

Navigating eBenefits



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State Health Plan
FOR TEACHERS AND STATE EMPLOYEES
A Division of the Department of State Treasurer

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)*

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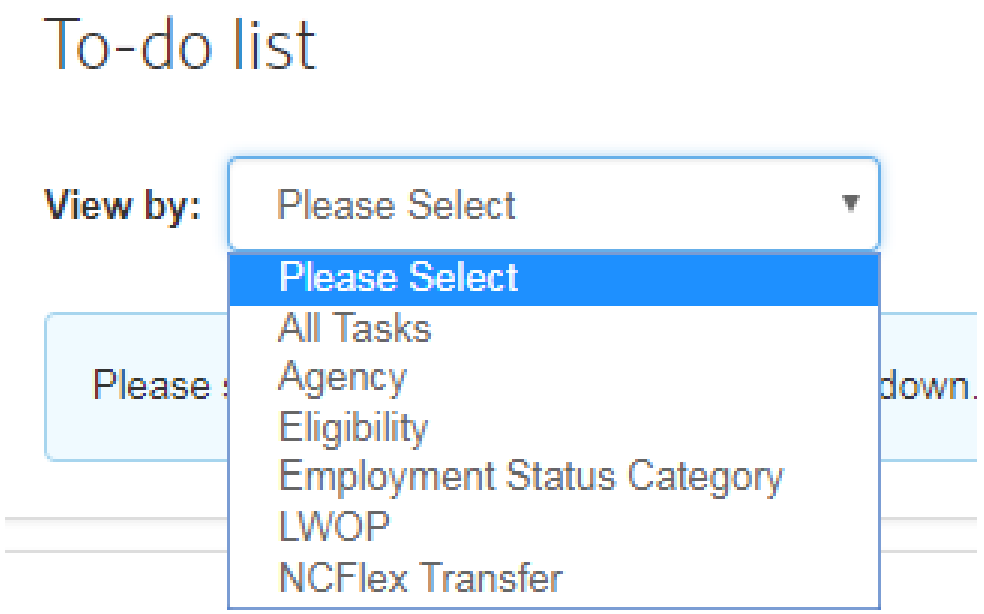
Managing the To-Do List

- 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*.
- <u>*Note:* For very large employer groups, no tasks will display by default.</u> You will need to select an option from the *View by* drop-down box to display all tasks or specific categories of employees.



***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 ▾ Go

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

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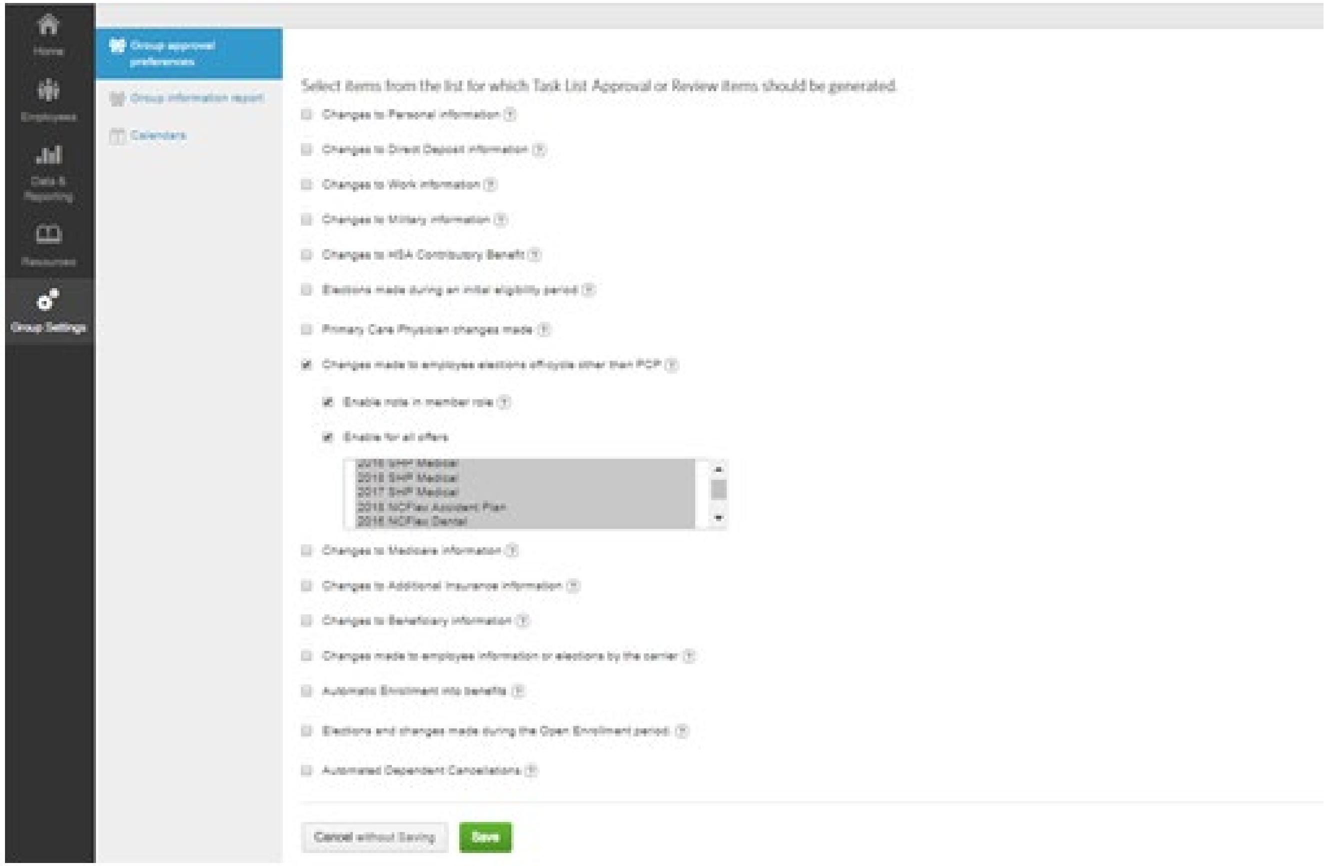
To-Do List Preferences

