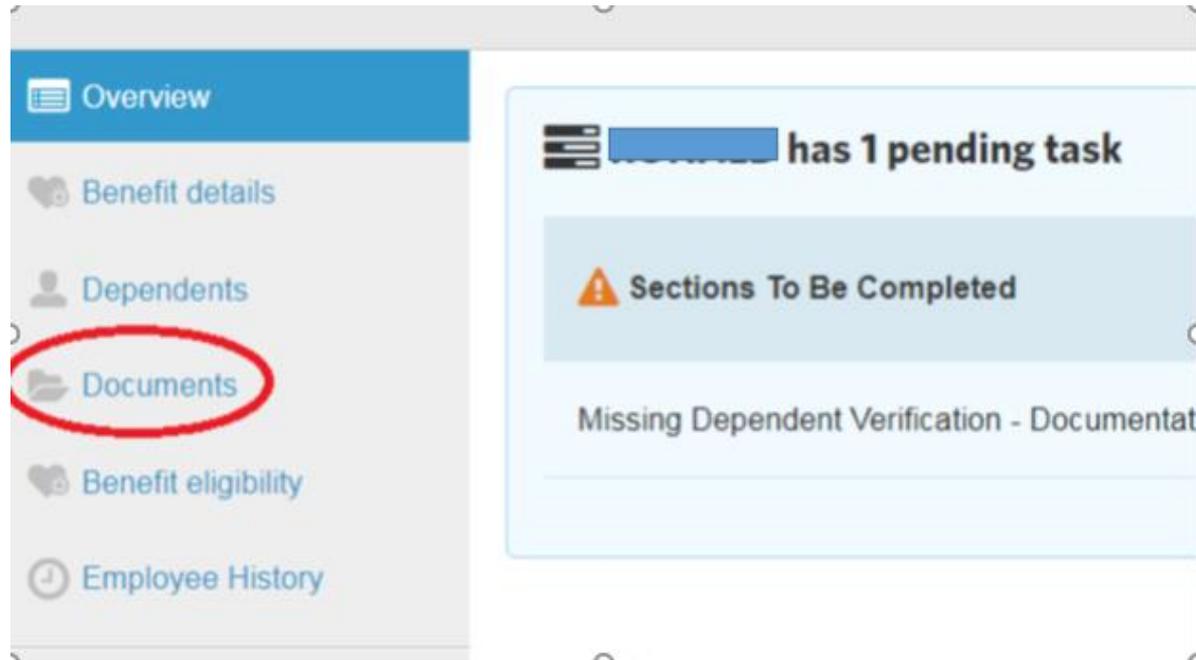
15 Employees with Denied Documents



- Once clicked, this will list the page of all members pending documentation approval.
- You can click on the employee's name within this list to pull up their profile.

# Reviewing Member's Documents from the To-Do list

- Once on the employee's profile, select **Documents** within the tool bar on the left side of the member's page.



# Reviewing Member's Documents from the To-Do list

- Once in the **Document Center**, this is where documentation can be seen, filtered, approved/denied.

## Document Center

For requests with a status of "Document Required", upload a document to associate it. The Document will then show as "Pending Approval" until it is approved or denied by an administrator. When adding a document through the "Add Document" option, it can then be associated with a "Document Required" request and can be viewed by selecting the filter for "All Documents".

**Documents**

There are 1 requests

0 Document Required, 1 Pending Approval, 0 Approved, 0 Denied, 0 Disabled, 0 Expired, 2 All Documents

[+ Add Document](#)

Search by:  
 Employee name  Document name

per page

Filter by type  Filter by status

Sort By:

	<b>Dependent verification form</b> Dependent Name [REDACTED] Benefits will not be effective until a verification document has been received and approved by your administrator.	 11/22/2017  11/22/2017  [REDACTED]  1040 Income Tax Return
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per page

Next

# Documents have been uploaded, but not able to be seen

- Step 1: Notate there is a document loaded, but has not been linked to the task

The screenshot shows a 'Documents' section with the following elements:

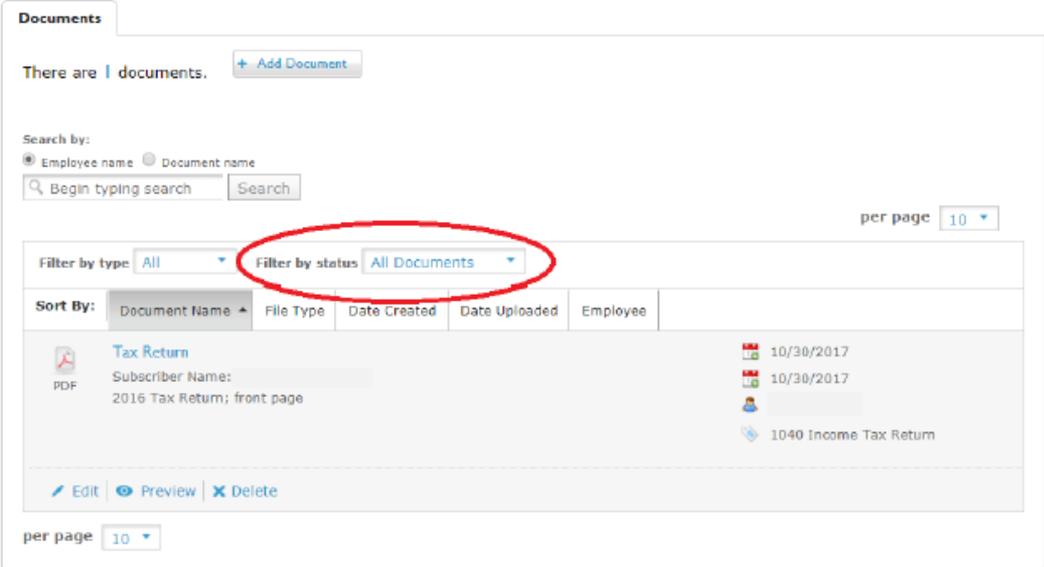
- Header: **Documents**
- Status summary: **There are 1 requests**
- Counters: **1 Document Required**, 0 Pending Approval, 0 Approved, 0 Denied, 0 Disabled, 0 Expired, **1 All Documents**
- Buttons: **+ Add Document**
- Search section: **Search by:**  Employee name  Document name. Search input: **Begin typing search** **Search**
- Filters: **Filter by type**  **Filter by status**
- Sort By: **Document Name** (selected), Date Created, Date Uploaded, Employee
- Document entry:
  - Icon:
  - Title: **Document is awaiting upload**
  - Text: **Dependent Name: Spouse54 Smith** **10/30/2017**
  - Text: **Benefits will not be effective until a verification document has been received and approved by your administrator.**
  - Footer: **Document Required** **Upload a Document** **Associate an Existing Document**
- Footer: **per page**

# Documents have been uploaded, but not able to be seen

- Step 2: To view all documents uploaded, filter on “Filter by Status” to “All Documents”

## Document Manager

For requests with a status of “Document Required”, upload a document to associate it. The Document will then show as “Pending Approval” until it is approved or denied by an administrator. When adding a document through the “Add Document” option, it can then be associated with a “Document Required” request and can be viewed by selecting the filter for “All Documents”.



The screenshot displays the Document Manager interface. At the top, it says "There are 1 documents." and includes an "Add Document" button. Below this is a search section with "Search by:" options for "Employee name" (selected) and "Document name", and a search input field. To the right is a "per page" dropdown set to 10. The main section has a "Filter by type" dropdown set to "All" and a "Filter by status" dropdown set to "All Documents", which is circled in red. Below the filters is a "Sort By:" section with columns for "Document Name", "File Type", "Date Created", "Date Uploaded", and "Employee". A document entry is shown with a PDF icon, the title "Tax Return", and details: "Subscriber Name: 2016 Tax Return; front page". To the right of the document are three status indicators: a red "X" icon with "10/30/2017", a green checkmark icon with "10/30/2017", and a blue person icon with "1040 Income Tax Return". At the bottom of the document entry are "Edit", "Preview", and "Delete" actions. A second "per page" dropdown set to 10 is at the bottom left.

# Documents have been uploaded, but not able to be seen

- If the document is within the “All Documents” section and is related to the pending task for the dependent, the document has not been associated to the task. To do this click “Associate an Existing Document”. Select from the drop down the type of document that was uploaded. Then select associate this document.

⚠ Document Required [Upload a Document](#) [Associate an Existing Document](#)

## Associate an Existing Document

Select the file for [REDACTED] that matches this request\*

1040 Income Tax Return



Word

Dummy Doc

Subscriber Name: [REDACTED]



12/01/2017



12/01/2017



[REDACTED]

[Associate this Document](#)

