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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.

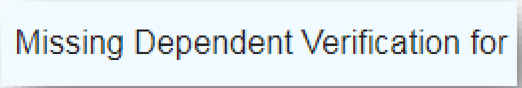
Document Center FAQ's

- 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:



Located on HBR To-Do List:

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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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

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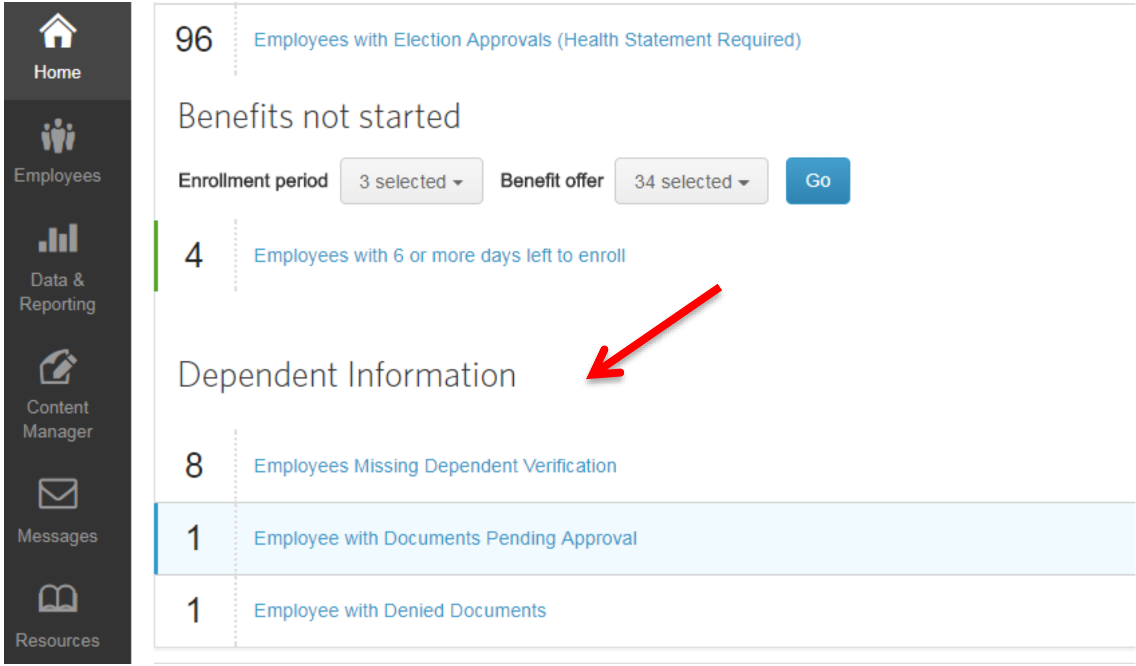
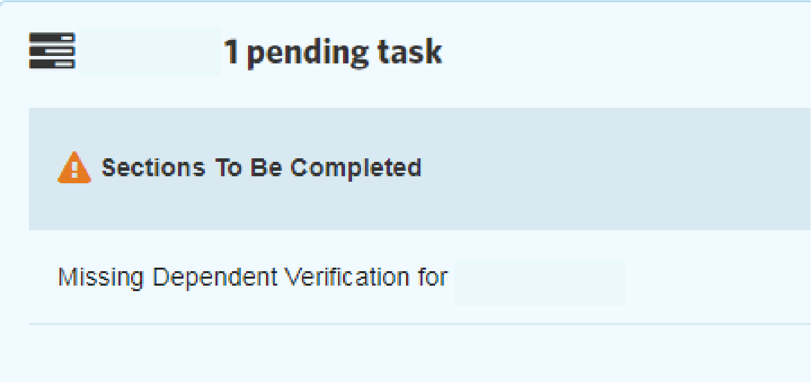
To-Do List / Task list

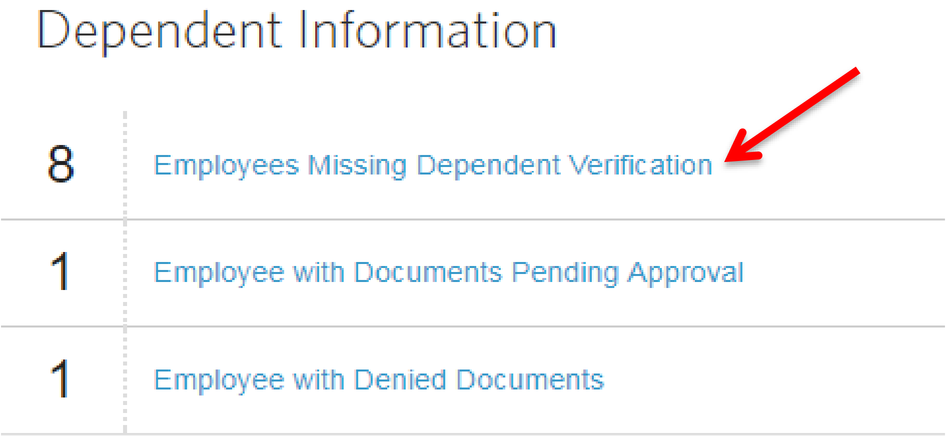
- As the HBR you can view all tasks regarding documentation from the task To-Do list.