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.



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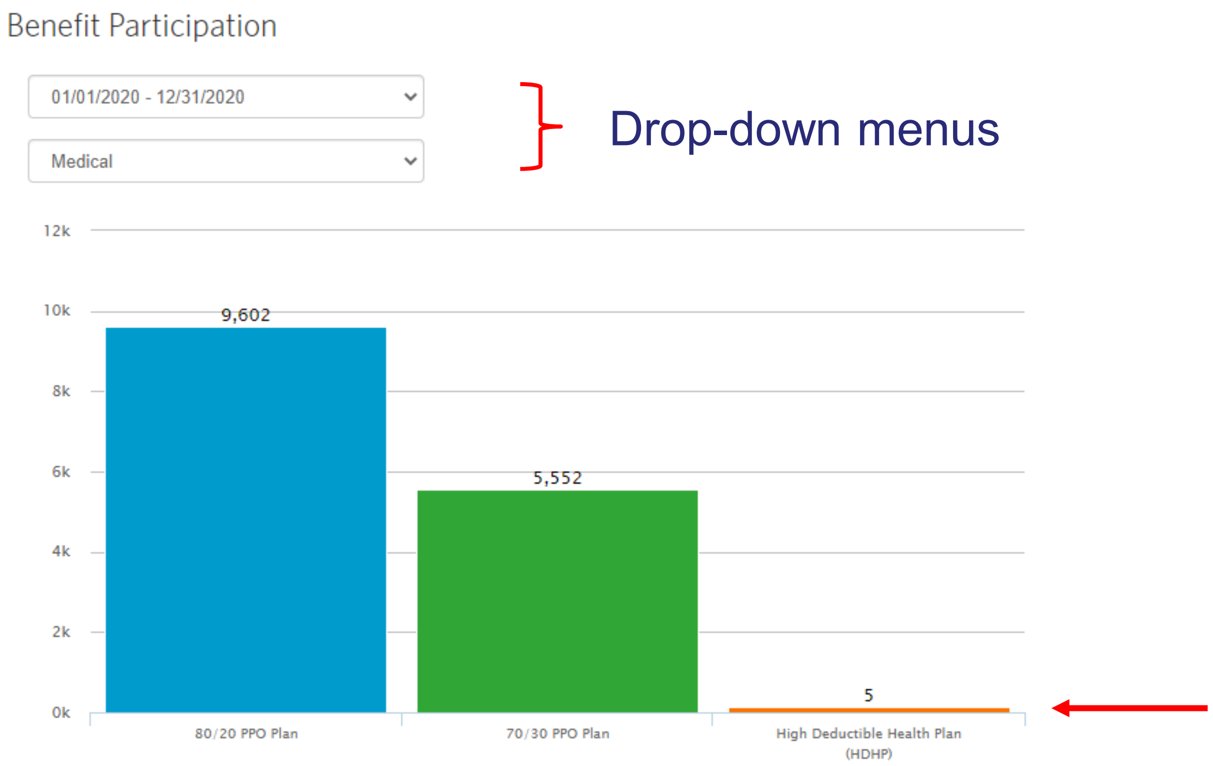
Viewing Benefit Enrollment

- 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:



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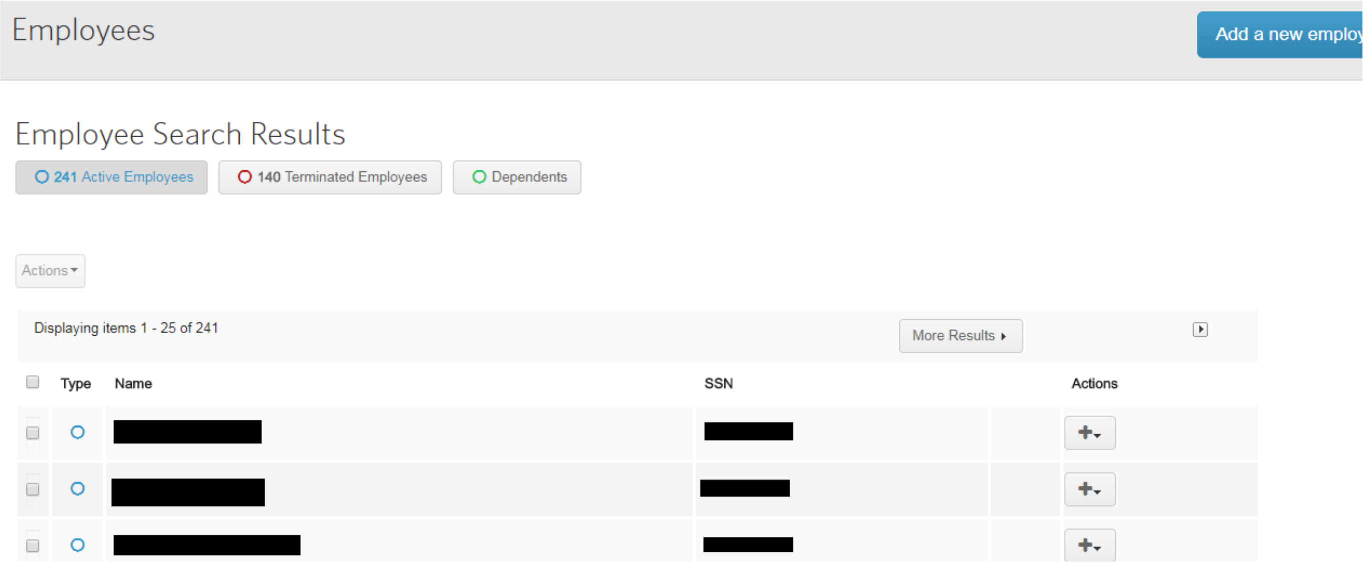
Viewing Benefit Enrollment – Under 1,000 Enrollees

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



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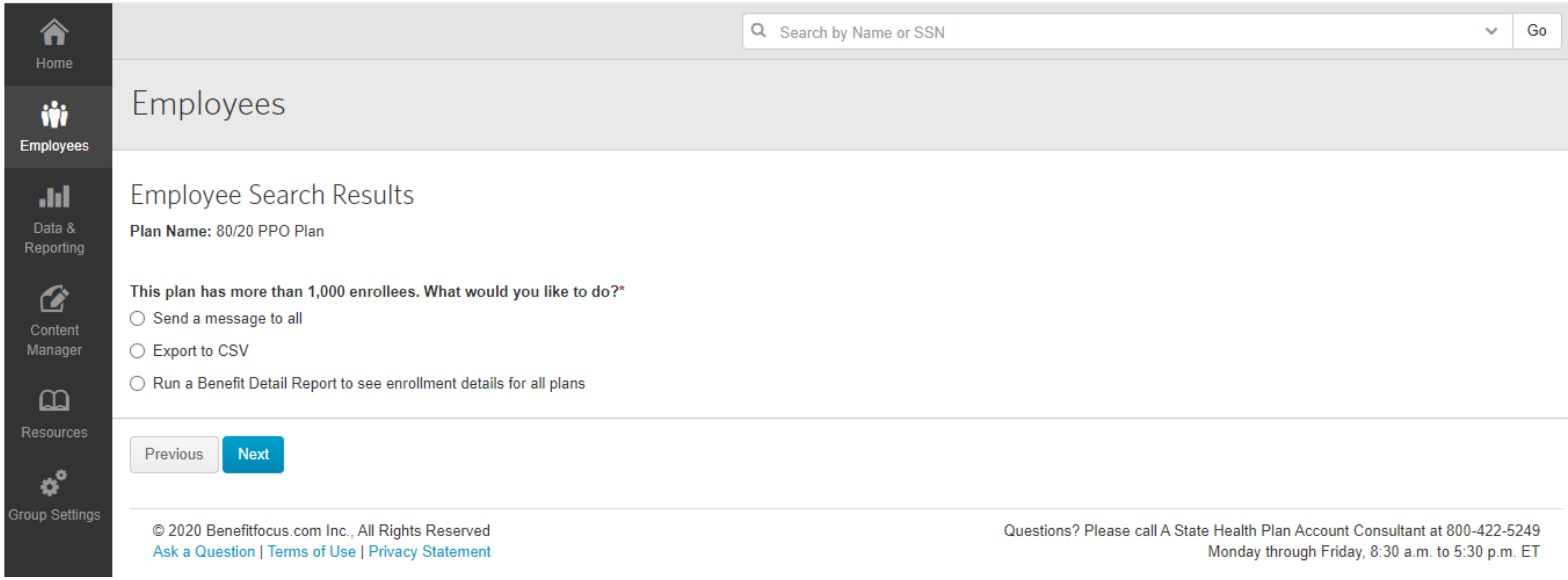
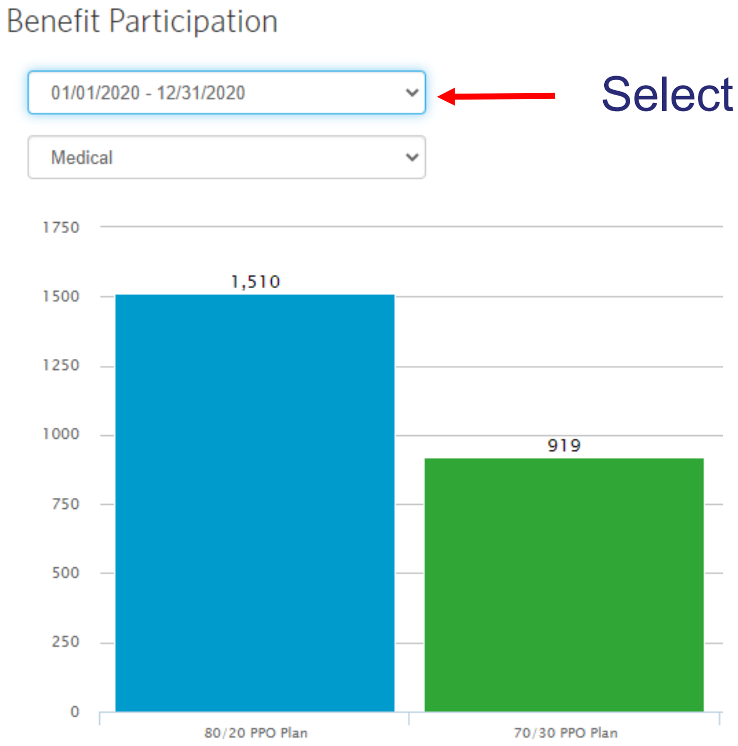
Viewing Benefit Enrollment – Over 1,000 Enrollees