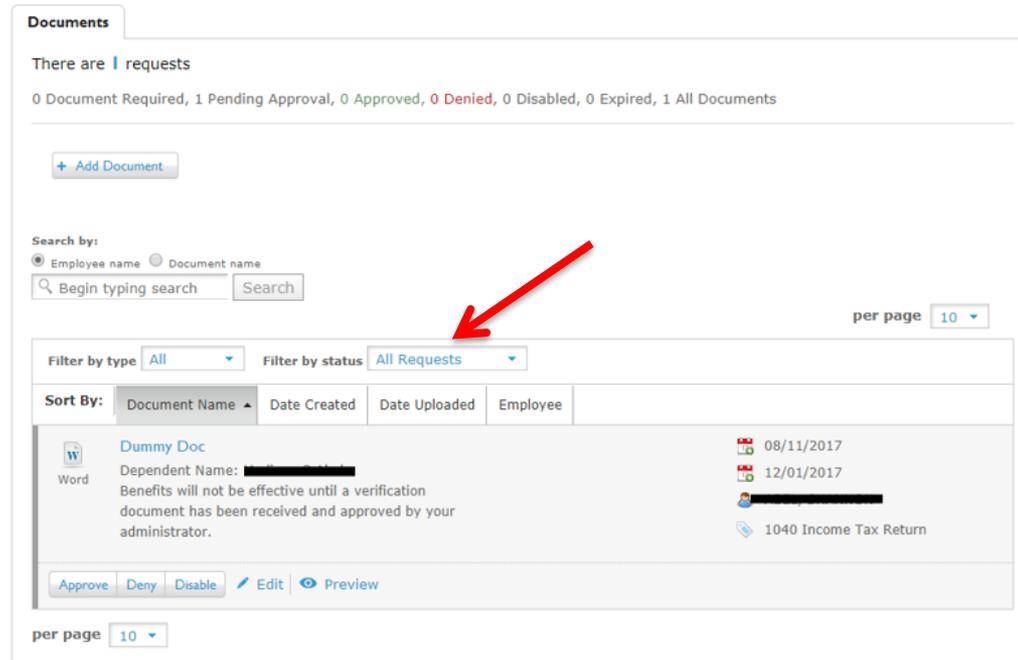
[Preview](#)



1040 Income Tax Return

# Documents have been uploaded, but not able to be seen

- Once the Document has been associated the document can be approved or denied accordingly.
- Only one document can be associated to the task. If the dependent requires two documents to support the QLE the other document will be located in the “All Documents” section for the HBR to review.



The screenshot shows a web interface for document management. At the top, it says "Documents" and "There are 1 requests". Below this, it lists the status of requests: "0 Document Required, 1 Pending Approval, 0 Approved, 0 Denied, 0 Disabled, 0 Expired, 1 All Documents". There is a "+ Add Document" button. A search bar is present with "Search by:" options for "Employee name" and "Document name", and a search input field containing "Begin typing search". A red arrow points to the "Filter by status" dropdown menu, which is currently set to "All Requests". Below the filters, there is a "Sort By:" section with options for "Document Name", "Date Created", "Date Uploaded", and "Employee". The main content area shows a document entry for "Dummy Doc" with a "Word" icon. The document details include "Dependent Name: [REDACTED]", "Benefits will not be effective until a verification document has been received and approved by your administrator.", and a list of associated documents: "1040 Income Tax Return" with a date of "08/11/2017" and another date of "12/01/2017". At the bottom, there are buttons for "Approve", "Deny", "Disable", "Edit", and "Preview". A "per page" dropdown is set to "10".

# Approve Documentation

- After you have previewed the documentation, and have verified the attached document is acceptable. Click Approve.

**Documents**

There are 1 requests

0 Document Required, 1 Pending Approval, 0 Approved, 0 Denied, 0 Disabled, 0 Expired, 1 All Documents

[+ Add Document](#)

Search by:  
 Employee name  Document name

per page 10

Filter by type All Filter by status All Requests

Sort By: Document Name Date Created Date Uploaded Employee

	<b>Tax Return</b> Dependent Name: Spouse54 Smith 2016 Tax Return; front page Benefits will not be effective until a verification document has been received and approved by your administrator.	10/30/2017 10/30/2017  1040 Income Tax Return
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[Approve](#) [Deny](#) [Disable](#) [Edit](#) [Preview](#)

per page 10

# Approve Documentation

- Once documentation is approved the member will reflect approved in green text.
- When the documentation is approved, the dependent will reflect “Verified” under the dependent profile.

**Documents**

There are 1 requests

0 Document Required, 0 Pending Approval, 1 Approved, 0 Denied, 0 Disabled, 0 Expired, 1 All Documents

+ Add Document

Search by:

Employee name  Document name

Begin typing search Search

per page 10

Filter by type All Filter by status All Requests

Sort By: Document Name Date Created Date Uploaded Employee

PDF	<b>Tax Return</b> Dependent Name: Spouse54 Smith 2016 Tax Return; front page Benefits will not be effective until a verification document has been received and approved by your administrator.	10/30/2017 10/30/2017 1040 Income Tax Return
-----	--	--

per page 10

# Denying Documentation

- After you have previewed the documentation, and have decided that the documentation is not acceptable. Click Deny.