Types of Documentation Tasks

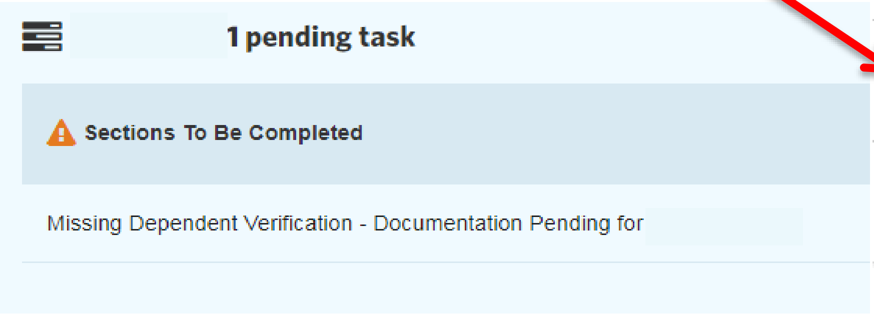
- **Missing Documentation:**
  Employees who have added dependents to coverage, but have not added documentation

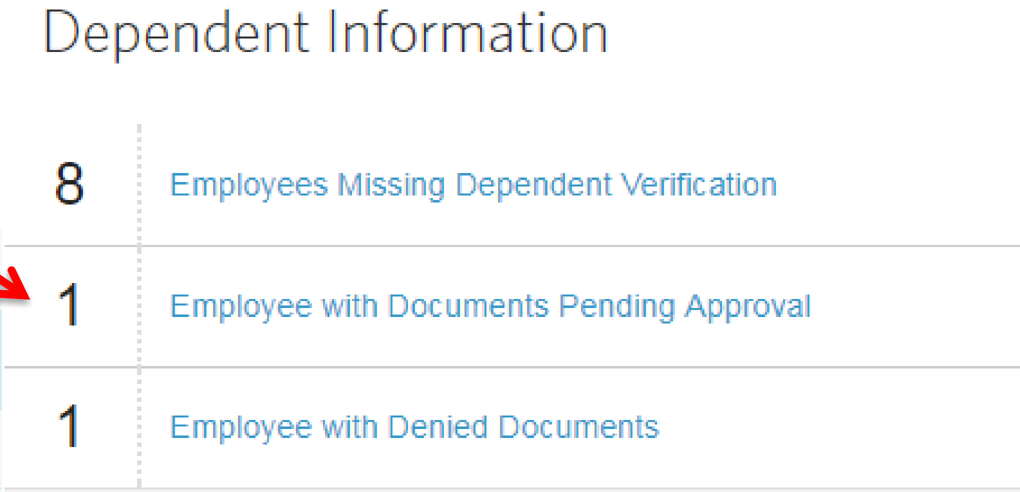




Types of Documentation Tasks

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





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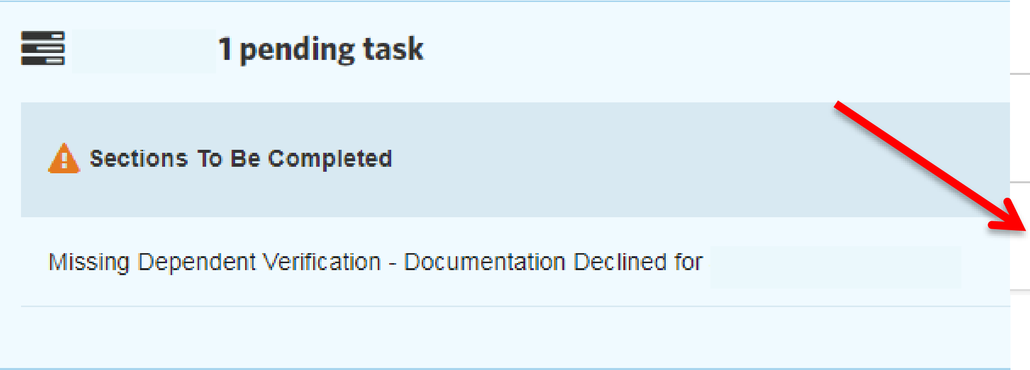
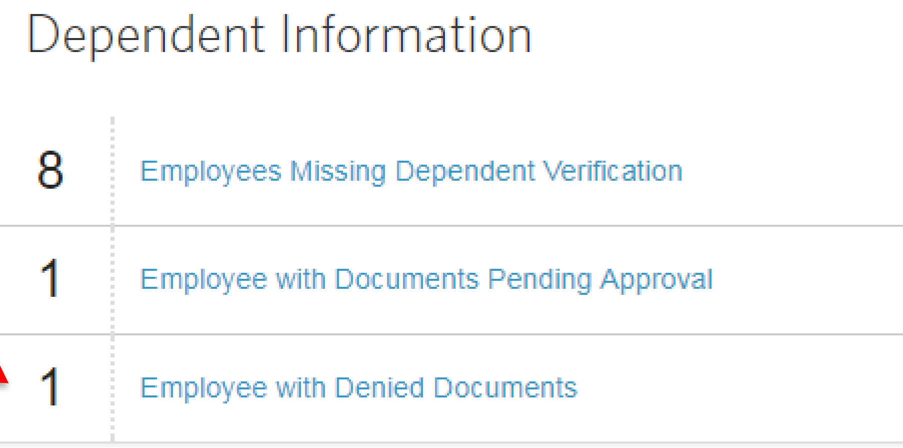
Types of Documentation Tasks

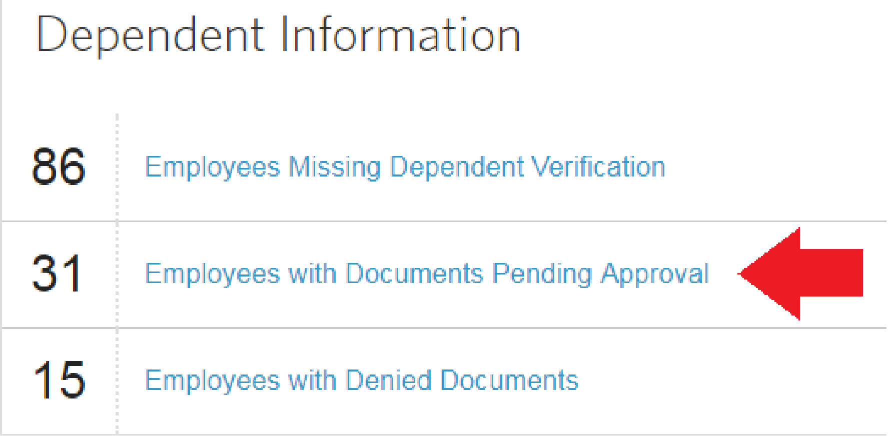
- **Declined Documentation-** Employees' documentation has been denied, and has not yet been corrected.





Reviewing Member’s Documents from the To-Do list

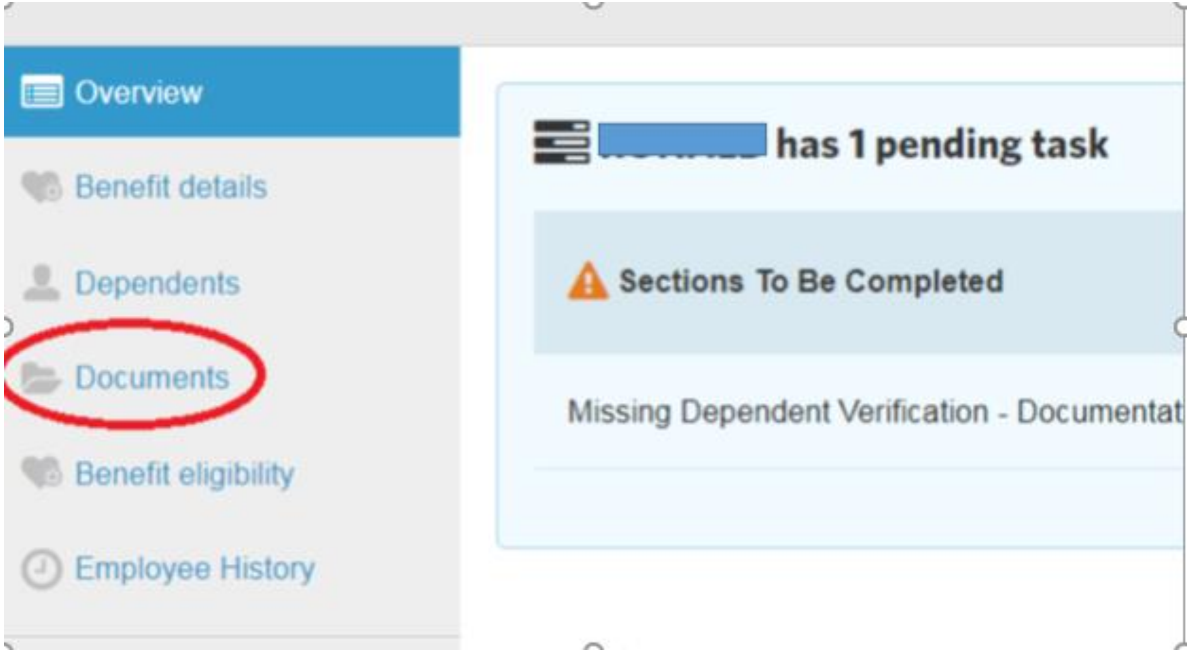
- To review the uploaded pending documentation for a particular member from the To-Do List, you can click on Employees with Documents Pending Approval.



- 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.

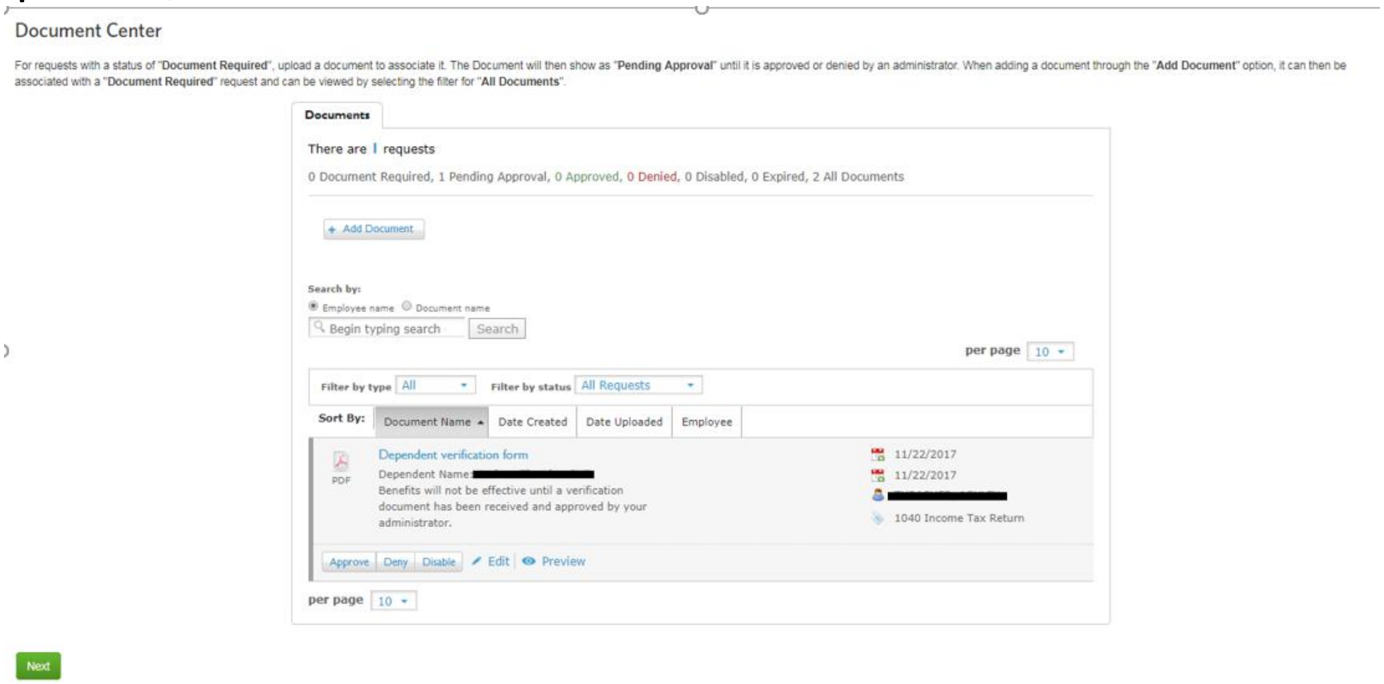
Reviewing Member’s Documents from the To-Do list

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



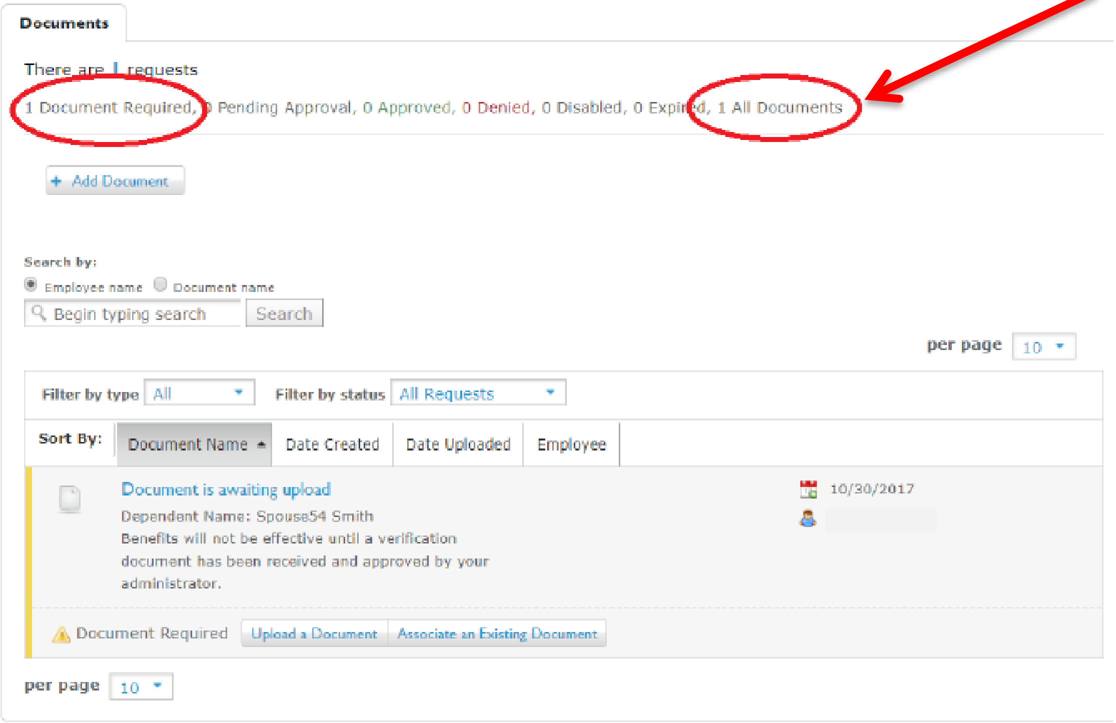
Reviewing Member's Documents from the To-Do list

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



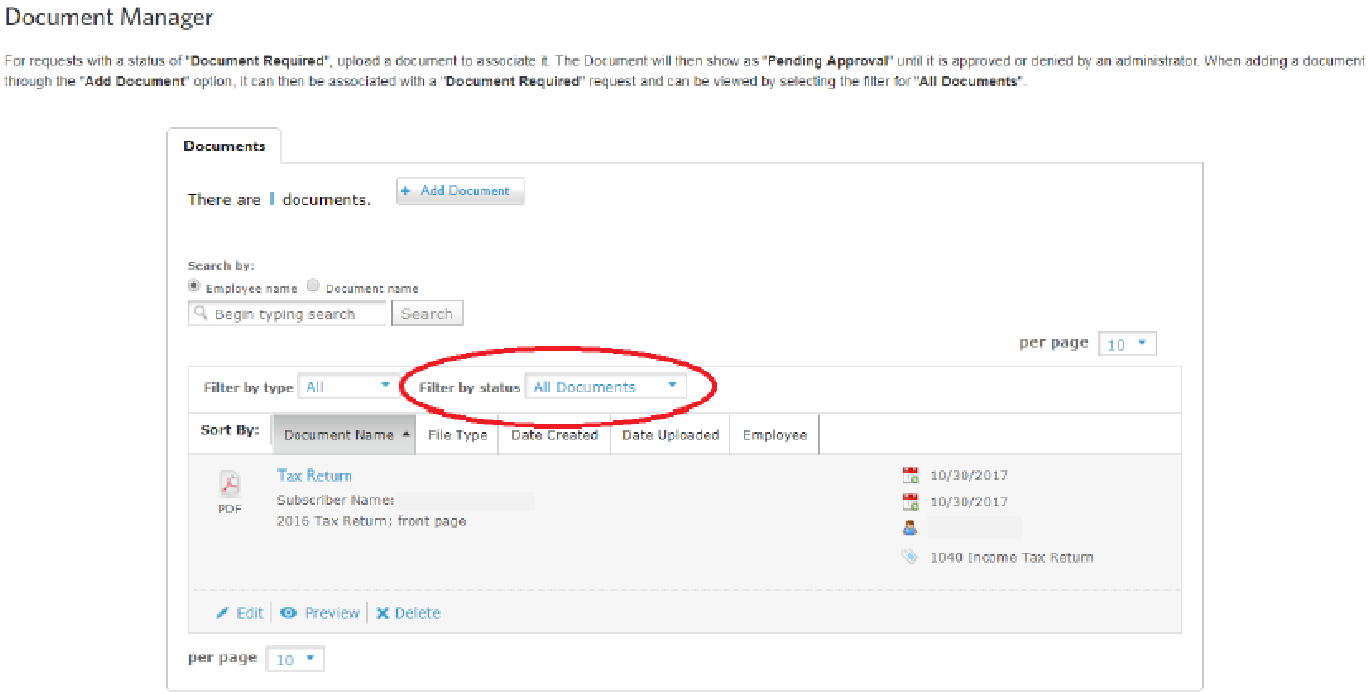
Documents have been uploaded, but not able to be seen

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



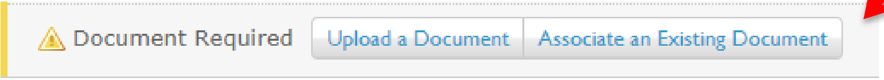
Documents have been uploaded, but not able to be seen

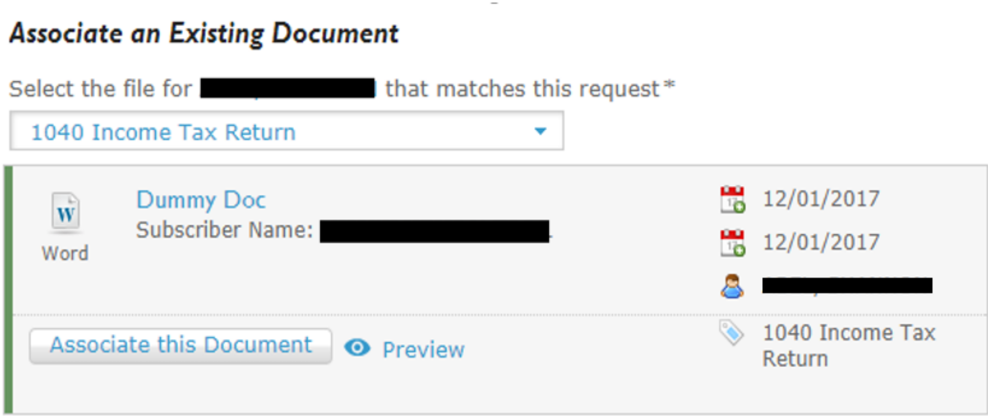
- Step 2: To view all documents uploaded, filter on "Filter by Status" to "All Documents"



Documents have been uploaded, but not able to be seen

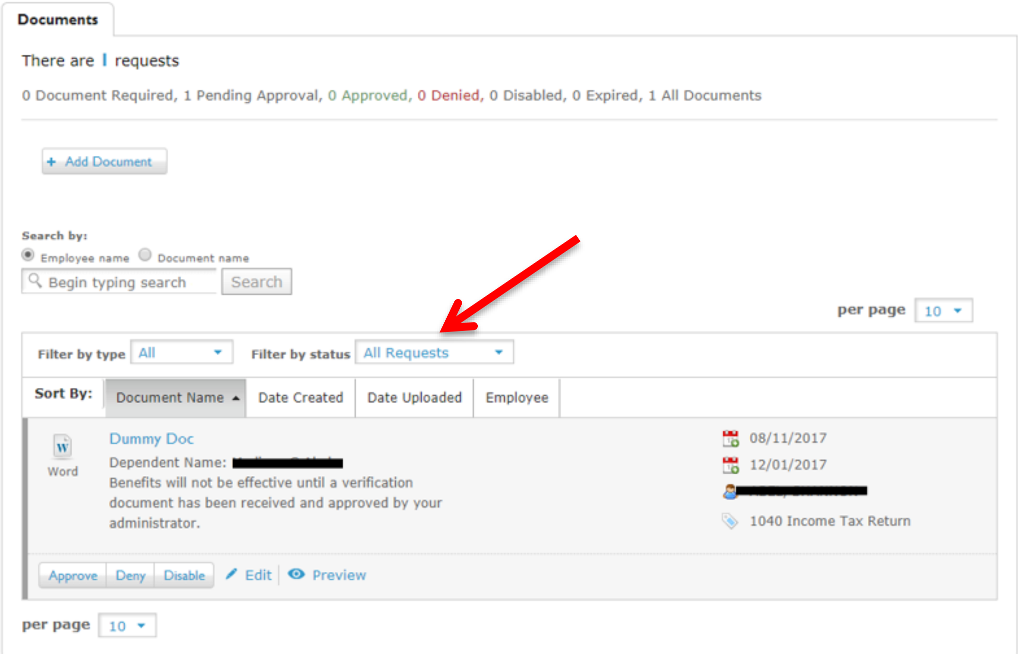
- If the document is within the "All Documents" section and is related to the pending task for the dependent, the document has not been associated to the task. To do this click "Associate an Existing Document". Select from the drop down the type of document that was uploaded. Then select associate this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





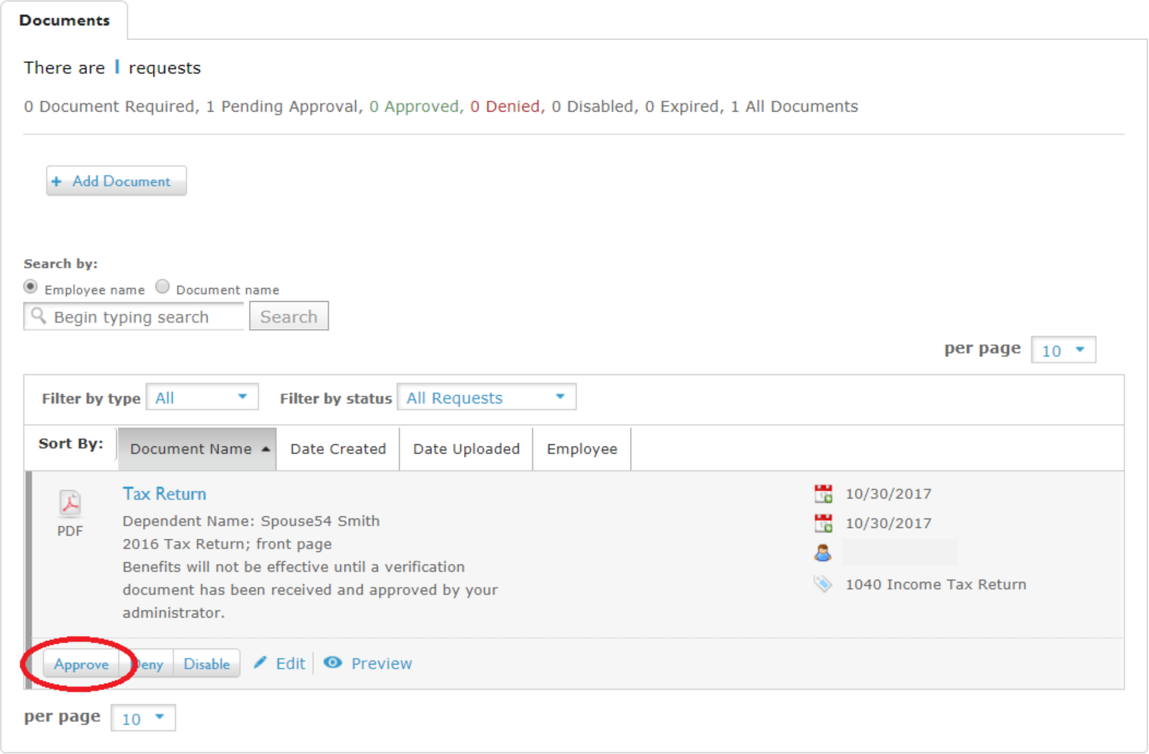
Documents have been uploaded, but not able to be seen

- 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.



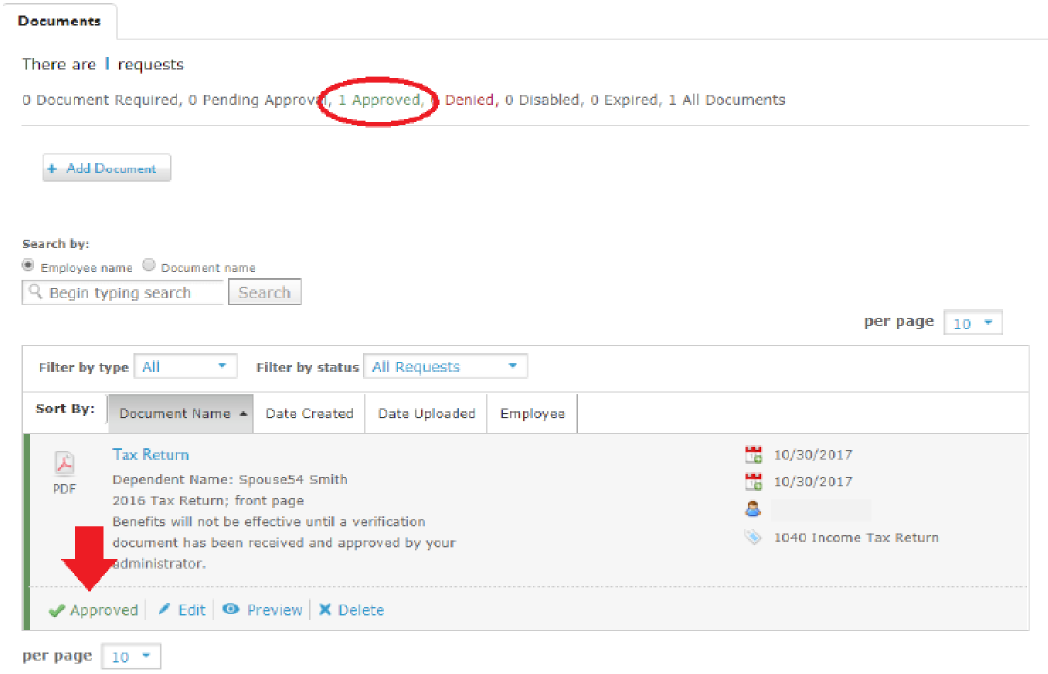
Approve Documentation

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



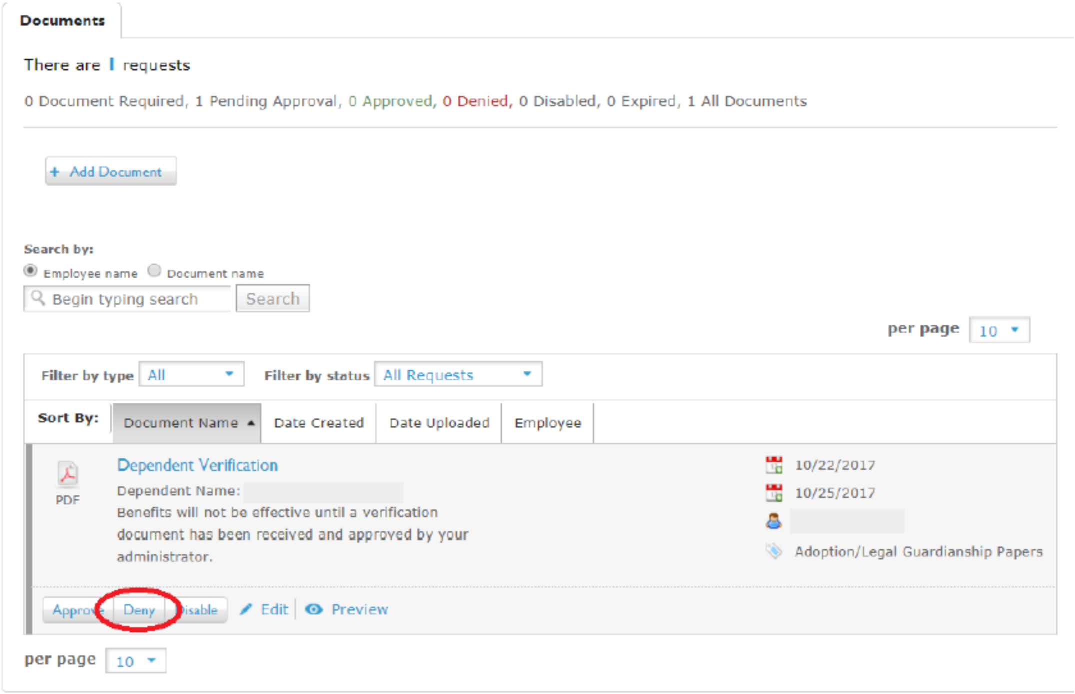
Approve Documentation

- 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.



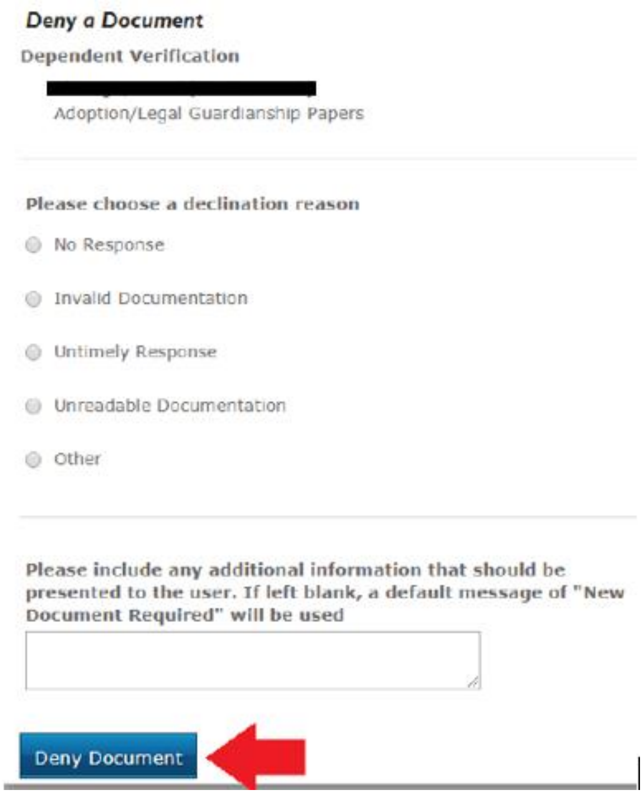
Denying Documentation

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



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.



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

New Activity in Document Center

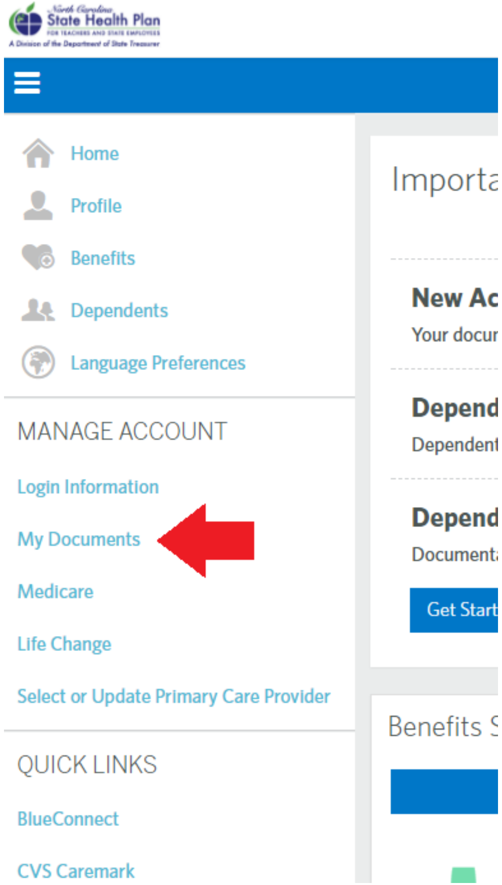
Your document has been denied, and a new document should be uploaded. Access My Document Center to submit now.

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.

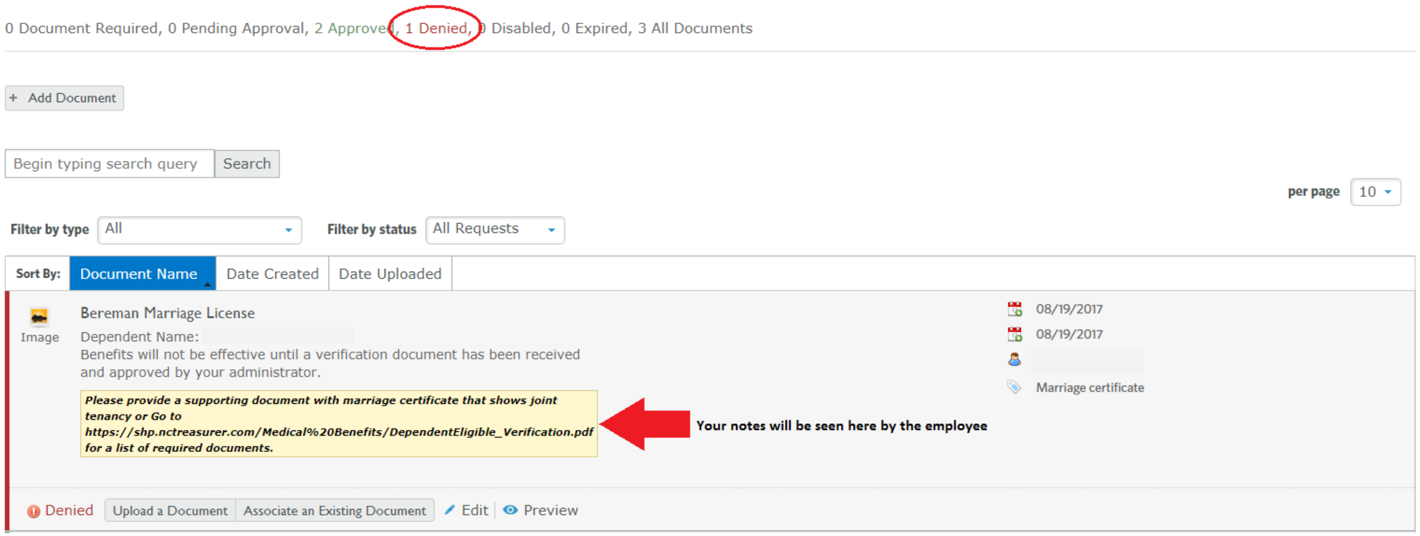
Denied Documentation (Employee View)

- 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.



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.



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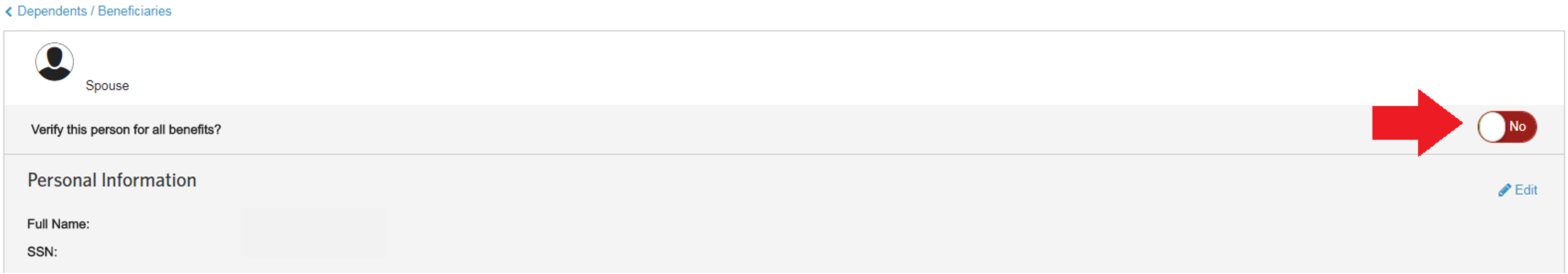
Denied a Document by Accident- Steps to Correct

- 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.



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.