- 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



Comparing Benefit Plan Counts

- 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.



Select the desired plan year

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

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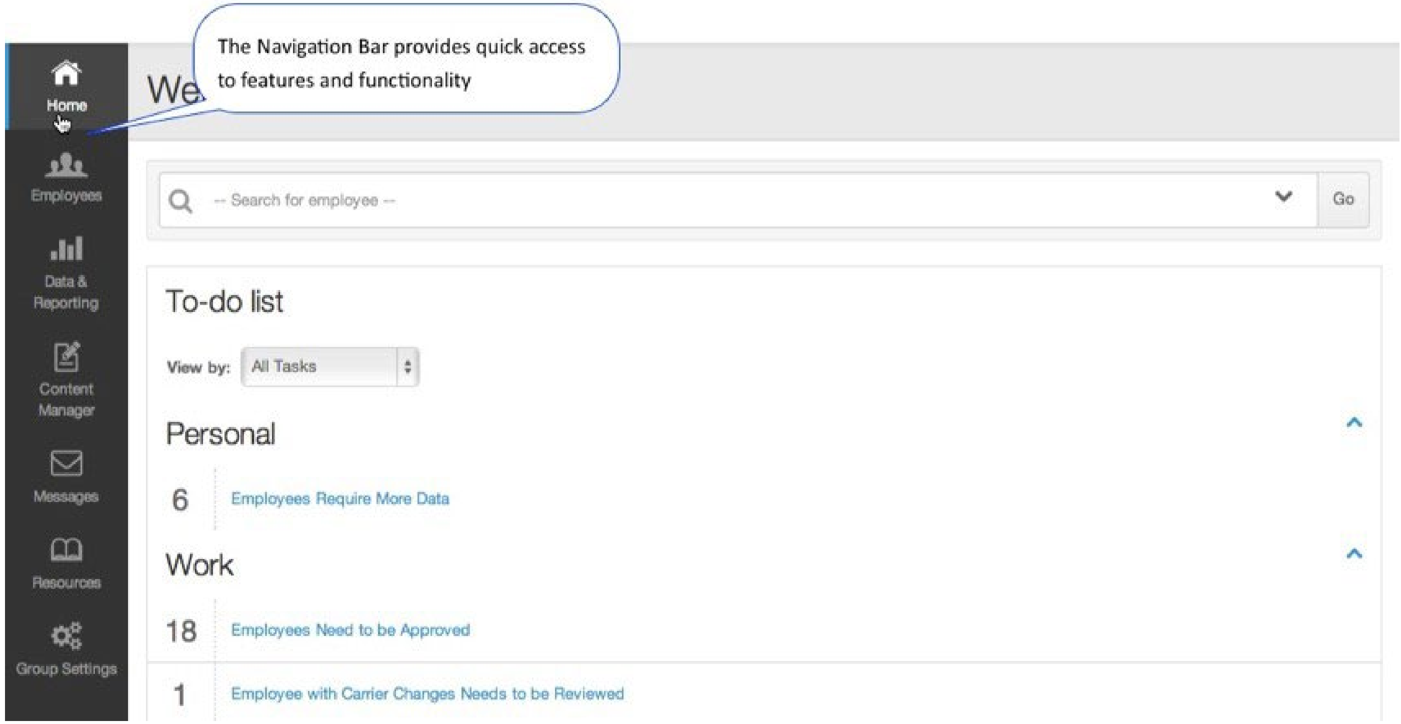
Using Navigation Tabs