**Documents**

There are **1** requests

0 Document Required, 1 Pending Approval, 0 Approved, 0 Denied, 0 Disabled, 0 Expired, 1 All Documents

[+ Add Document](#)

Search by:

Employee name  Document name

per page **10**

Filter by type **All** Filter by status **All Requests**

Sort By: **Document Name** Date Created Date Uploaded Employee

	<b>Dependent Verification</b>	10/22/2017
	Dependant Name: [REDACTED]	10/25/2017
	Benefits will not be effective until a verification document has been received and approved by your administrator.	[REDACTED]
		Adoption/Legal Guardianship Papers

per page **10**

# Denying Documentation

- After selecting the denied reason, click “Deny Document”.
- To ensure the member understands why the document has been denied, the HBR can leave a comment to the member. The comment should include what documents are needed to verify the dependent.

**Deny a Document**

Dependent Verification

████████████████████  
Adoption/Legal Guardianship Papers

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**Please choose a declination reason**

No Response

Invalid Documentation

Untimely Response

Unreadable Documentation

Other

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**Please include any additional information that should be presented to the user. If left blank, a default message of "New Document Required" will be used**

**Deny Document** ←

# Denied Documentation (Employee View)

- When the member logs in they will see the following message on their home screen notifying them that their documentation has been denied. It is the members responsibility to submit new documents for the dependents who were denied.

## Important Messages for You

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### **New Activity in Document Center**

Your document has been **denied**, and a new document should be uploaded. Access [My Document Center](#) to submit now.

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### **Dependent Verification Document Request**

Documentation must be submitted and/or approved for the following dependent: Sarah Camden Parker. Access [My Document Center](#) to submit now.

# Denied Documentation (Employee View)

- The employee will need to click on “My Documents” on the left tool bar, the member will then be taken to the document center to upload the correct documentation for the dependent.

Home

Profile

Benefits

Dependents

Language Preferences

MANAGE ACCOUNT

Login Information

My Documents

Medicare

Life Change

Select or Update Primary Care Provider

QUICK LINKS

BlueConnect

CVS Caremark

Important

New Account

Your document

Dependent

Dependent

Document

Get Started

Benefits Summary

# Denied Documentation (Employee View)

- The main page will show the declined documents, along with the note the HBR left to let the employee know why it was declined, and what documentation is needed to support the enrollment change.

0 Document Required, 0 Pending Approval, 2 Approved, **1 Denied**, 0 Disabled, 0 Expired, 3 All Documents

+ Add Document

Begin typing search query  Search

per page 10

Filter by type All Filter by status All Requests

Sort By: Document Name Date Created Date Uploaded

	<b>Bereman Marriage License</b>	 08/19/2017
Image	Dependent Name: [REDACTED]	 08/19/2017
	Benefits will not be effective until a verification document has been received and approved by your administrator.	
	<div style="border: 1px solid black; background-color: #ffffcc; padding: 5px;"><p>Please provide a supporting document with marriage certificate that shows joint tenancy or Go to <a href="https://shp.nctreasurer.com/Medical%20Benefits/DependentEligible_Verification.pdf">https://shp.nctreasurer.com/Medical%20Benefits/DependentEligible_Verification.pdf</a> for a list of required documents.</p></div>	 Marriage certificate

**Your notes will be seen here by the employee**

1 Denied Upload a Document Associate an Existing Document Edit Preview

# Denied a Document by Accident- Steps to Correct

- Click on dependent/beneficiaries tab from the member's overview screen and select the dependent with the incorrect verified status.
- Update the verified status from No to Yes
- Then update the verified status back from Yes to No
- Go back to the document center and associate the document to the pending task to approve the document correctly.

[← Dependents / Beneficiaries](#)

 Spouse	
Verify this person for all benefits?	<input checked="" type="checkbox"/> No
Personal Information	<a href="#">Edit</a>
Full Name:	
SSN:	

# Approved a Document by Accident – Steps to correct

- Click on dependent/beneficiaries tab from the member's overview screen and select the dependent with the incorrect verified status.
- Update the verified status from Yes to No
- Go back to the document center and associate the document to the pending task.

< Dependents / Beneficiaries



Spouse

Verify this person for all benefits?  **Yes** 

Personal Information ✎ Edit

Full Name:

SSN: