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

STATE TREASURER OF NORTH CAROLINA
DALE R. FOLWELL, CPA

# HBR Monthly Webinar

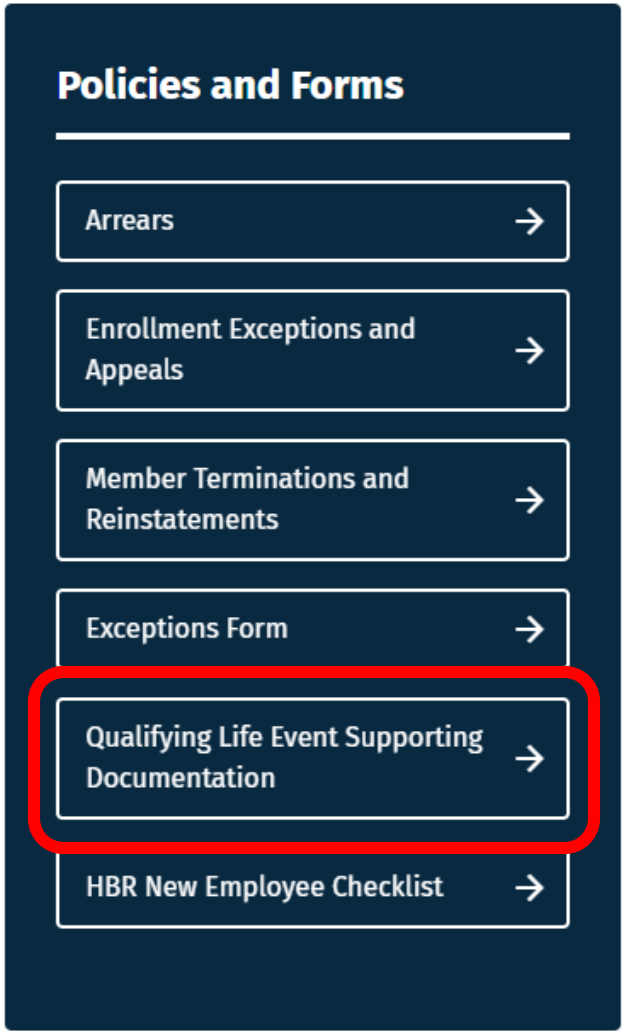
**May 15, 2019**

# Agenda

- Updated QLE Supporting Documentation List
- Keep eBenefits Access Active
- History of Changes Report
- eBenefits Task Management via To-Do List
- Retire Employees Timely
- Benefitfocus OnePlace Case Survey
- On-Site Trainings
- Open Enrollment Trainings – Coming Soon!

# QLE Supporting Documentation List

- The State Health Plan list of required documentation for Qualifying Life Events & Dependent Eligibility has recently been updated.
- Certain types of documentation have been updated along with images of acceptable and unacceptable documentation.
- The updated list may be found on the Plan's website, in the Policies and Forms box, located in these sections under the HBR tab:
  - Enrollment Information
  - Exceptions Process
  - Training and Development
- This should be the only list you refer to when confirming whether or not submitted documentation is sufficient.



# Keep Your eBenefits Access Active!

- eBenefits accounts that are not used regularly could be targets of attack since it is less likely any changes (such as a changed password) will be noticed. As such, these accounts are at risk of being exploited and used to access data.
- Accounts that have been inactive for 90 days will be disabled.
- If your eBenefits access is disabled, you will need to follow the steps outlined in the Training and Development section under the HBR tab to regain access.
- Whenever anyone in your employing unit with eBenefits access leaves the position and no longer needs eBenefits access, you must **immediately** notify HBRInquiries@nctreasurer.com so their access can be terminated.
- Logins should NEVER be shared or transferred among employees.
- A list of all users along with their last logins can be found in eBenefits by going to Standard Reports, Administrative tab, Active User Accounts.
- Access for eBilling currently does not require training, but access will also be disabled after 90 days of inactivity.

# Employee History of Changes Report

- Employee history of changes shows all updates entered in eBenefits including entry date, time and Login ID.
- Review full details in the **HBR Benefits Administrator Guide** on the Training and Development page under the HBR tab of the Plan's website or in the Resource Center of HBR University.
- Complete the following steps to view an Employee History of Changes report:
  - Search for and select an employee & click the *Employee History* link.
  - Then click *View in History of Changes* link.
  - Enter the range of dates for the changes you want to see.
  - Select type of changes to view & formatting options.
  - Then click *Run* to create the report which will open automatically.

**Employee History of Changes**

PRINT CLOSE

**Start Date** 03/26/2019

**End Date** 04/25/2019

**Report Date** 04/25/2019

**Include**
- Personal, Dependent, Work, Medicare, Survey
- All

**View** Most recent changes at top

[+] Expand All

## 04/25/2019

Hide

### 11:40 AM

Hide

**Medical** - 2019 SHP Medical (01/01/2019 - 12/31/2019)

**Edited Enrollment**

| | Old Value | New Value |
|---|---|---|
| *Coverage Level* | Employee Only | Employee and Family |

**Edited Dependent : Spouse36 RobTest6925**

| | Old Value | New Value |
|---|---|---|
| *Effective Date* | | 05/01/2019 |
| *Expiration Date* | 04/25/2019 | |
| *Original Effective Date* | | 05/01/2019 |
| *Description* | Initial Refusal | Accepted |

**Edited Dependent : Child06 RobTest6925**

| | Old Value | New Value |
|---|---|---|
| *Effective Date* | | 05/01/2019 |
| *Expiration Date* | 04/25/2019 | |
| *Original Effective Date* | | 05/01/2019 |
| *Description* | Initial Refusal | Accepted |

**Edited Enrollment**

| | Old Value | New Value |
|---|---|---|
| *Employee Cost* | $300.00 | $7,176.00 |
| *Employee Premium* | $1,020.00 | $7,896.00 |

**Added Enrollment**

| | Old Value | New Value |
|---|---|---|
| *Coverage Level* | | Employee Only |
| *Initial Eligibility Date* | | 05/01/2019 |
| *Plan Name* | | 70/30 PPO Plan |
| *Waive Wait Period* | | No |

**Added Subscriber : Joy RobTest6925**

| | Old Value | New Value |
|---|---|---|
| *Creditable Coverage Adjusted* | | No |
| *Effective Date* | | 05/01/2019 |
| *Original Effective Date* | | 05/01/2019 |
| *Status* | | TIMELY |

# Managing the To-Do List in eBenefits

- 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.
- 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

# Retire Members Timely

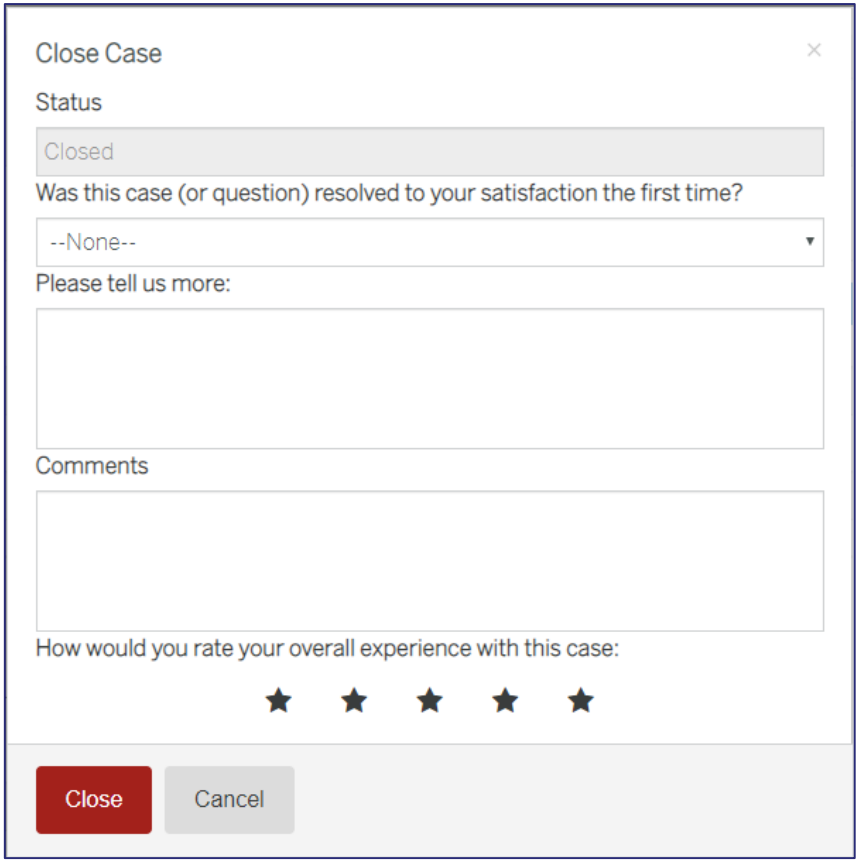
- The Plan typically sees an increase in retirements and terminations during the months of June and July.
- Please terminate retiring employees as soon as you are notified of their retirement date. Terminations due to retirement should be processed at least 30 days before the retirement date.
  - For example, a member retiring 8/1 with benefits ending 8/31 would need to be processed no later than 7/1 by the HBR.
- Timely processing ensures that the Medicare-eligible members are offered the UnitedHealthcare Medicare Advantage plans as an option. If the termination is not processed timely, Medicare-eligible members will be defaulted to the 70/30 Plan, which may not be their choice.
- For more information on processing these actions in eBenefits, please review details on the HBR Training and Development page.
- If additional benefit changes are needed after the termination is processed but before the last day of coverage on the active group, HBRs may contact HBR Support at 800-422-5249, create a case via One Place 365 or contact your Account Manager.

# OnePlace Case Survey

- Benefitfocus would like to capture feedback via an optional case survey to track trends, feedback, and opportunities noted by HBRs.
- A Benefitfocus Account Manager will set a case to the “pending client action” status after responding which will trigger an automatic email notification if it remains in this status for 16 business hours.
- HBRs and Benefitfocus can continue to communicate back and forth on a case prior despite any status updates. Benefitfocus will update the status if deemed necessary.
- Benefitfocus Account Managers will not close cases after replying and rely on HBRs to review feedback, comment, and/or close the case when appropriate.
- Commenting on a closed case will not reopen the case or notify Benefitfocus. A new case will need to be opened in this instance.

# OnePlace Case Survey

- Click **OnePlace 365** from eBenefits Home page
- Click **Cases** on the left-hand ribbon from the OnePlace 365 dashboard
- Review **My Open Cases**
- Click **Close Case**
- Finally, review the optional survey



# On-Site HBR Trainings Going on Now!

- The State Health Plan will continue to host in-person trainings through June.
- These sessions are great for a refresher as topics will include:
  - ✓ eBenefits Overview & Reports
  - ✓ eBilling
  - ✓ Benefits
  - ✓ Documentation & QLEs
- Visit the HBR Upcoming Trainings page for location details and to register.

- Regional HBR Trainings:
  - May 17 in New Hanover County
  - June 24 in Watauga County
- Specialized HBR Trainings:
  - June 25 in Caldwell County

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# Open Enrollment Trainings – Coming Soon!

- The State Health Plan will host 2020 Open Enrollment onsite training sessions and webinars in July and August.
- These sessions will review plan options and changes to assist HBRs in educating employees through the Open Enrollment process.
- We will be sending more detailed information in regards to dates, locations and times soon.

# Thank You!

# *Questions?*

This presentation is for general information purposes only. If it conflicts with federal or state law, State Health Plan policy or your benefits booklet, those sources will control. Please be advised that while we make every effort to ensure that the information we provide is up to date, it may not be updated in time to reflect a recent change in law or policy. To ensure the accuracy of, and to prevent the undue reliance on, this information, we advise that the content of this material, in its entirety, or any portion thereof, should not be reproduced or broadcast without the express written permission of the State Health Plan.

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