- 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.



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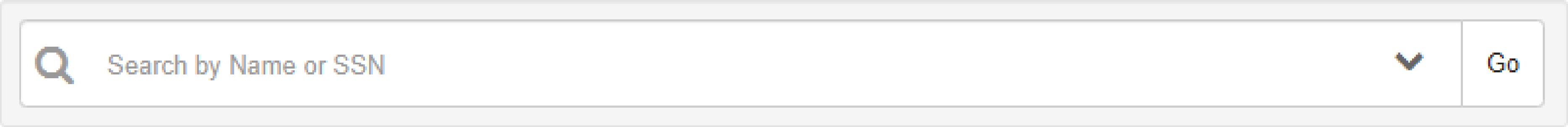
Searching for Employees

- 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.



- 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.

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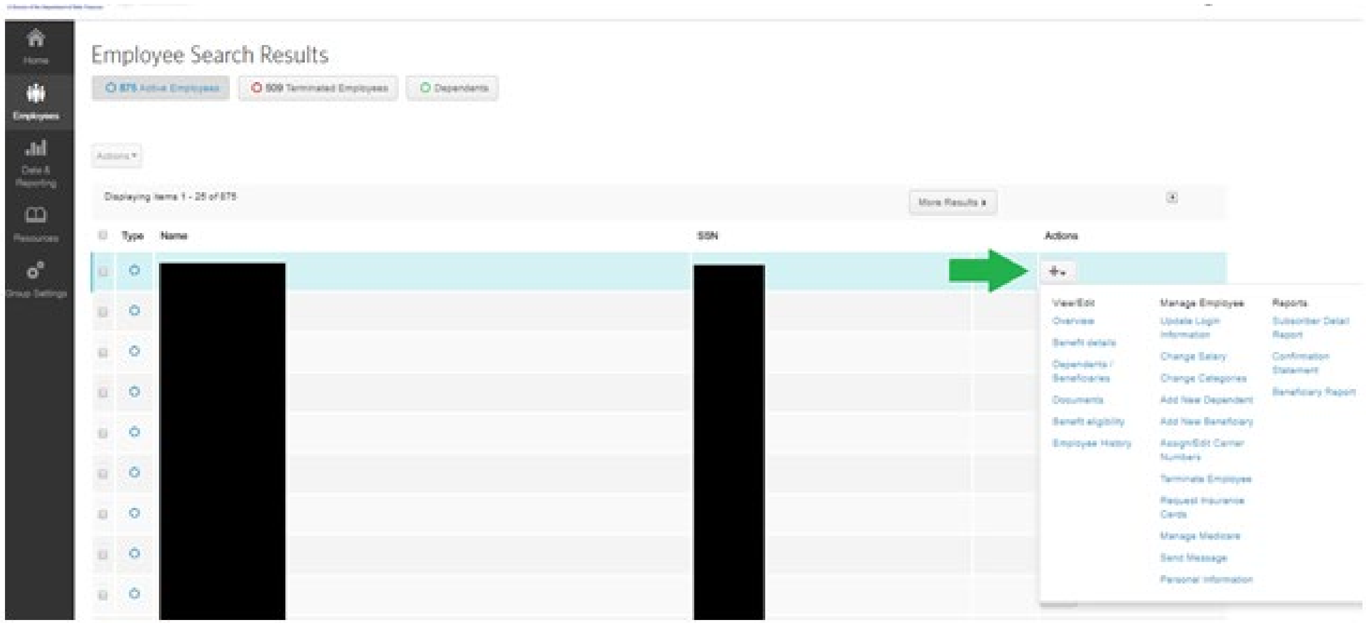
Steps to Perform a Search

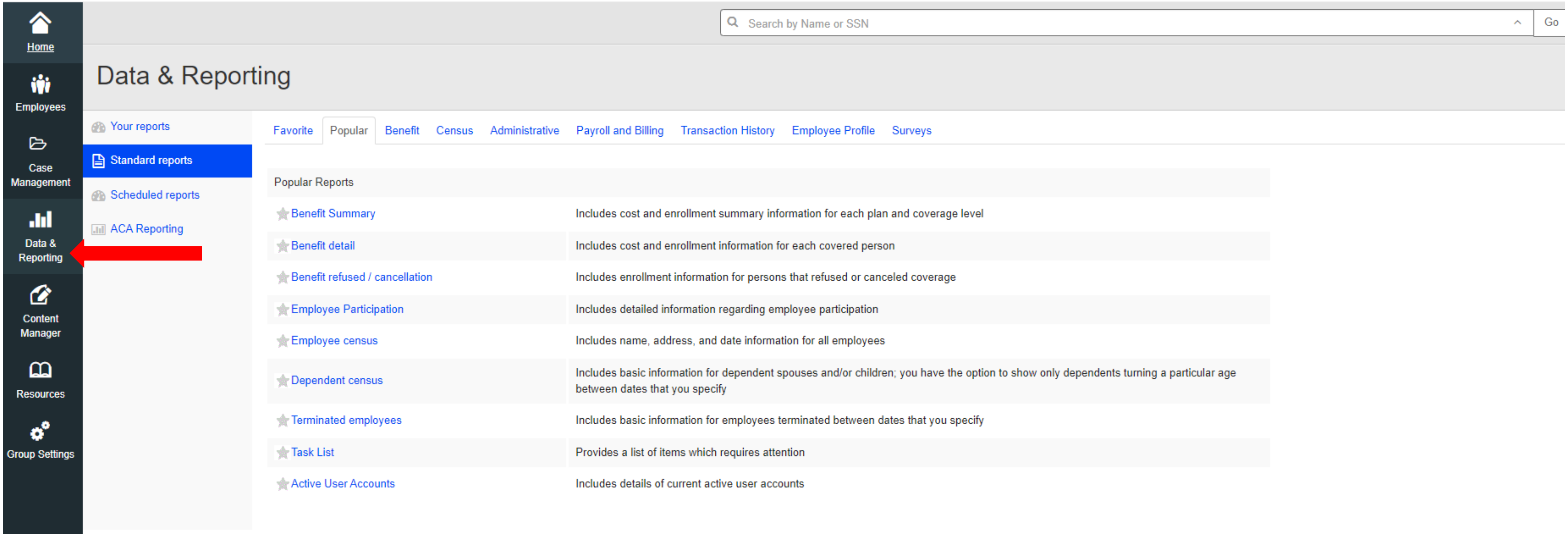
1. Enter the first few characters or the full criteria in the search field (example: *smi* or *smith* for a *Name* Search). The search is not case sensitive.
2. Select *Go* or press *Enter*. The *Employee Search Results* page provides you with a list of employees who meet the criteria entered into the 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.*



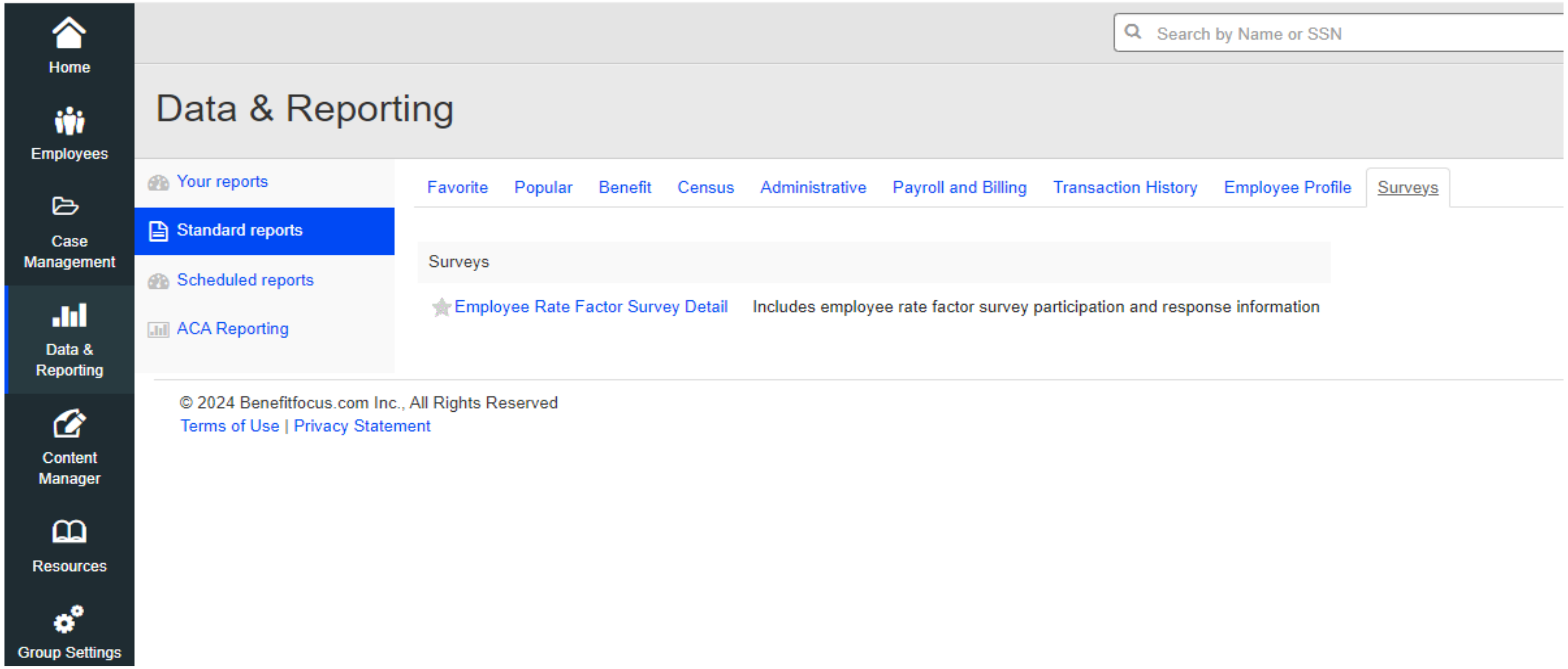
Create a Report

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



TAU List

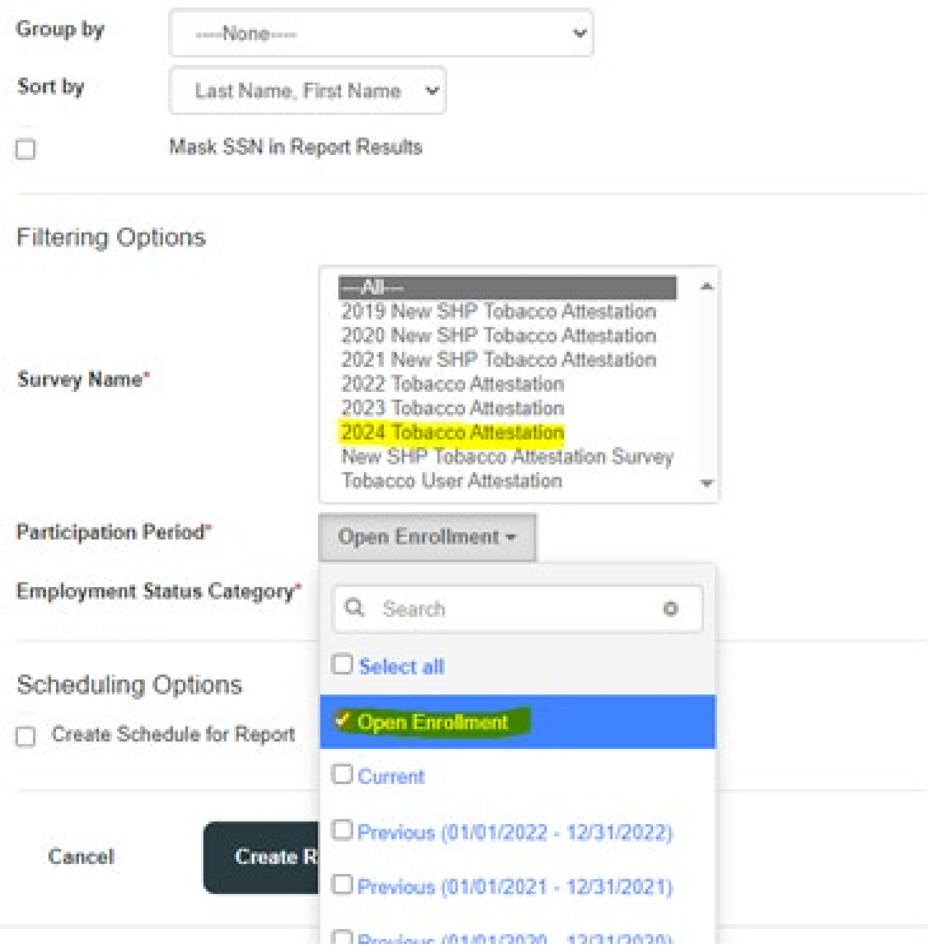
HBRs can create a report that identifies employees who are subject to provide a Tobacco Cessation Verification document in order to maintain the $60 Premium Wellness Credit.



- 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



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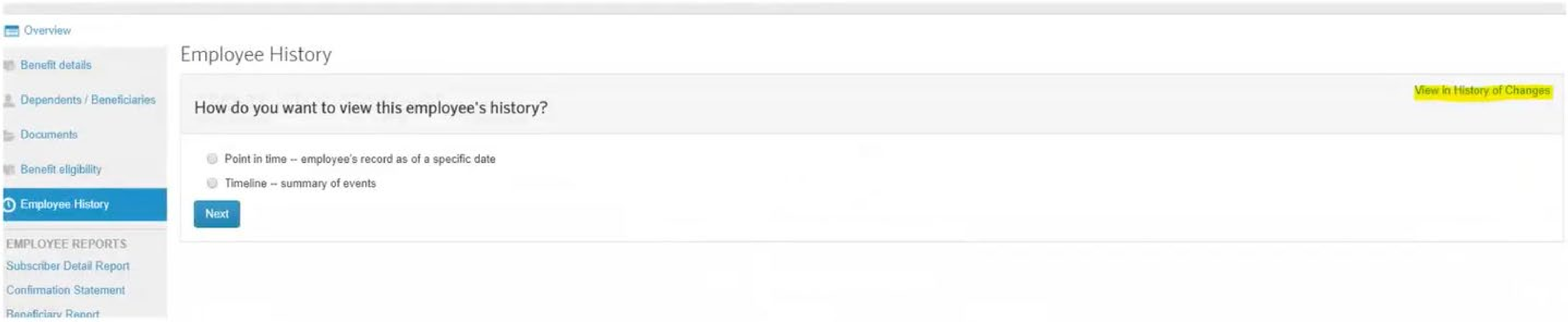
History of Changes Overview

- 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.



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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

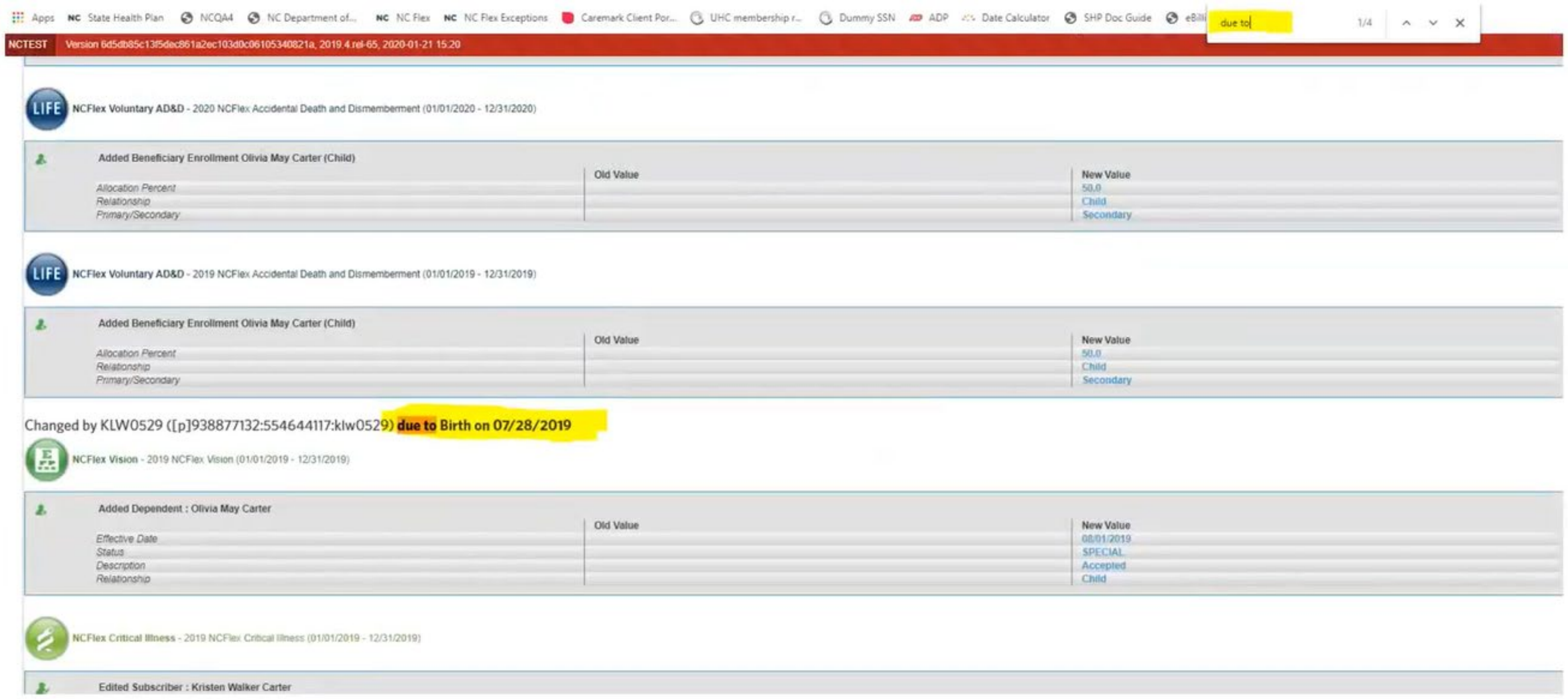
- DATASYNC
  - Change that was made by iTEDIUM file
    - Non-Payments for those in a Direct Bill employment status category
  - TPA file where Medicare information is added or for PCP updates

- 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.



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 Benfitfocus 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.

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