

SHBP ENROLLMENT PORTAL: ADP USER GUIDE ADMIN EXPERIENCE (AGENCIES USING THE DATA SHARING TOOL)

Version 5
Rev. 12/6/2013



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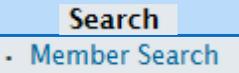
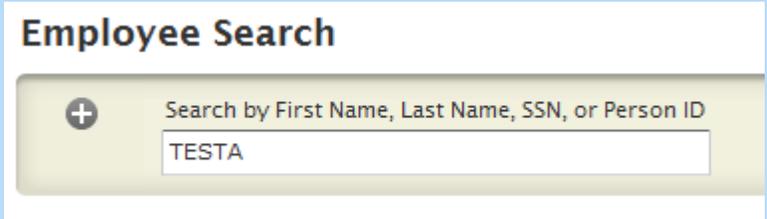
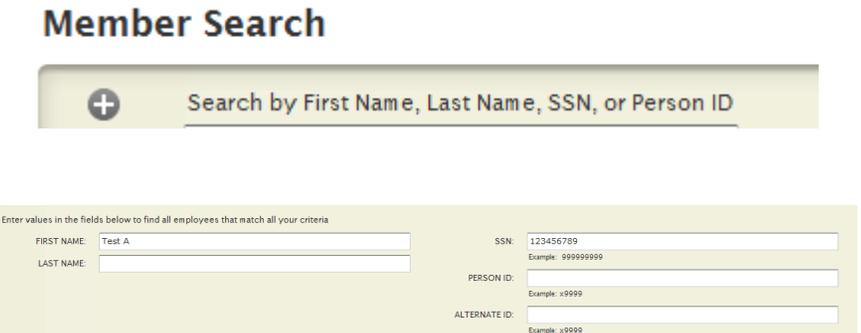
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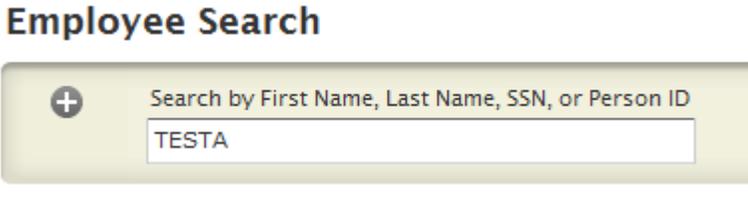
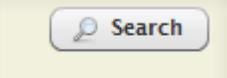
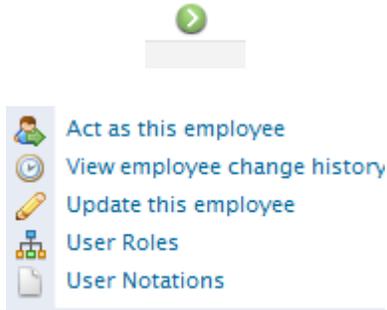
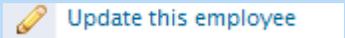
Note: Please ensure that you only have one instance of the SHBP Enrollment Portal site open at one time. Working on multiple instances will cause a system error.

MEMBER SEARCH

Member Search provides a brief overview on the function and types of searches that can be done in the system.

Note: Admins will only have access to the member population their security access has been set to.

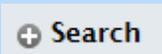
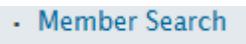
Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the “Member Experience” User Guide for the process.
2	Click + next to the Search button to expand.	
3	Choose Member Search .	
4	<p>There are two types of search available:</p> <ul style="list-style-type: none"> • Basic Search accepts a full or partial last name (using % as a multi-character wild card, as needed) or a complete Social Security Number (SSN) <p>**This User Guide uses the Basic Search type. **</p>	
5	<p>The Second Search is the Advance Search.</p> <ul style="list-style-type: none"> • Advance Search accepts full or partial first or last names as well as a complete SSN. <p>In Employee Search click the + and then enter the details desired.</p>	

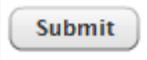
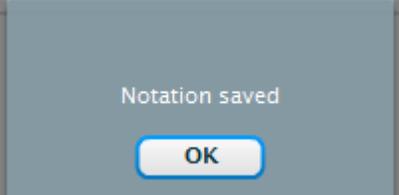
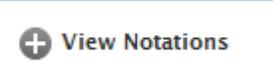
<p>6</p>	<p>Enter member criteria to search.</p> <p>**This User Guide uses the Basic Search type. **</p>	
<p>7</p>	<p>Click Search.</p>	
<p>8</p>	<p>The search results will display.</p> <p>Please note: Person ID is an ADP assigned number only; no impact to SHBP.</p>	
<p>9</p>	<p>Click the green arrow in front of the desired member, and several options will display.</p> <p>Note: User Roles feature will not be seen by all Admins.</p>	
<p>10</p>	<p>Act as this employee returns you to the Welcome page with the notice that you are “Acting as <member name>”. This enables you to:</p> <ul style="list-style-type: none"> - Make elections on behalf of the member - Declare Life Events - Review Current Enrollment and Employee Profile screens 	
<p>11</p>	<p>View employee change history Navigates to the Employee Profile page, from which you can also view the Summary and Timeline pages for this member.</p>	
<p>12</p>	<p>Update this employee</p>	

	Navigates to the Data Sharing Tool which allows updates to add or edit member indicative data.	
13	User Notations Allows an Admin to enter notes on a member's account.	 User Notations

USER NOTATIONS

The **User Notations** feature allows an Administrator to enter notes on a member’s account.

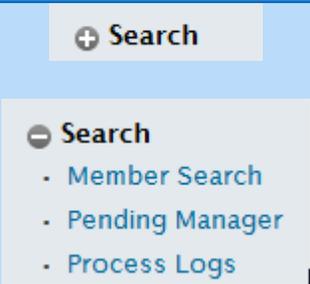
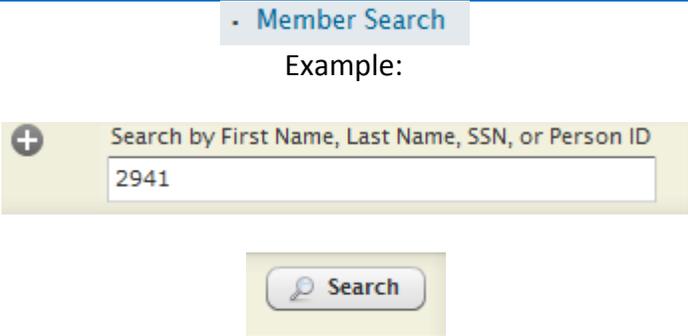
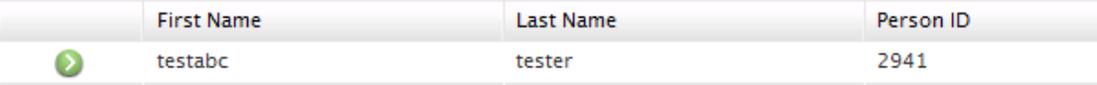
Steps	Process Flow Instructions	Screen Shot												
1	Log on to the SHBP Enrollment Portal.	See the “Member Experience” User Guide for the process.												
2	Click Search .													
3	Choose Member Search from the drop down box.													
4	Enter the appropriate member details.													
7	The search results will display.	 <table border="1" data-bbox="898 1008 1997 1057"> <thead> <tr> <th>First Name</th> <th>Last Name</th> <th>Person ID</th> <th>SSN</th> <th>Status</th> <th>Hired</th> </tr> </thead> <tbody> <tr> <td>TESTA</td> <td>TEST</td> <td>3068</td> <td>XXXXX5785</td> <td>Active</td> <td>05/06/2013</td> </tr> </tbody> </table>	First Name	Last Name	Person ID	SSN	Status	Hired	TESTA	TEST	3068	XXXXX5785	Active	05/06/2013
First Name	Last Name	Person ID	SSN	Status	Hired									
TESTA	TEST	3068	XXXXX5785	Active	05/06/2013									
8	Click the green arrow, and several options will display. Note: The User Roles feature will not be seen by all Admins.	 <ul style="list-style-type: none"> Act as this employee View employee change history Update this employee User Roles User Notations 												

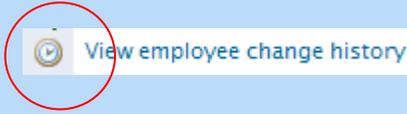
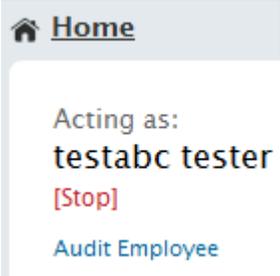
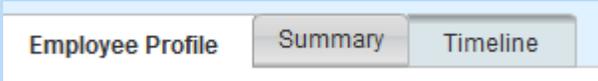
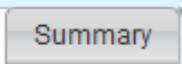
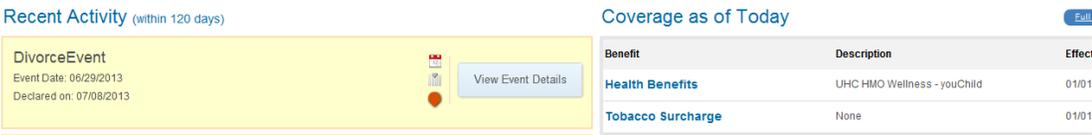
<p>9</p>	<p>Choose User Notations, and enter the notes* desired for the member.</p> <p>*4k Character limitation.</p>									
<p>10</p>	<p>Choose Submit to save comments to the system.</p>									
<p>11</p>	<p>Confirmation of saved notation will display.</p>									
<p>12</p>	<p>To view historical notes in the system, click View Notations, and expand the icon.</p>									
<p>13</p>	<p>Previous notes will display.</p>	<p>Notation History for BOBBY ZEE (51fe701f-0ba3-4302-a157-d40f9d)</p> <table border="1" data-bbox="1037 1133 1850 1247"> <thead> <tr> <th></th> <th>Time</th> <th>Entered By</th> <th>Notation</th> </tr> </thead> <tbody> <tr> <td></td> <td>06/14/2013 04:16:18 PM</td> <td>CALLCOUNSEL20</td> <td>test message.</td> </tr> </tbody> </table>		Time	Entered By	Notation		06/14/2013 04:16:18 PM	CALLCOUNSEL20	test message.
	Time	Entered By	Notation							
	06/14/2013 04:16:18 PM	CALLCOUNSEL20	test message.							

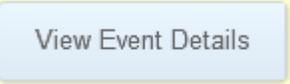
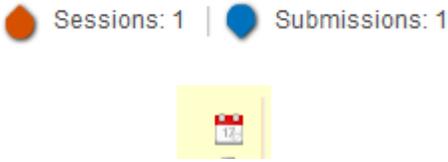
VIEW EMPLOYEE CHANGE HISTORY > AUDIT FEATURE

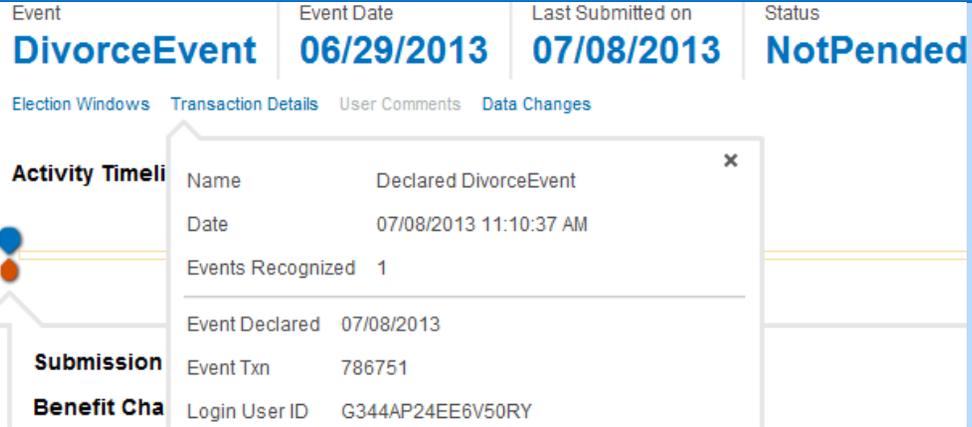
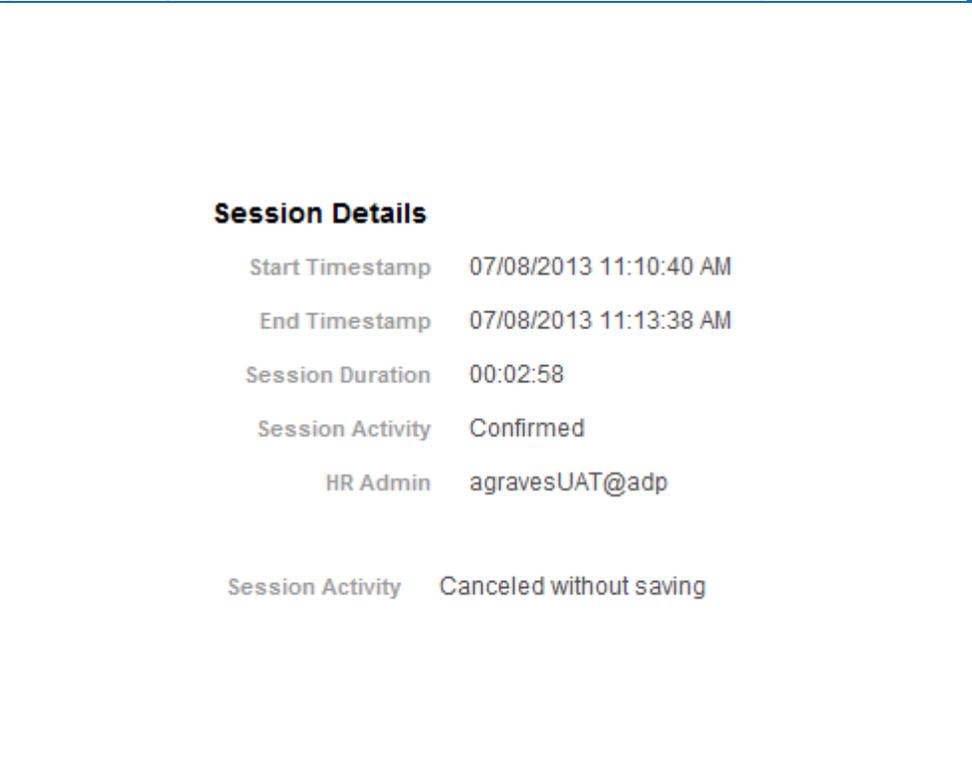
The **Audit Feature** navigates to the **Employee Profile** page, from which Administrators only also view the **Summary** and **Timeline** pages when acting as a member.

Critical: Only Admins can use **Audit** capabilities.

Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the “Member Experience” User Guide for the process.
2	Click + next to the Search button to expand.	
3	Choose Member Search , and enter the member criteria that you want to review. Click Search . Note: Basic Search feature is utilized in screen shot.	
4	Search results will display.	Example: 

<p>5</p>	<p>Click the green arrow in front of the desired member.</p>	
<p>6</p>	<p>There are two ways to View Employee Change History.</p> <p>Option 1 to click the clock icon.</p>	
<p>7</p>	<p>OR choose Option 2 to View employee change history/Audit.</p> <p>On left hand side of the screen, choose Audit Employee.</p>	
<p>8</p>	<p>Regardless of what option is chosen, the first page that displays is Employee Profile.</p> <p>This will house all of the employee demographic information.</p> <p>Note: The Employee Profile is also available to the member from the right-hand navigation bar.</p>	
<p>9</p>	<p>Click the Summary tab.</p>	
<p>10</p>	<p>The Summary tab lists recent activity on the left and current benefits and effective dates for the selected member and dependents on the right.</p>	

<p>11</p>	<p>Click View Event Details.</p>																									
<p>12</p>	<p>The View Event Details page opens a new page, and drills down to information about the benefit elections related to the event (i.e. what the member changed <i>from</i> and then changed <i>to</i>).</p>	 <table border="1"> <thead> <tr> <th colspan="8">Dependent Changes Made</th> </tr> <tr> <th>Name</th> <th>SSN</th> <th>DOB</th> <th>Relationship</th> <th>Sex</th> <th>Disabled</th> <th>Student</th> <th>Medical</th> </tr> </thead> <tbody> <tr> <td> BRIAN W POLK</td> <td>XXXXX4137</td> <td>06/06/1975</td> <td>Spouse</td> <td>M</td> <td>N</td> <td>N</td> <td>Y → N</td> </tr> </tbody> </table>	Dependent Changes Made								Name	SSN	DOB	Relationship	Sex	Disabled	Student	Medical	BRIAN W POLK	XXXXX4137	06/06/1975	Spouse	M	N	N	Y → N
Dependent Changes Made																										
Name	SSN	DOB	Relationship	Sex	Disabled	Student	Medical																			
BRIAN W POLK	XXXXX4137	06/06/1975	Spouse	M	N	N	Y → N																			
<p>13</p>	<p>This page shows all user activity (changes) related to the selected event, even if the user did not complete a benefit election. The colored icons represent the following:</p> <p><i>Red icon</i> — Refers to the number of sessions recorded in the web application, whether or not the election was submitted.</p> <p><i>Blue icon</i> — Refers to activity recorded and then election submitted. This page also includes Data Changes, which shows what benefits were changed by this event, with the change indicated in Before and After columns.</p> <p><i>Calendar</i> – Will take the Admin to the Timeline feature in the Audit screen.</p>																									

<p>14</p>	<p>Transaction Details shows what caused the change, such as an event or a file load.</p>	
<p>15</p>	<p>Session Details: Shows the amount of time a member is online for specific Qualifying Events.</p> <p>Session Activity: Confirmed means the member saved their elections.</p> <p>Session Activity: Canceled without saving means the member went online in an existing/open Qualifying Event and did not save the changes after entering the event.</p> <p>HR Admin: This will show who processed the enrollment.</p> <ul style="list-style-type: none"> • If HR ADMIN is listed as Call Counselor; this means the ADP Call Center Team made the change. • If HR ADMIN is listed as a 'user name' this means the election was made by someone with HR ADMIN access. 	

16 **Data Changes** shows what benefits were changed by this event, with the change indicated in Before and After Columns.

Click **Data Changes**.
This will enable an Admin to review quickly the before and after of the specific event saved.

Data Changes

Changes [Show all](#) | [Event only](#) ✕

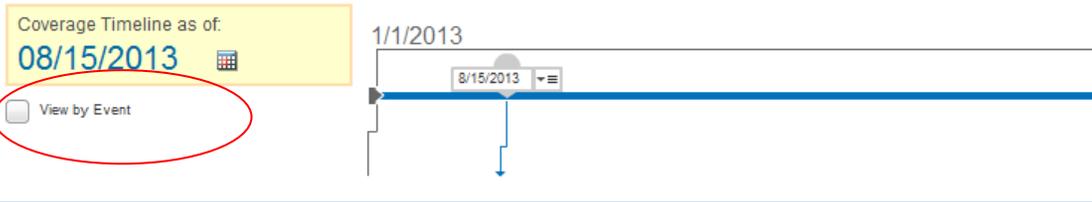
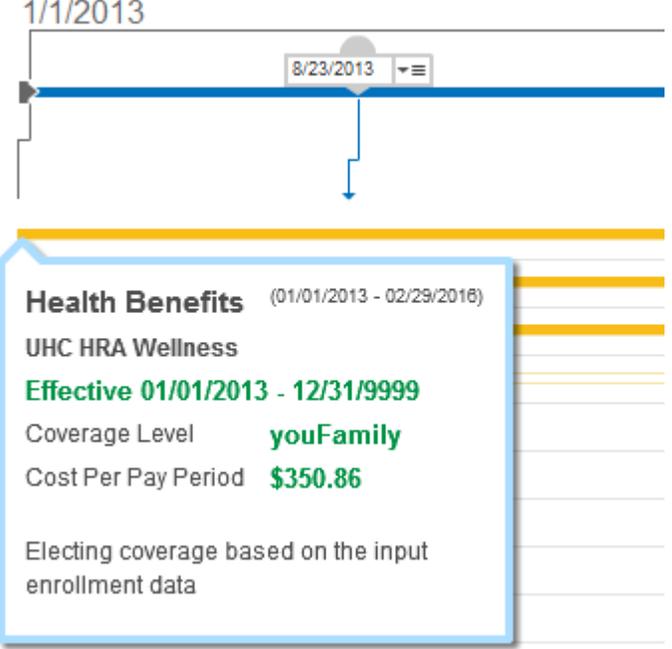
Source	Property	Before	After	Date
Subscriber	benefitEvent	true	false	06/29/2013
Subscriber	dependent	false	true	06/29/2013
Medical - MEDICAL-C4	defaultForEvent		false	06/29/2013
Medical - MEDICAL-C4	eligible	true	false	06/29/2013
Medical - MEDICAL-C4	offered	true	false	06/29/2013
Medical - MEDICAL-U4	defaultForEvent		false	06/29/2013
Medical - MEDICAL-U4	eligible	true	false	06/29/2013
Medical - MEDICAL-U4	offered	true	false	06/29/2013
Medical - MEDICAL-U3	defaultForEvent		false	06/29/2013
Medical - MEDICAL-U3	eligible	true	false	06/29/2013
Medical - MEDICAL-U3	offered	true	false	06/29/2013
Medical - MEDICAL-C1	defaultForEvent		false	06/29/2013
Medical - MEDICAL-C1	eligible	true	false	06/29/2013
Medical - MEDICAL-C1	offered	true	false	06/29/2013

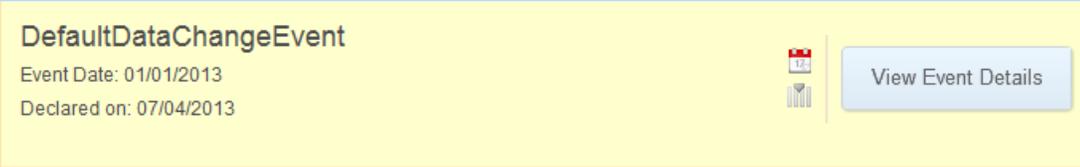
17 The **Timeline** tab shows coverages as yellow bars, with the overall time determined by how the blue timeline is set at the top. The yellow bars are divided into sections if coverages changed. Clicking a section of yellow line displays the coverage details for the period of time defined by the narrow white lines dividing the yellow bar. The coverages displayed depend on what was checked to the right of **Coverage Timeline as of <date>** in the **Summary** tab.

Employee Profile Summary **Timeline**

Coverage Timeline as of: **08/15/2013** 📅

View by Event

<p>18</p>	<p>Timeline: View by Event</p> <p>When an employee has more than one event on their account select View by Event.</p> <p>Select View by Event to review events on an individual basis. After checking the box all applicable events for the member will populate.</p>	
<p>19</p>	<p>Timeline > View By Event> Coverage Start and End Date</p> <p>By hovering over an event a pop up box will appear with additional details included Coverage start and End date that has been recorded into the system.</p>	

<p>20</p>	<p>Note: Summary Tab > Default Data Event</p> <p>This event encompasses items that are not defined by specific qualifying events (i.e. Birth, Marriage) but are sent to ADP via the normal Input file or use of Data Sharing Too.</p> <p>Examples of items that do not fall into a Qualifying Event. i.e. Email Change, Name Change.</p> <p>Utilize the Data Changes screen to view what changed on the account.</p>	 <p>DefaultDataChangeEvent</p> <p>Event Date: 01/01/2013 Declared on: 07/04/2013</p> <p>View Event Details</p>
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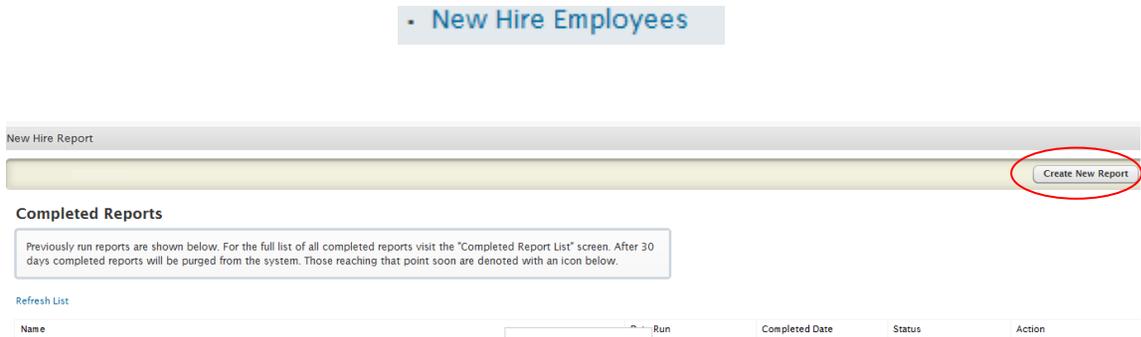
REPORTS

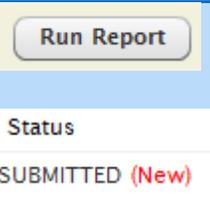
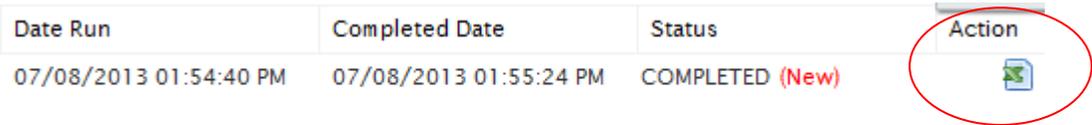
An Admin user with the appropriate security access will be able to run reports and view completed reports that they generated; the user cannot see reports generated by other users.

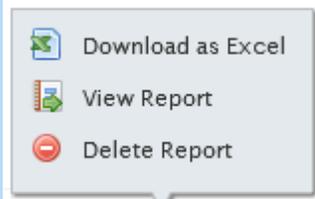
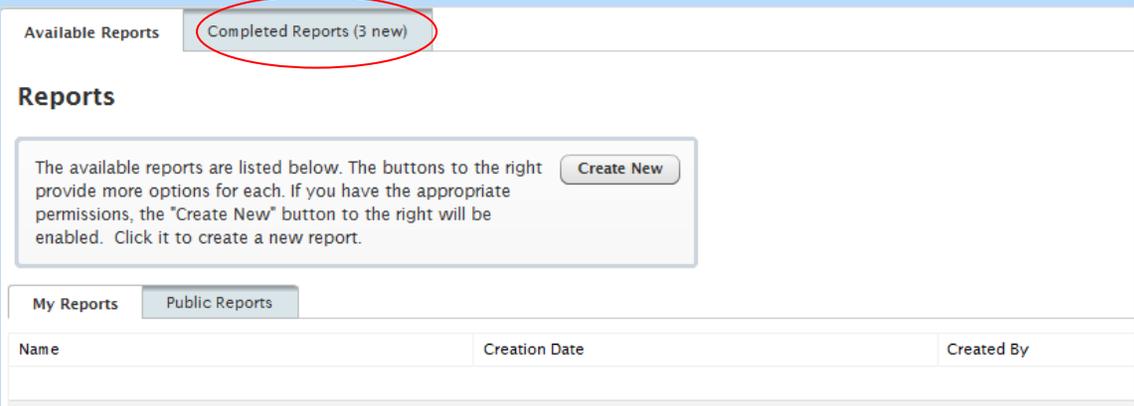
Note: This section will also define each report.

Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the “Member Experience” User Guide for the process.
2	On the Home page, click + next to Reports .	
3	Report availability will display based on Security access.	

<p>4</p>	<p>Definition of each Report:</p> <p>New Hire Employees: Lists current data about new hires and how many days remain for them to enroll.</p> <p>Benefit Enrollment/Benefit Elections Summary: Displays list of benefits, options, and coverage tiers, and start dates elected by a set of subscribers.</p> <p>Note: For this report the Payroll Location will lists <u>NAMES only</u>; not numbers at this time.</p> <p>Dependent Age Out: Displays data about dependents that are children or students and are about to reach maximum age limits.</p> <p>Census: Creates an off-line report containing a list of all employees, their dependents, and their benefits.</p> <p>Plan Migration: Names the options that have changed as a result of a global event such as annual enrollment, merger, or acquisition, counts the changes for each, and displays the subscribers for whom the options changed.</p> <p>Benefit Summary: Displays the list of benefits, options, and coverage tiers elected by sets of subscribers and the number of subscribers for each coverage level displayed.</p>	<div data-bbox="1276 581 1600 1015" style="background-color: #e0e0e0; padding: 10px; border: 1px solid #ccc;"> <p>– Reports</p> <ul style="list-style-type: none"> • New Hire Employees • Benefit Enrollment • Dependent Age Out • Census • Plan Migration • Benefit Summary • Enrollment Statistics • Create Report • Report Management </div>
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	<p>Enrollment Statistics: Retrieves aggregate data about eligible subscribers, percentages enrolled, and other tracking data.</p> <p>Report Management: Pending security access, this feature will list completed reports and allow for public reports to be utilized.</p>	
<p>4</p>	<p>To request a new report that is listed in the system click on the name of the report and then choose “Create New Report”.</p> <p>Screen shot is example.</p>	 <p>The screenshot shows a web interface for 'New Hire Employees'. At the top, there is a header with a blue bar containing the text 'New Hire Employees'. Below this is a section titled 'New Hire Report' with a light yellow background. On the right side of this section, there is a button labeled 'Create New Report' which is circled in red. Below this is a section titled 'Completed Reports' with a light blue background. It contains a text box with instructions: 'Previously run reports are shown below. For the full list of all completed reports visit the "Completed Report List" screen. After 30 days completed reports will be purged from the system. Those reaching that point soon are denoted with an icon below.' Below the text box is a 'Refresh List' link and a table header with columns: Name, Run, Completed Date, Status, and Action.</p>
<p>5</p>	<p>Use the drop down boxes for the information that you would like to search; each report will have specific criteria.</p> <p>Critical: HR ADMINS should select the Payroll Location in the Cost Center field to pull their specific Agency Reports.</p> <p>Note: The HR Admin running the report will only see Payroll Locations that they have security access to. However all Locations will</p>	 <p>The screenshot shows a search criteria panel with a light yellow background. It contains seven dropdown menus, each with a label and a downward arrow: 'Hire Date Range' (set to 'ALL'), 'Location', 'Department', 'Company', 'Division', 'Union', and 'Cost Center'.</p>

	<p>be listed; but reports generate based on the security of the Payroll Location/Cost Center.</p>									
<p>6</p>	<p>Enter in the name of the report you would like to generate and enter an email in the next box.</p> <p>An email will be sent once the report is completed.</p>	 <p>Note: Due to the size and complexity of this report, it may take some time for the report to finish. You will be notified when it is complete.</p> <p>Report Name: <input type="text" value="New Hires in July"/></p> <p>Email Address: <input type="radio"/> Not Available <input checked="" type="radio"/> <input type="text" value="test.test@shbp.ga.gov"/></p>								
<p>7</p>	<p>Click On “Run Report”.</p> <p>Status of the report will show at the bottom of the screen.</p>	 <p>Run Report</p> <p>Status</p> <p>SUBMITTED (New)</p>								
<p>8</p>	<p>Reports can be accessed in two ways.</p> <p>Viewing Reports- Option 1:</p> <p>If you have not moved off the report screen, the report will be visible on the same Report screen.</p> <p>The system will send an email once the report is generated.</p>	 <table border="1"> <thead> <tr> <th>Date Run</th> <th>Completed Date</th> <th>Status</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>07/08/2013 01:54:40 PM</td> <td>07/08/2013 01:55:24 PM</td> <td>COMPLETED (New)</td> <td></td> </tr> </tbody> </table>	Date Run	Completed Date	Status	Action	07/08/2013 01:54:40 PM	07/08/2013 01:55:24 PM	COMPLETED (New)	
Date Run	Completed Date	Status	Action							
07/08/2013 01:54:40 PM	07/08/2013 01:55:24 PM	COMPLETED (New)								

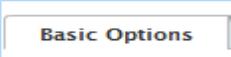
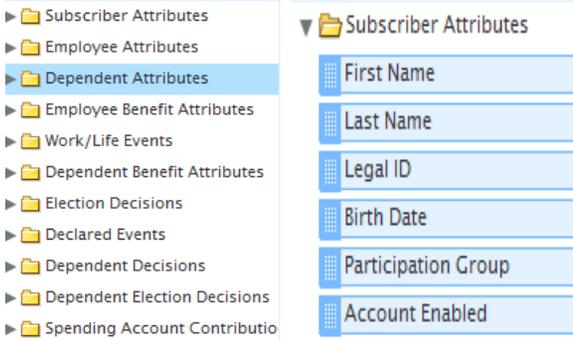
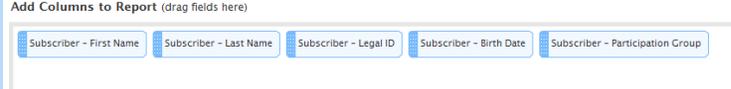
<p>9</p>	<p>Viewing Reports- Option 1: How to access the Report:</p> <p>The report can be exported into excel or it can be viewable on the web or if need be can be deleted.</p>	
<p>10</p>	<p>Viewing Reports Option 2 Report Management: Pending Security Access, Report Management can be utilized.</p> <p>If you have moved off the reporting screen you were using – Select Report Management and go to Completed reports. The newly requested report will list there.</p>	
<p>11</p>	<p>Viewing Reports Option 2 Report Management: Pending Security Access, Report Management can be utilized.</p> <p>Completed Reports: If this tab is selected it will display all completed reports requested. Search by Name and Date Run obtain desired reports.</p>	

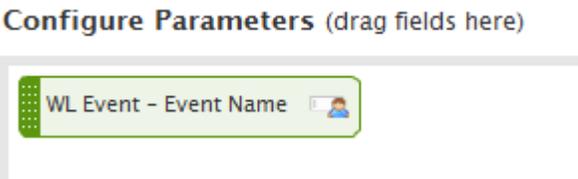
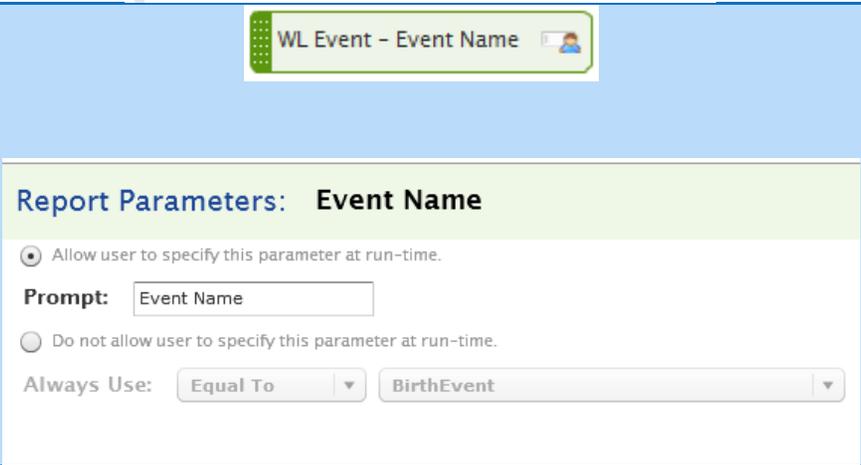
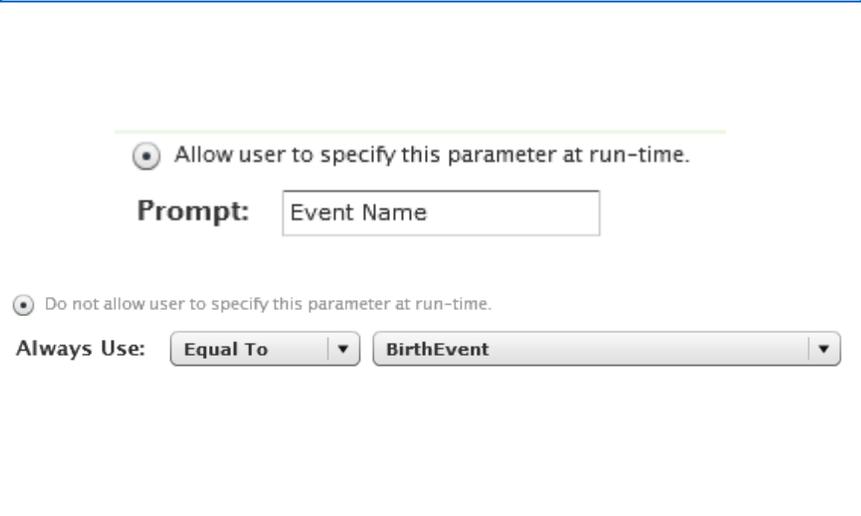
<p>12</p> <p>Viewing Reports Option 2: Pending Security Access, Report Management can be utilized.</p> <p>Public Reports:</p> <p>Public reports are reports that are previously established and can be requested by the Admin to be run automatically.</p> <p>If the Public Report tab is selected it will list all the reports that are published and can be leveraged as needed by agencies.</p> <p>If a specific report needs to be ‘run’, the ADMIN would select the report and select the appropriate icon to Run this report now.</p> <p>*Do not select Delete Report.*</p>		

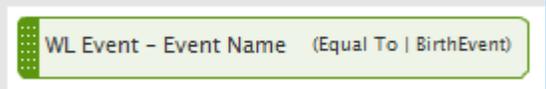
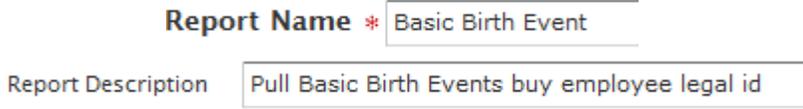
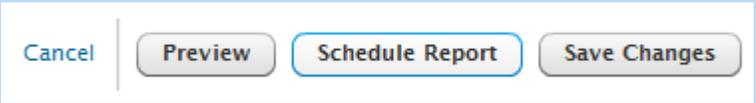
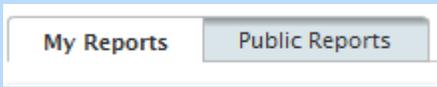
CREATE REPORT

The “Create Report” function allows Admins to generate a custom report to meet SHBP needs.

Note: Admins will only have access to the population based on their security permissions.

Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the “Member Experience” User Guide for the process.
2	Click + next to the Reports button to expand.	 Reports
3	Choose Create Report .	
4	On the Basic Options tab, there will be folders that will allow Admins to determine the parameters.	
5	The folders on the left hand side will expand and the detailed parameters to use will display.	
6	<p>Once the folders are expanded and the detailed parameters are viewable, click on the parameter and drag it in to the box labeled Add Columns to Report.</p> <p>Note: If the parameter used in the Add Columns to Report box is not</p>	

	<p>needed click on it and drag it back to the left column.</p>	
<p>7</p>	<p>Configure Parameters will be used when specific requirements are needed.</p> <p><i>This box is below the Add Columns to Report.</i></p>	
<p>8</p>	<p>To configure parameter double click on the green box.</p> <p>A separate box will open to define the parameters.</p>	
<p>9</p>	<p>Report Parameters:</p> <p>Prompt: Will require that anytime the report is generated it will require this field to be populated.</p> <p>Always Use: Will define the specific parameter to be used and will always be used when running this report.</p> <ul style="list-style-type: none"> • Equal To: Exact Match • Not Equal To: Does Not Match • Begins with: Search will have word match, but at the beginning • Contains: Has a word match, but not exact • Ends with: Word is at the end of the request • In List: List formation, numerical values 	

	<ul style="list-style-type: none"> • Not In List: Not in a list formation 	
<p>10</p>	<p>Configure Parameters will show the parameters that are set; this is viewable in the green box.</p>	
<p>11</p>	<p>Report Name is a required field and must be filled out.</p> <p>Add report description as needed.</p>	
<p>12</p>	<p>Once the parameters have been selected and the report is named, the report can be previewed, scheduled, save changes or canceled.</p> <ol style="list-style-type: none"> Preview- Report is configured to prompt for run-time parameters. Scheduled Report- Saves the parameters and puts the report on a schedule to run. Save Changes- Saves the report into the Reports Management. Cancel- This will return to the Home page. 	
<p>13</p>	<p>To obtain the report that was just created:</p> <p>Go back to the Reports page and go to Report Management the report that was just created will be saved in this location.</p>	
<p>14</p>	<p>My Reports tab has custom reports viewable only by the Admin that created the report.</p> <p>Public Reports tab has custom reports viewable to all Admins.</p>	
<p>15</p>	<p>Icons on the right side will allow the ADMIN to manage the reports</p>	

	<p>quickly.</p> <p>Definitions of each icon are listed by the icon.</p>		<ul style="list-style-type: none"> Run this report now Edit recurrence schedule Edit report settings Copy this report Publish to everyone Delete Report
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CREATE REPORT > ATTRIBUTE FOLDERS

In order to **Create a Report** successfully, the Admin will need to determine where to locate the details (attributes) that will assist with obtaining results. Specific attributes are in different Attributes folders. This section outlines where to locate specific parameters.

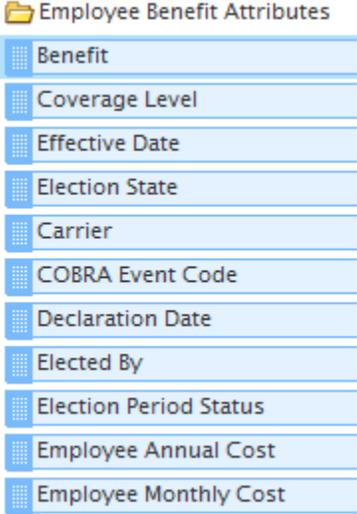
Steps	Process Flow Instructions	Screenshot
<p>1</p>	<p><u>Subscriber Attributes:</u></p> <ul style="list-style-type: none"> • First Name • Last Name • Legal ID • Birth Date • Participation Group • Account Enabled • Address 1 • Address 2 • Address 3 • Address 4 • Address 5 • Benefits Eligible (<i>Use when looking for grandfathered groups.</i>) • City • COB Carrier • COB Coverage Holder • COB Group Number • COB Plan ID • COB Plan Sponsor • County • Deceased Date • E-mail Address • E-mail Preference • Fax # • Gender • HICN 	<div data-bbox="1402 472 1791 1096" style="border: 1px solid #ccc; padding: 5px;"> <p>Subscriber Attributes</p> <ul style="list-style-type: none"> First Name Last Name Legal ID Birth Date Participation Group Account Enabled Address 1 Address 2 Address 3 Address 4 Address 5 benefitsEligible City </div> <p style="text-align: center; margin-top: 20px;">Note: The above is not a full screen shot.</p>

	<ul style="list-style-type: none"> • Is Benefits Eligible? • Is Disabled? • Is Expatriate • Is Smoker • Is Veteran • Leave Reason • Marital Status • Medicare Eligible Reason • Medicare ESRD Date • Medicare Part A Effective Date • Medicare Part B Effective Date • Medicare Part D Effective Date • Medicare Signature • Middle Name • Mobile # • Opt Out of Paper Communications • Other Email Address • Other Coverage • Pager # • PDP Date • Person ID • Phone # • Primary Language • RDS Reason Code • SHBP Eligible <i>(Use when looking for any employee who is currently eligible.)</i> • Stat • Subscriber Type • System of Record • User Name • Wellness • Work State • Zip 	
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<p>2</p>	<p><u>Employee Attributes:</u></p> <ul style="list-style-type: none"> • First Name • Last Name • Legal ID • Hire Date • Birth Date • Company • Compensation Amount • Compensation Frequency Code • Compensation Pay Cycle Frequency Code • Compensation Pay Periods Per Year • Compensation Type • Cost Center • Currency Code • Deceased Date • Department • Division • Employee Group • Employee Group Type • Employee Status Type • Employment Level • Fair Labor Standards Act • Gender • Is Call Center Member • Is Executive • Is New Hire • Job Title • Last Date Paid • Last Date Worked (Leave) • Last Date Worked (Termination) • Leave Date • Leave Reason • Leave Type 	 <p>Note: The above is not a full screen shot.</p>
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	<ul style="list-style-type: none">• Location• Marital Status• Middle Name• Minority Code• Original Hire Date• Person ID• Premium Type• Retirement Date• Return to Work Date• Salary Type• Scheduled Return to Work Date• Shift Type• Termination Date• Termination Reason• Type of Hire• Union• Voluntary• Weekly Hours• Years of Service	
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<p>3</p>	<p><u>Dependent Attributes:</u></p> <ul style="list-style-type: none"> • First Name • Last Name • Legal ID • Birth Date • Gender • Address 1 • Address 2 • Address 3 • Address 4 • Address 5 • City • Deceased Date • Dependent ID • Dependent Type • E-Mail Address • Fax # • HICN • Is Disabled • Is Student • Is Veteran • Marital Status • Medicare Eligible Reason • Medicare ESRD Date • Medicare Part A Effective Date • Medicare Part B Effective Date • Medicare Part D Effective Date • Medicare Signature Date • Middle Name • Mobile # • Pager # • PDP Date • Peach Care • Phone # 	 <p style="text-align: center;">Note: The above is not a full screen shot.</p>
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	<ul style="list-style-type: none"> • QMSCO Benefits • QMSCO State Agency Address Line 1 • QMSCO State Agency Address Line 2 • QMSCO State Agency City • QMSCO State Agency Name • QMSCO State Agency Representative Name • QMSCO State Agency Representative Phone Number • QMSCO State Agency State • QMSCO State Agency Zip • RDS Reason Code • Spouse Wellness • State • Temp Disabled Expire • Temp Guardianship Exp • Verified • Zip 	
<p>4</p>	<p><u>Employee Benefit Attributes:</u></p> <ul style="list-style-type: none"> • Benefit • Coverage Level • Effective Date • Election State • Carrier • COBRA Event Code • Declaration Date • Elected By • Election Period Status • Employee Annual Cost • Employee Monthly Cost • Employee Pay Period Cost • Employer Annual Cost • Employer Monthly Cost • Employer Pay Period Cost • Event Descriptions 	 <p>Note: The above is not a full screen shot.</p>

	<ul style="list-style-type: none">• Event Name• Event State• Event Type• Evidence Required Type• First Election Date• Is COBRA Qualifying Event• Is Eligibility Override• Is Eligible• Is Employer Provided• Is Evidence Required• Is in Effect• Last Election Date• Occurred Date• Option• Override Reason	
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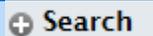
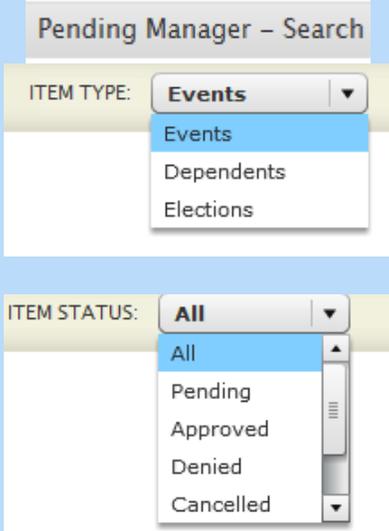
PENDING MANAGER

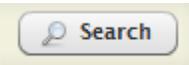
HR Admin users can use Pending Manager search to do the following:

- Search based on status: Pending, Approved, Denied, Cancelled (or all for the selected pending type)
- Search based on specific member
- View details of the actions in Pending status
- Approve, deny, extend, or make notes about the pending action

HR Admins are able to search for any pending activity based on selection parameters and then act on the pending activity.

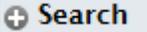
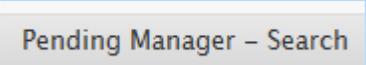
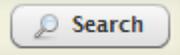
SEARCHING FOR PENDING ACTIVITY VIA STATUS

Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the “Member Experience” User Guide for the process.
2	Click Search .	
3	Select Pending Manager in the drop down box.	
4	<p>An HR Admin user can use Pending Manager to search for pending activity based on the following:</p> <ul style="list-style-type: none"> • Item Type of Event, Dependents, or Elections. • Item Status of All, Pending, Approved, Denied, Cancelled, Expired, or Ineligible. <p>As with Member Search, Pending Manager provides both basic and advanced search capabilities including search by subscriber name, SSN, and Person ID, as well as by event name.</p> <p>Note: Elections (as an Item Type) does not apply to SHBP. Events and Dependents do.</p>	

5	After choosing the Item Status , select Search .																									
6	This is an example of Pending Status .	<div data-bbox="926 272 2053 396"> <p>ITEM TYPE: Dependents ITEM STATUS: Pending</p> <table border="1"> <thead> <tr> <th>Subscriber's Name</th> <th>Subscriber's Id</th> <th>Event</th> <th>Dependent's Name</th> <th>Is a Pending Event</th> <th>Pending Elections</th> <th>Expire Date</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>SUBSCRIBER, SALLY</td> <td>908</td> <td>Birth</td> <td>ryder, wiona</td> <td>No</td> <td>1</td> <td>08/20/2013</td> <td>Pending</td> </tr> <tr> <td>SUBSCRIBER, SALLY</td> <td>610</td> <td>Birth</td> <td>subscriber, lulu</td> <td>No</td> <td>1</td> <td>08/20/2013</td> <td>Pending</td> </tr> </tbody> </table> </div>	Subscriber's Name	Subscriber's Id	Event	Dependent's Name	Is a Pending Event	Pending Elections	Expire Date	Status	SUBSCRIBER, SALLY	908	Birth	ryder, wiona	No	1	08/20/2013	Pending	SUBSCRIBER, SALLY	610	Birth	subscriber, lulu	No	1	08/20/2013	Pending
Subscriber's Name	Subscriber's Id	Event	Dependent's Name	Is a Pending Event	Pending Elections	Expire Date	Status																			
SUBSCRIBER, SALLY	908	Birth	ryder, wiona	No	1	08/20/2013	Pending																			
SUBSCRIBER, SALLY	610	Birth	subscriber, lulu	No	1	08/20/2013	Pending																			
7	This is an example of Denied Status .	<div data-bbox="926 402 2053 561"> <p>Pending Manager – Search</p> <p>ITEM TYPE: Dependents ITEM STATUS: Denied</p> <table border="1"> <thead> <tr> <th>Subscriber's Name</th> <th>Subscriber's Id</th> <th>Event</th> <th>Dependent's Name</th> <th>Is a Pending Event</th> <th>Pending Elections</th> <th>Expire Date</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>COTTINGHAM, SALLY C</td> <td>23119</td> <td>Birth</td> <td>child, tester</td> <td>No</td> <td>0</td> <td>09/01/2013</td> <td>Denied</td> </tr> </tbody> </table> </div>	Subscriber's Name	Subscriber's Id	Event	Dependent's Name	Is a Pending Event	Pending Elections	Expire Date	Status	COTTINGHAM, SALLY C	23119	Birth	child, tester	No	0	09/01/2013	Denied								
Subscriber's Name	Subscriber's Id	Event	Dependent's Name	Is a Pending Event	Pending Elections	Expire Date	Status																			
COTTINGHAM, SALLY C	23119	Birth	child, tester	No	0	09/01/2013	Denied																			

PENDING MANAGER

SEARCHING FOR PENDING ACTIVITY VIA A SPECIFIC MEMBER

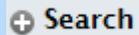
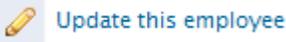
Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the “Member Experience” User Guide for the process.
2	Click Search .	
3	Select Pending Manager in the drop down box.	
4	At the Pending Manger- Search screen, choose the plus button.	 
5	This opens a screen for you to enter specific search criteria.	
6	After entering the data elements, (i.e. member first and last name), click Search .	
7	Search result display on next screen. Screen shot only shares one member’s result. Pending search criteria, multiple members will display on the same screen.	

EMPLOYEE INDICATIVE DATA CHANGES: ACTIVE AND RETIRED EMPLOYEES > FOR AGENCIES USING DATA SHARING TOOL

(i.e. Address, spelling of member name, gender --- For Agencies with access to Data Sharing Tool*

This allows **user with appropriate security level access** to update indicative data (i.e. spelling of name, birth date, address etc) for an active or retired member. There may be Admins who can READ the Data Sharing Tool, but will not have WRITE or access to update member data.

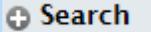
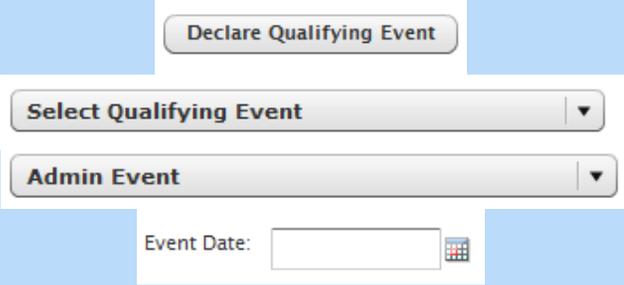
Note: Retirees are able to update their address on their OWN after logging onto the ADP System.

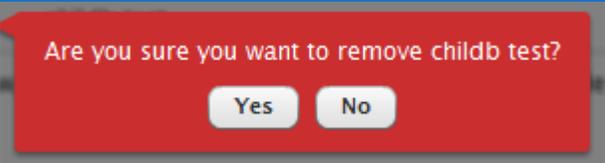
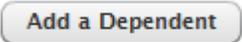
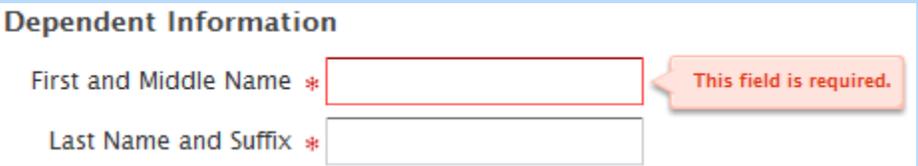
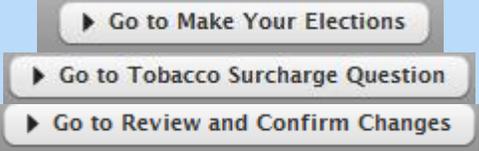
Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the “Member Experience” User Guide for the process.
2	Click Search .	
3	Choose Member Search from the drop down box.	
4	Enter the appropriate member details.	
5	Choose Update this employee .	
6	On the Update Subscriber screen, choose Personal .	
7	Enter the effective date into system using the calendar feature icon. Note: The date cannot be prior to 1/1/13.	
8	Click Submit to have changes sent to the SHBP Enrollment Portal. Critical: If there is more than ONE change to indicative data, each item has to be	

	<p>submitted separately. i.e. Name change and Address change would have to be submitted separately.</p> <p>Note: Review all changes prior to submission in order to ensure the accuracy of data entry.</p>	
	<p>Critical for SSN Corrections: Please see the Data Sharing Tool >SSN Changes</p> <p>If an employee has an incorrect SSN in the system and is entered via the Data Sharing Tool with the correct SSN, the person will then be in the SHBP Enrollment Portal Twice. Please contact the SHBP Staff with the employee details and the SHBP Staff will work with ADP to update the account.</p>	
	<p>ADP email communication: No ADP email communication.</p>	
	<p>ADP file frequency: Update on SHBP Enrollment Portal is immediate.</p>	

DEPENDENT INDICATIVE DATA CHANGE

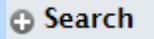
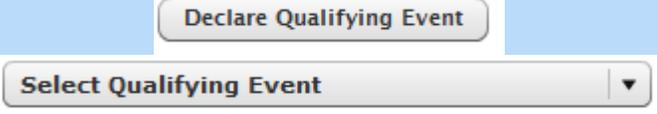
This allows **user with appropriate security level access** to update indicative data (i.e. spelling of name, birth date, SSN changes) on a dependent.

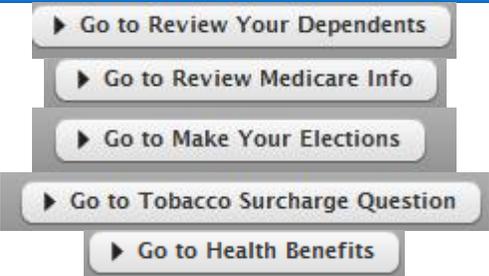
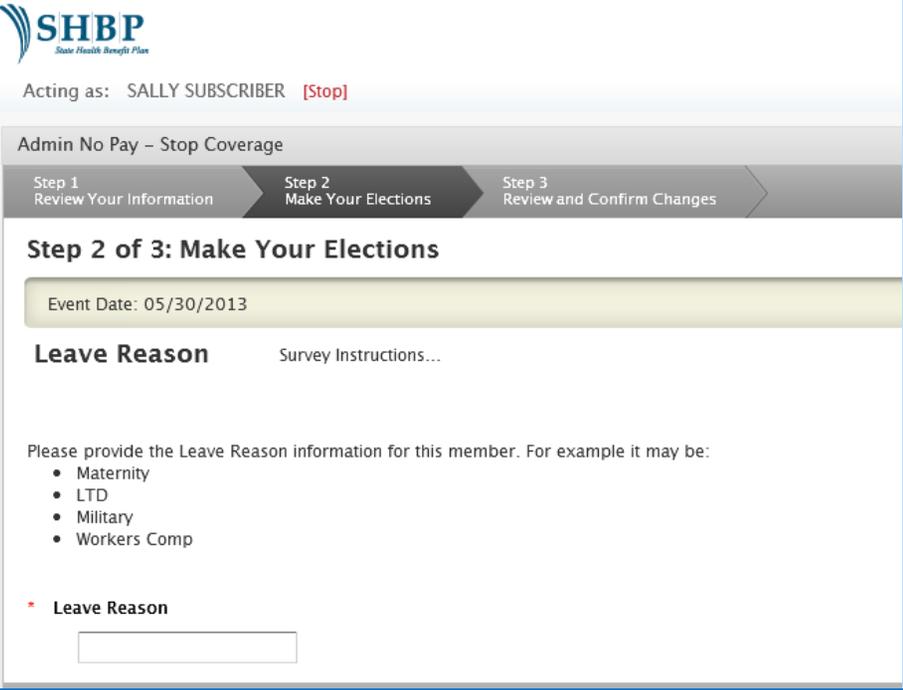
Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the “Member Experience” User Guide for the process.
2	Click Search .	
3	Choose Member Search from the drop down box.	
4	Enter the appropriate member details.	
5	Choose Act as this employee .	
6	<p>Declare Qualifying Event as an SHBP IT ONLY/Admin Event and enter in the appropriate Event Date.</p> <p>Note: If SHBP IT ONLY/ Admin Event is used to make corrections, the dependent will not pend.</p>	
7	On the Welcome page, click Accept Terms and Conditions .	
8	On the Review Your Information page, click Review Your Dependents .	
9	Select the red circle next to the dependent that requires the indicative data update.	

	This will remove the dependent from the record.	
10	Click Yes to confirm the dependent should be removed.	
11	Next, add the dependent back into the system with the appropriate details by clicking Add a Dependent .	
12	The Add Dependent Information screen displays with required fields noted. Verify data entry as complete.	
13	Click Submit at the bottom of the screen.	
14	Move through the following screens and confirm changes. Note: Do not make enrollment changes to medical unless needed.	
15	Complete the enrollment by clicking Finish .	
	ADP email communication: No ADP email communication.	

ADMIN NO PAY –STOP COVERAGE

This allows a user with appropriate security level access to discontinue coverage elections due to non-payment for direct bill. A survey is included so that a user must declare a **Leave Reason** to identify the purpose/intent of why the event was declared.

Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the “Member Experience” User Guide for the process.
2	Click Search .	
3	Choose Member Search from the drop down box.	
4	Enter the appropriate member details.	
5	Choose Act as this employee .	
6	Click Declare a Qualifying Life Event , and Select Qualifying Event .	
7	Choose Admin No Pay - Stop Coverage , and enter the Event Date . Note: The Event Date should be the first day after coverage ends.	
8	Click Submit .	

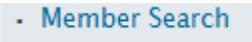
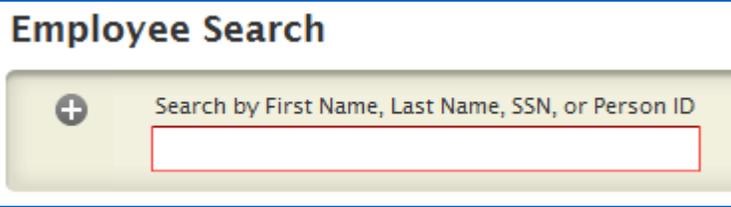
<p>9</p>	<p>Review the Current Enrollment screen, and move through the following screens reviewing details on each.</p>	
<p>10</p>	<p>Make necessary enrollment change for health benefits. (i.e., tier level change, drop coverage etc.)</p>	
<p>11</p>	<p>Click Go to Leave Reason.</p>	
<p>12</p>	<p>Answer the survey questions following SHBP guidelines.</p>	
<p>13</p>	<p>After the Leave Reason is entered, click Go to Review and Confirm Changes.</p>	

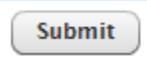
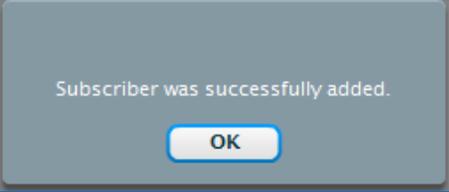
14	Complete the enrollment by clicking Finish .	
	ADP email communication: No email communication sent. File Timing: Daily changes sent to SHBP.	

DATA SHARING TOOL > DATA SHARING TOOL > ADD SUBSCRIBER/NEW HIRE DATA ENTRY

This allows a user with appropriate security level access to enter a new hire directly into the ADP system as opposed to updating the data through an input file. The only type of member that should be entered is an ACTIVE member (no contractors, not retirees).

Note: Only Agencies that do NOT send Automated Files will have access and should use the Data Sharing Tool.

Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the “Member Experience” User Guide for the process.
2	Click Search .	
3	Choose Member Search from the drop down box.	
4	Enter the appropriate member details.	
5	Search for the member to ensure their employment data is not already in the SHBP Enrollment Portal Site.	
6	If member is not within the system, click Add Subscriber .	
7	<p>The Add Subscriber page displays. Enter any field that has an asterisk next to it. <u>These are required fields</u>. If not entered, the record creation of the member record will fail.</p> <p>Note:</p> <ul style="list-style-type: none"> Depending on the field type, select text from a drop down list or select from the data picker. Benefit eligibility rules are enforced by 	<p>Example:</p> 

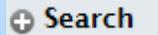
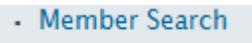
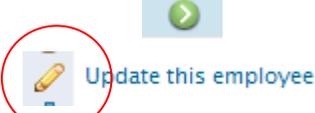
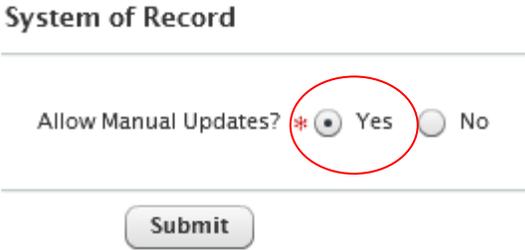
	<p>the ADP system. To minimize any member impact for enrollment opportunity, ensure accuracy of data entry.</p> <ul style="list-style-type: none"> • If at all possible, enter an email address for the member. This will ensure the new member notified with a “New Enrollment” notification email. 	
8	After all required fields are entered, click Submit .	
9	Confirmation of the newly added member appears.	
10	<p>Note: An Admin may do a search and not see an existing record on file due to visibility restrictions. If you try to add a member that already exists, an error message will occur.</p> <p>This means the member is in the SHBP Enrollment Portal already; however you do not have access to the member’s playgroup.</p> <p>NEXT STEP: Contact SHBP DCH team to coordinate access and the transfer.</p>	
11	System Timing: After confirmation that the member was added, the member can log in online, register and make their enrollments.	
	ADP email communication: New Hire Window	

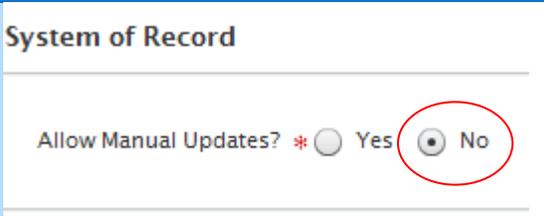
	email will be sent if email address is on file.	
	ADP file frequency: Files sent daily to SHBP.	

DATA SHARING TOOL > DATA SHARING TOOL > SYSTEM OF RECORD

This allows an Admin the ability to update a member record via the Data Sharing Tool.

Note: Only Agencies that do NOT send Automated Files will have access and should use the Data Sharing Tool.

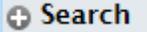
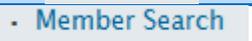
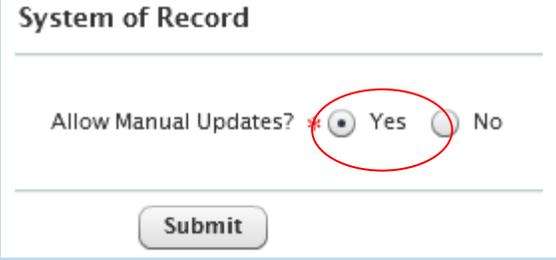
Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the “Member Experience” User Guide for the process.
2	Click Search .	
3	Choose Member Search from the drop down box.	
4	Enter the appropriate member details.	
5	Next to Member Name, click the green arrow, and choose the ‘pencil’ to Update this employee .	
6	Click System of Record .	
7	System of Record must be listed as Yes in order for the account to be updated via the Data Sharing Tool. Note: If the Data Sharing Tool is used on an escalated situation, and the member is normally sent on a file, the regular system that is used to update SHBP must be updated as well to ensure data is not overwritten.	

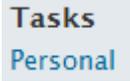
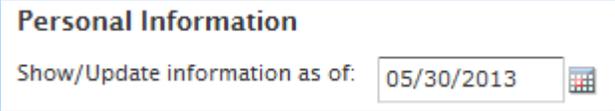
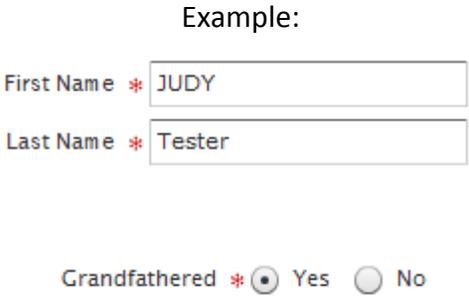
<p>8</p>	<p>After making changes in the Data Sharing Tool, go back to System of Record, and click No to ensure record is locked.</p> <p>This will set the System of Record back to 'No'.</p>	 <p>The screenshot shows a section titled "System of Record". Below the title is a horizontal line. Underneath, the text "Allow Manual Updates?" is followed by a red asterisk, a radio button for "Yes", and a radio button for "No". The "No" radio button is selected and circled in red.</p>
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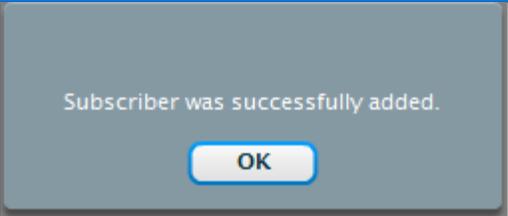
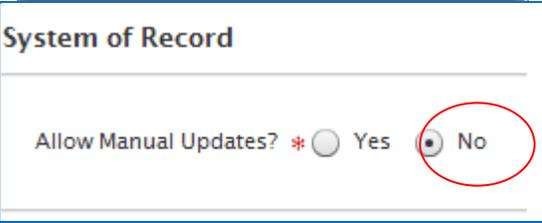
DATA SHARING TOOL > PERSONAL

This allows a user with an appropriate security level access to update certain indicative data for members: (i.e., first and last name, gender etc)

Note: Only Agencies that do NOT send Automated Files will have access and should use the Data Sharing Tool.

Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the “Member Experience” User Guide for the process.
2	Click Search .	
3	Choose Member Search from the drop down box.	
4	Enter the appropriate member details.	
5	Next to Member Name, click the green arrow, and choose the ‘pencil’ to Update this employee .	
6	<p>System of Record must be listed as Yes in order for the account to be updated via the Data Sharing Tool.</p> <p>Critical: If there is more than ONE change to indicative data, each item has to be submitted separately. I.e. Name change and Address change would have to be submitted separately.</p> <p>Note: If the Data Sharing Tool is used on an escalated</p>	

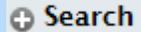
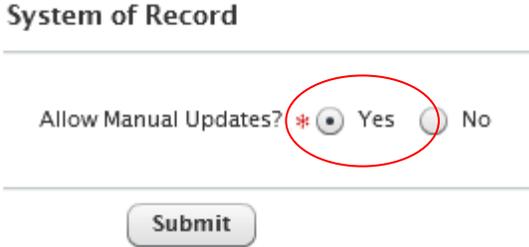
	<p>situation, and the member is normally sent on a file, the regular system that is used to update SHBP must be updated as well to ensure data is not overwritten.</p>	
<p>7</p>	<p>The Update Subscriber page displays.</p> <p>Under Tasks, choose Personal.</p>	
<p>8</p>	<p>Enter the effective date of the change.</p> <p>Note: Typically, this is the date of hire or date of marriage, for example.</p>	
<p>9</p>	<p>Update the desired personal indicative data changes.</p> <p>Grandfather Question must be answered. The definition of Grandfather means that a member is ‘automatically’ benefits eligible, and does not look at DOH or location to determine eligibility.</p> <p>Note:</p> <ul style="list-style-type: none"> Depending on the field type, select text from a drop down list or select from the data picker. Benefit eligibility rules are enforced by the ADP system. To minimize any member impact for enrollment opportunity, ensure the accuracy of data entry. 	
<p>10</p>	<p>After all required fields are entered click Submit.</p>	

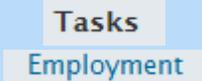
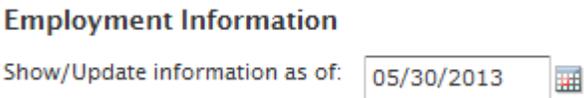
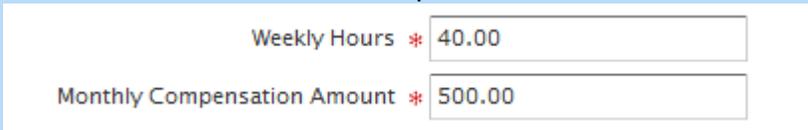
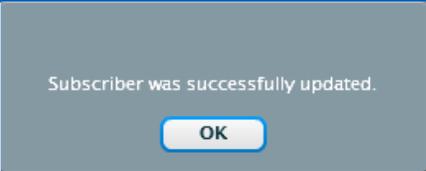
<p>11</p>	<p>Confirmation of changes added displays.</p>	
<p>12</p>	<p>After making changes in the Data Sharing Tool, go back to System of Record, and click No to ensure record is locked.</p> <p>This will set the System of Record back to 'No'.</p>	
	<p>System Timing: After confirmation that the change was added, the member can log in online and view the changes.</p>	
	<p>ADP email communication: No ADP email communication.</p>	
	<p>ADP file frequency: Files sent daily to SHBP.</p>	

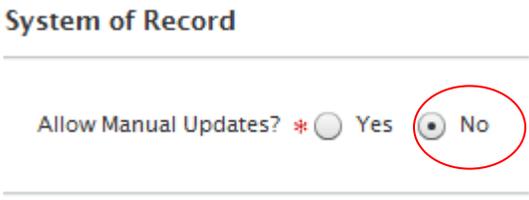
DATA SHARING TOOL > EMPLOYMENT

This allows a user with appropriate security level access to update specific employment data for members: (i.e., employment status, scheduled hours, hire date, compensation and Payroll Location).

Note: Only Agencies that do NOT send Automated Files will have access and should use the Data Sharing Tool.

Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the “Member Experience” User Guide for the process.
2	Click Search .	
3	Choose Member Search from the drop down box.	
4	Enter the appropriate member details.	
5	Next to Member Name , click the green arrow, and choose the ‘pencil’ to Update this employee .	
6	Click System of Record .	
7	<p>System of Record must be listed as Yes in order for the account to be updated via the Data Sharing Tool.</p> <p>Note: If the Data Sharing Tool is used on an escalated situation, and the member is normally sent on a file, the regular system that is used to update SHBP must be updated as well to ensure data is not overwritten.</p>	

<p>8</p>	<p>The Update Subscriber page displays.</p> <p>Under Tasks, choose Employment.</p>	
<p>9</p>	<p>Enter the effective date of the change.</p> <p>Note: Typically this is the date of hire or date of marriage, for example.</p>	
<p>10</p>	<p>Update the desired employment data changes. i.e.</p> <ul style="list-style-type: none"> • Monthly compensation • Weekly Hours • Premium Type for Retirees <p>Note:</p> <ul style="list-style-type: none"> • Depending on the field type, select text from a drop down list or select from the data picker. • Hire Date and Original Hire Date functionality may be revised; these items will only be visible. 	
<p>11</p>	<p>After all required fields are entered, click Submit.</p>	
<p>12</p>	<p>Confirmation of changes added displays.</p>	

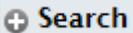
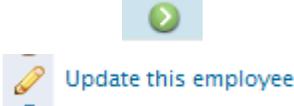
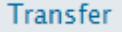
<p>13</p>	<p>After making changes in the Data Sharing Tool, go back to System of Record, and click No to ensure record is locked.</p> <p>This will set the System of Record back to 'No'.</p>	 <p>The screenshot shows a section titled "System of Record" with a horizontal line above and below it. Below the line, the text "Allow Manual Updates? *" is followed by two radio buttons. The "Yes" radio button is unselected, and the "No" radio button is selected and circled in red.</p>
	<p>System Timing: After confirmation that the change was added, the member can log in online and view the changes.</p>	
	<p>ADP email communication: No ADP email communication.</p>	
	<p>ADP file frequency: Files sent daily to SHBP.</p>	

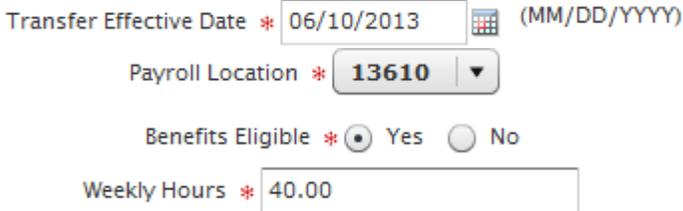
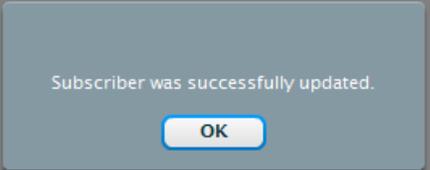
DATA SHARING TOOL > TRANSFER

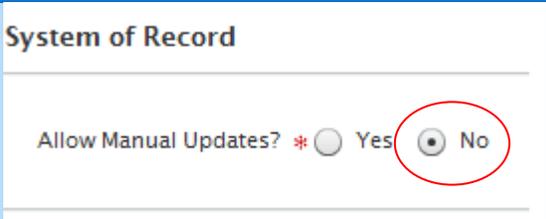
This event will be utilized by SHBP Admins with the appropriate access to update a member’s record if they are part of a transfer to a new agency/Payroll Location.

Note:

- Agency Admins will only be able to process transfers on members they have security access to see.
- If the member’s hire date is greater than the previous hire date, and the agency sends a file, the Data Sharing Tool should not be used.

Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the “Member Experience” User Guide for the process.
2	Click Search .	
3	Choose Member Search from the drop down box.	
4	Enter the appropriate member details.	
5	Next to Member Name, click the green arrow, and choose the ‘pencil’ to update this employee.	
6	Click System of Record .	
7	System of Record must be listed as Yes in order for the account to be updated via the Data Sharing Tool.	
8	Click Transfer .	

<p>9</p>	<p>The following fields must be updated:</p> <ul style="list-style-type: none"> • Effective Date (as date of the transfer) • Payroll Location (verify accuracy) • Benefits Eligible • Weekly Hours <p>Note: The transfer effective date is the date the member joined the new Payroll Location/ Agency.</p> <p>The system will accept the transfer date and update the new Payroll Location as long as the date entered is greater than the previous date of hire that is in the system for the employee (under their old Payroll Location).</p> <p>The prior agency will no longer have access to the employee after the transfer is complete. The old location will be termed the day before the new effective date of the new location.</p>	
<p>10</p>	<p>Once complete, click Submit.</p>	
<p>11</p>	<p>Confirmation of the save displays.</p>	

<p>12</p>	<p>After making changes in the Data Sharing Tool, go back to System of Record, and click No to ensure record is locked.</p> <p>This will set the System of Record back to 'No'.</p>	 <p>The screenshot shows a section titled "System of Record". Below the title, there is a question: "Allow Manual Updates? *". There are two radio buttons: "Yes" and "No". The "No" radio button is selected and is circled in red.</p>
	<p>System Timing: After confirmation that the change was added, the system will recalculate benefits and rates. The member can log in online, and view the changes immediately.</p>	
	<p>ADP email communication: No ADP email communication.</p>	
	<p>ADP file frequency: Files sent daily to SHBP; any changes for payroll location and cost will be on the daily file.</p>	

DATA SHARING TOOL > EXPLICIT TRANSFER LOCK

The explicit transfer function will only be used by the SHBP Staff when this location needs to be manually changed, such as in the case of dual employment, or when one agency doesn't send a timely termination, and the member is hired by another agency.

This function will be used only when SHBP needs to explicitly change the Payroll Location of a member. Most changes will be handled by the automated files but there will be instances where this function is needed. For security reasons, Agency Admins will only have access to the members who are currently in their Payroll Location.

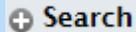
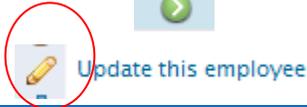
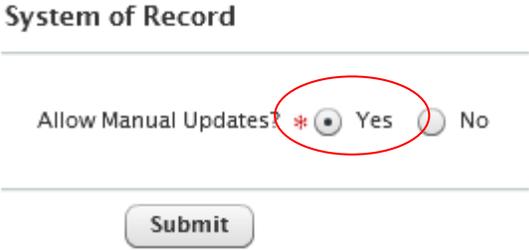
Example:

Test Member is a member at X Agency, and gets a second job at Y Agency. Test Member is currently enrolled in benefits/rates with X Agency. Test Member would like to keep benefits with X Agency and not go on Y Agency benefits. Test Member notifies HR or ADP who will contact the SHBP Staff with the request.

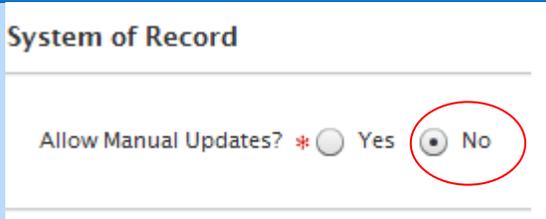
DATA SHARING TOOL > REHIRE

This allows a user with appropriate security level access to update specific Rehire data for Members.

Note: Only Agencies that do NOT send Automated Files will have access and should use the Data Sharing Tool.

Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the “Member Experience” User Guide for the process.
2	Click Search .	
3	Choose Member Search from the drop down box.	
4	Enter the appropriate member details.	
5	Next to Member Name, click the green arrow, and choose the ‘pencil’ to Update this employee .	
6	Click System of Record .	
7	<p>System of Record must be listed as Yes in order for the account to be updated via the Data Sharing Tool.</p> <p>Note: If the Data Sharing Tool is used on an escalated situation, and the member is normally sent on a file, the regular system that is used to update SHBP must be updated</p>	

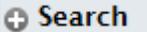
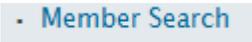
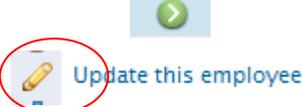
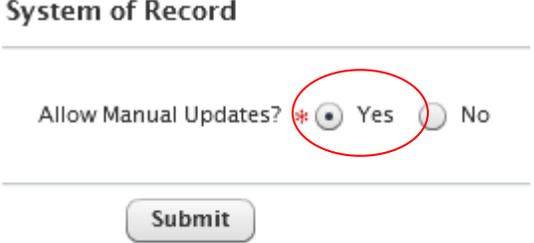
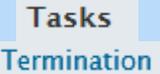
	as well to ensure data is not overwritten.	
8	The Update Subscriber page displays. Under Tasks , choose Rehire .	<div style="text-align: right;"> Tasks Rehire </div>
9	On the Rehire Information screen, enter the rehire date in the Adjusted Hire Date field. Note: All required fills must be updated with the employee’s NEW Rehire Information. Previous Employee details will auto-populate in this screen.	<div style="text-align: center;"> Rehire Information <hr/> <p>Rehire Date * <input type="text"/> (MM/DD/YYYY)</p> <p>Employment</p> <p>Payroll Location * <input type="text" value="79313"/></p> <p>Unit School Code <input type="text"/></p> <p>Weekly Hours * <input type="text"/></p> <p>Benefits Eligible * <input checked="" type="radio"/> Yes <input type="radio"/> No</p> <p>Premium Type <input type="text"/></p> <hr/> Submit </div>
11	After all required fields are entered, click Submit .	Submit
12	Confirmation of the changes added displays.	<div style="background-color: #cccccc; padding: 10px; border: 1px solid #000;"> <p>Subscriber was successfully updated.</p> OK </div>

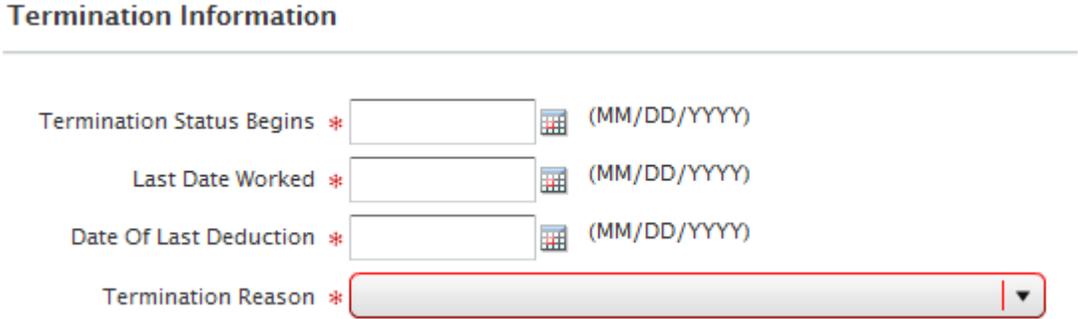
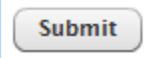
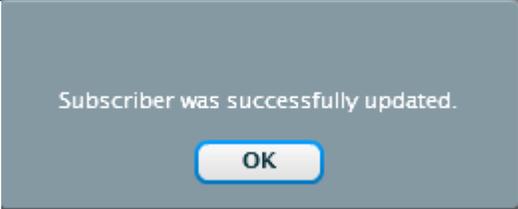
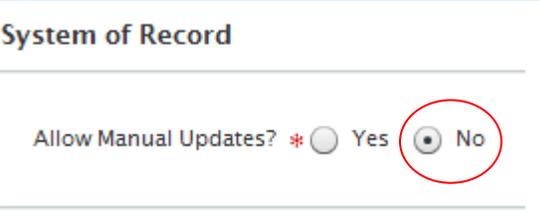
<p>13</p>	<p>After making changes in the Data Sharing Tool, go back to System of Record, and click No to ensure record is locked.</p> <p>This will set the System of Record back to 'No'.</p>	 <p>The screenshot shows a section titled "System of Record" with a horizontal line below it. Below the line, the text "Allow Manual Updates?" is followed by two radio buttons. The "Yes" radio button is unselected, and the "No" radio button is selected and circled in red.</p>
	<p>System Timing: After confirmation that the change was added, the member can log online, and view the changes.</p>	
	<p>ADP email communication: If the member is hired within 31 days and has an email address on file, the New Hire email will be sent.</p>	
	<p>ADP file frequency: Files sent daily to SHBP.</p>	

DATA SHARING TOOL > TERMINATION

This allows a user with an appropriate security level access to update specific termination data for members.

Note: Only Agencies that do NOT send Automated Files will have access and should use the Data Sharing Tool.

Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the “Member Experience” User Guide for the process.
2	Click Search .	
3	Choose Member Search from the drop down box.	
4	Enter the appropriate member details.	
5	Next to Member Name, click the green arrow, and click the ‘pencil’ to update this employee.	
6	Click System of Record .	
7	System of Record must be listed as Yes in order for the account to be updated via the Data Sharing Tool.	
8	The Update Subscriber page displays. Under Tasks , choose Termination .	

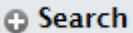
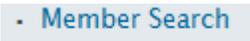
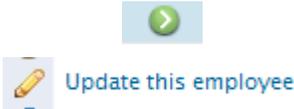
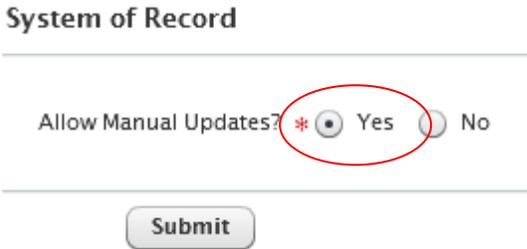
<p>9</p> <p>On the Termination Information screen, enter the Termination date and the coverage end date.</p> <p>Term Status Begins = the first day no longer employed.</p> <p>Last Date Worked = Last day working.</p> <p>Date of Last Deduction = Last paycheck with a deduction.</p> <p>Select the Termination Reason from the drop down box.</p> <p>Note: A voluntary piece will be added and defaulted to YES.</p>		
<p>11</p>	<p>After all required fields are entered, click Submit.</p>	
<p>12</p>	<p>Confirmation of changes added displays.</p>	
<p>13</p>	<p>After making changes in the Data Sharing Tool, go back to System of Record, and click No to ensure record is locked.</p> <p>This will set the System of Record back to 'No'.</p>	

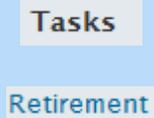
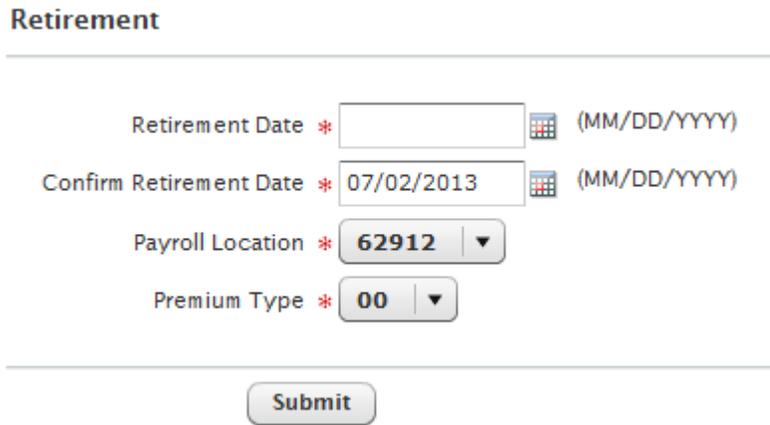
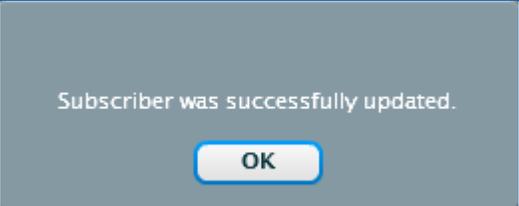
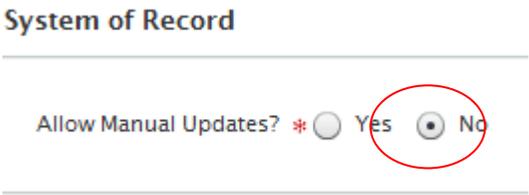
	System Timing: After confirmation that the change was added, the Admin can log online, and view the changes.	
	ADP email communication: No ADP email communication.	
	ADP file frequency: Files sent daily to SHBP.	

DATA SHARING TOOL > RETIREMENT

This allows a user with an appropriate security level access to update retirement data for members.

Note: Only Agencies that do NOT send Automated Files will have access and should use the Data Sharing Tool.

Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click Search .	
3	Choose Member Search from the drop down box.	
4	Enter the appropriate member details.	
5	Next to Member Name, click the green arrow, and click the 'pencil' to Update this employee .	
6	Click System of Record .	
7	<p>System of Record must be listed as Yes in order for the account to be updated via the Data Sharing Tool.</p> <p>Note: If the Data Sharing Tool is used on an escalated situation, and the member is normally sent on a file, the regular system that is used to update SHBP must be updated</p>	

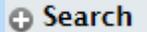
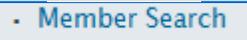
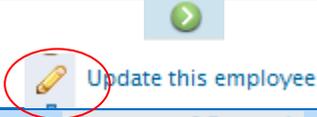
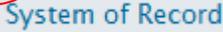
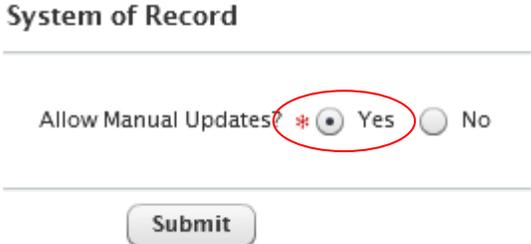
	as well to ensure data is not overwritten.	
8	The Update Subscriber page displays. Under Tasks , choose Retirement .	
9	Update all required fields (notated by the asterisk) on the Retirement page. Update Payroll Location and Premium type to appropriate Retiree data points.	
10	Confirmation of changes added displays.	
11	After making changes in the Data Sharing Tool, go back to System of Record , and click No to ensure record is locked. This will set the System of Record back to 'No' .	
	ADP email communication: New Retiree email is sent if email address is on file.	

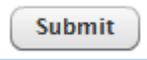
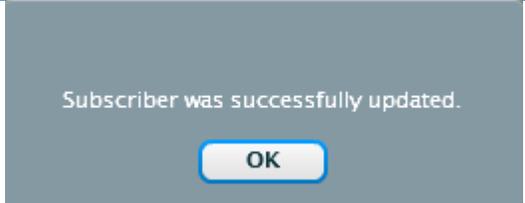
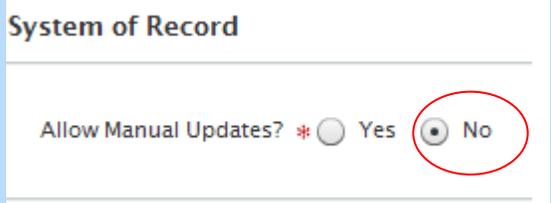
	ADP file frequency: Files sent daily to SHBP.	
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DATA SHARING TOOL > DECEASED

This allows a user with appropriate security level access to update specific death data for members.

Note: Only Agencies that do NOT send Automated Files will have access and should use the Data Sharing Tool.

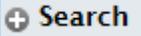
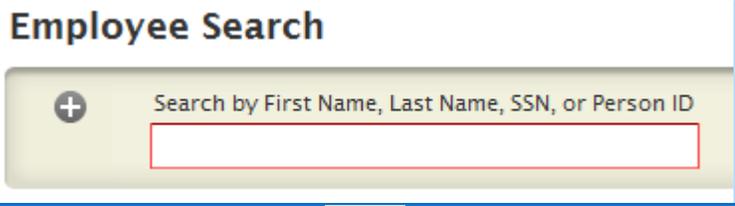
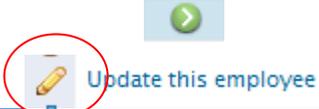
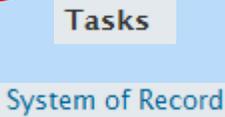
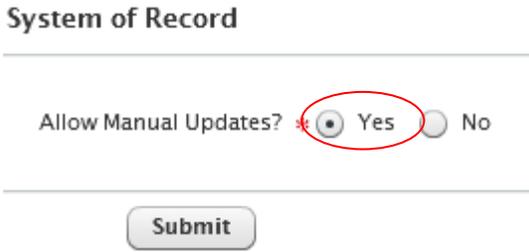
Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the “Member Experience” User Guide for the process.
2	Click Search .	
3	Choose Member Search from the drop down box.	
4	Enter the appropriate member details.	
5	Next to Member Name, click the green arrow, and click the ‘pencil’ to Update this employee .	
6	Click System of Record .	
7	System of Record must be listed as Yes in order for the account to be updated via the Data Sharing Tool.	
8	The Update Subscriber page displays. Under Tasks , choose Deceased .	

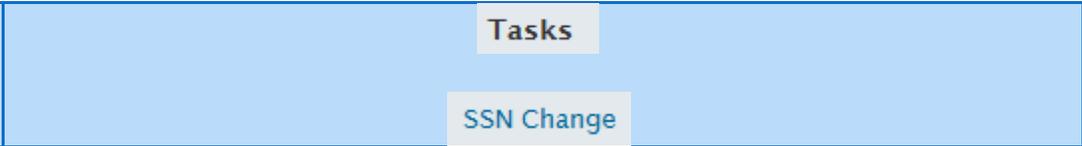
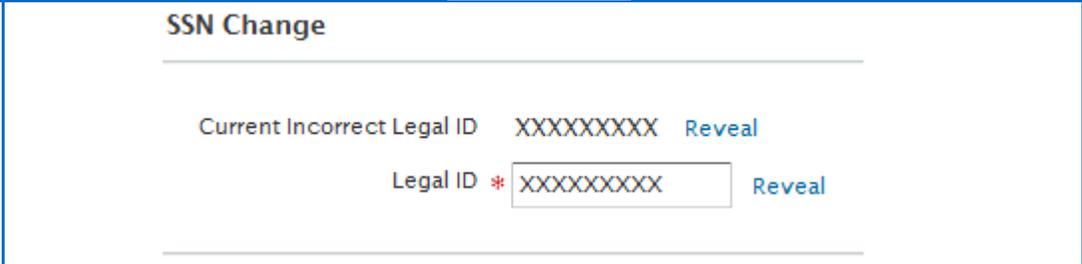
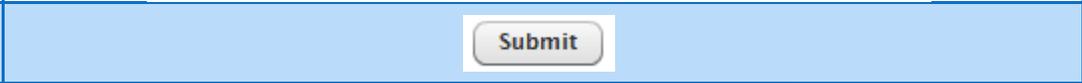
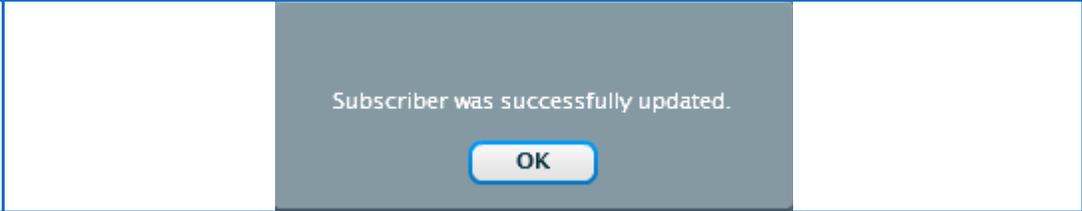
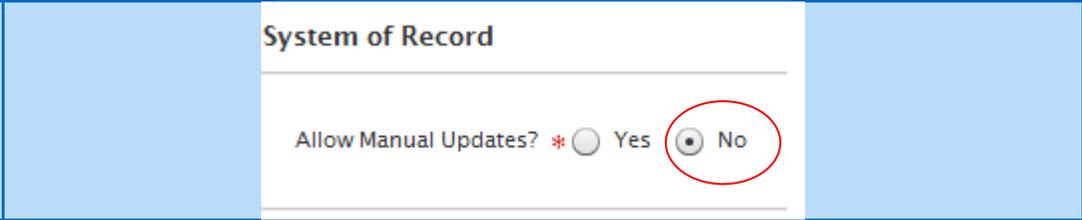
<p>9</p>	<p>Enter the Deceased Date for the subscriber.</p>	 <p>Death of Subscriber</p> <hr/> <p>Deceased Date * <input type="text" value="06/06/2013"/> (MM/DD/YYYY)</p>
<p>11</p>	<p>After all required fields are entered, click Submit.</p>	
<p>12</p>	<p>Confirmation of changes added displays.</p>	
<p>13</p>	<p>After making changes in the Data Sharing Tool, go back to System of Record, and click No to ensure record is locked.</p> <p>This will set the System of Record back to 'No'.</p>	 <p>System of Record</p> <hr/> <p>Allow Manual Updates? * <input type="radio"/> Yes <input checked="" type="radio"/> No</p>
	<p>System Timing: After confirmation that the change was added, the Admin can log in online, and view that the status of the member is now deceased.</p>	
	<p>ADP email communication: No ADP email communication.</p>	
	<p>ADP file frequency: Files sent daily to SHBP.</p>	

DATA SHARING TOOL > SSN CHANGE

This allows a user with an appropriate security level access to update a member’s SSN.

Note: Only Agencies that do NOT send Automated Files will have access and should use the Data Sharing Tool.

Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the “Member Experience” User Guide for the process.
2	Click Search .	
3	Choose Member Search from the drop down box.	
4	Enter the appropriate member details.	
5	Next to Member Name, click the green arrow, and choose the ‘pencil’ to Update this employee .	
6	The Update Subscriber page displays. Under Tasks , Click System of Record .	
7	<p>System of Record must be listed as Yes in order for the account to be updated via the Data Sharing Tool.</p> <p>Note: If the Data Sharing Tool is used on an escalated situation, and the member is normally sent on a file, the regular system that is used to update SHBP must be updated as well to ensure data is not overwritten.</p>	

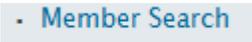
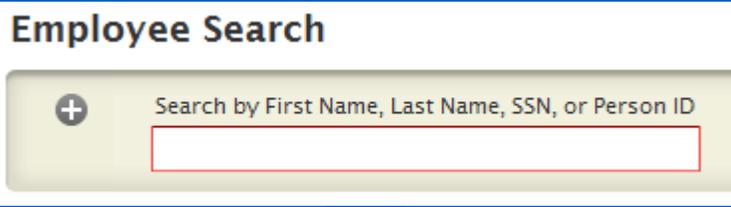
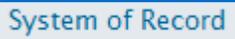
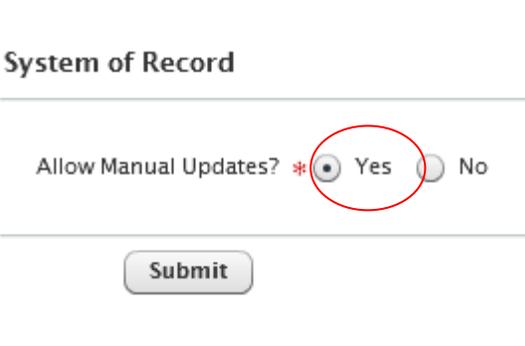
8	Under Tasks , Click SSN Change .	
9	Use the Reveal feature to view and confirm the Incorrect SSN in the system. Then enter in the correct SSN (Legal ID).	
10	Verify new SSN submitted is accurate and then choose Submit .	
11	Confirmation of change added displays.	
12	After making changes in the Data Sharing Tool, go back to System of Record , and click No to ensure record is locked. This will set the System of Record back to 'No'.	
	<p>Critical for SSN Corrections: If an employee has been entered into the Portal with an incorrect SSN in the system and is then entered again with the correct SSN (the above process not followed), the person will then be in the SHBP Enrollment Portal Twice. Please contact the SHBP Staff with the employee details and the SHBP Staff will work with ADP to update the</p>	

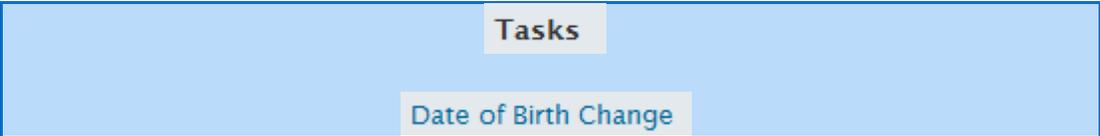
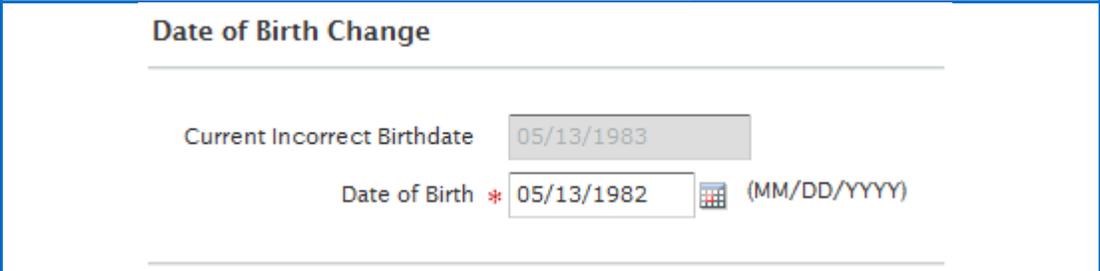
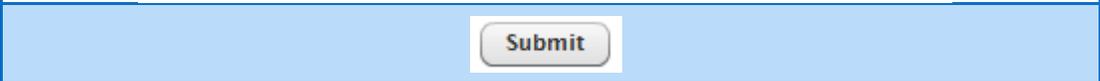
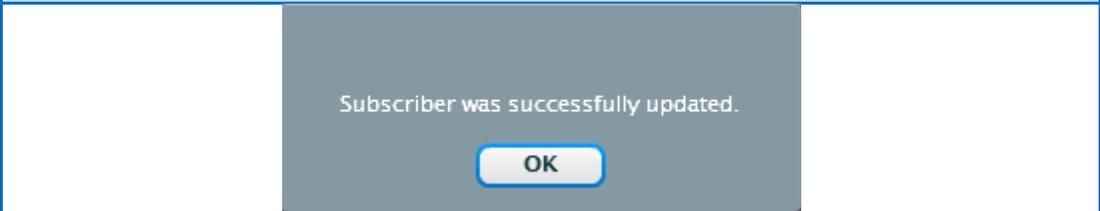
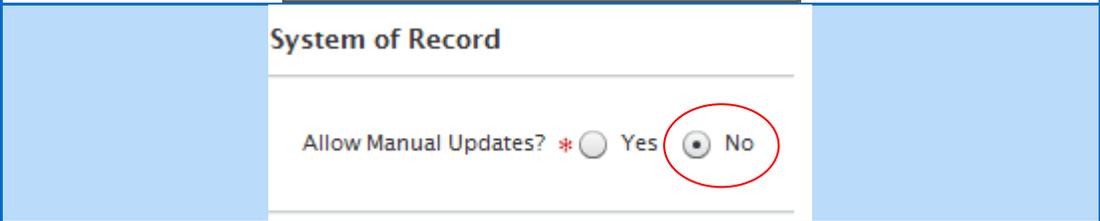
	account.	
	System Timing: After confirmation that the change was added, the member can log online, and view the changes.	
	ADP email communication: No ADP email communication.	
	ADP file frequency: Files sent daily to SHBP.	

DATA SHARING TOOL > DATE OF BIRTH CHANGE

This allows a user with an appropriate security level access to update date of birth for a member.

Note: Only Agencies that do NOT send Automated Files will have access and should use the Data Sharing Tool.

Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the “Member Experience” User Guide for the process.
2	Click Search .	
3	Choose Member Search from the drop down box.	
4	Enter the appropriate member details.	
5	Next to Member Name, click the green arrow, and choose the ‘pencil’ to Update this employee .	
6	Click System of Record .	
7	<p>System of Record must be listed as Yes in order for the account to be updated via the Data Sharing Tool.</p> <p>Note: If the Data Sharing Tool is used on an escalated situation, and the member is normally sent on a file, the regular system that is used to update SHBP must be updated as well to ensure data is not overwritten.</p>	

8	Under Tasks , Click Date of Birth Change .	
9	Enter in the correct Date of Birth.	
10	Verify new Date of Birth submitted is accurate and then choose Submit .	
11	Confirmation of change added displays.	
12	<p>After making changes in the Data Sharing Tool, go back to System of Record, and click No to ensure record is locked.</p> <p>This will set the System of Record back to 'No'.</p>	
	<p>System Timing: After confirmation that the change was added, the member can log online, and view the changes.</p>	
	<p>ADP email communication: No ADP email communication.</p>	
	<p>ADP file frequency: Files sent daily to SHBP.</p>	

DATA SHARING TOOL > LEAVE OF ABSENCE

Leave of Absence is not managed in the Data Sharing Tool or SHBP Enrollment Portal. The SHBP Enrollment Portal will never reflect a member on a Leave of Absence status.

STANDARD EMAIL COMMUNICATIONS > CONFIRMATION

Distributed to:	Any member who has a change to their health plan or rates related to a work, qualifying life or system event and has an email address on file.
Frequency:	Email sent immediately <u>after</u> a member saves an election on the SHBP Enrollment Portal.
Email Text:	<p>To: <Employee - Email Address> From: SHBP Member Services Subject: Review your State Health Benefit Plan (SHBP) Confirmation Statement</p> <p>This message confirms a recent change to your SHBP health benefits. You may review your benefits confirmation statement online at the SHBP Enrollment Portal at mySHBPga.adp.com. Your benefit elections will remain in effect through December 31, <current benefit plan year>unless you experience a Qualifying Event. We recommend that you download or print a copy of your elections to retain for your records.</p> <p>Important Reminder: SHBP requires documentation confirming eligibility of dependents and/or a Qualifying Event, such as a marriage or birth certificate. For information about eligibility for coverage, please refer to the State Health Benefit Plan Decision Guide and Summary Plan Description available at www.dch.georgia.gov/shbp.</p> <p>This documentation must be faxed to SHBP’s secured fax line at 866-828-4796 within 90 days of the Qualifying Event. Failure to submit proper documentation will result in denial of request and coverage will revert to prior coverage.</p> <p>Questions or need more information? Please contact us by phone at 800-610-1863 to speak with a representative. Benefit representatives are available to assist you Monday through Friday from 8:30 am to 5:00 pm, Eastern Time.</p> <p><i>This is a system generated message. Please do not reply to this email as this mailbox does not accept responses, and your message will not be received. This message was generated because of an event that affects your State Health Benefit Plan coverage. It is your responsibility to contact 800-610-1863 if you have any questions about this email. This email may contain general information about eligibility or enrollment in State Health Benefit Plan coverage. Complete information about eligibility and enrollment is set forth in the Plan Documents for the State Health Benefit Plan, which are posted on www.dch.georgia.gov/shbp. If there is a difference between the language in this email and the language in the Plan Documents with respect to your eligibility or enrollment in the State Health</i></p>

	<p><i>Benefit Plan, state law requires that the language in the Plan Documents must be followed. If you think this email was sent to the wrong email address, please call 800-610-1863 immediately, and delete this email.</i></p>
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STANDARD EMAIL COMMUNICATIONS > EVENT WINDOW OPEN

Distributed to:	New Hires
Frequency	Sent on a daily basis after a new hire is sent and loaded into the ADP system.
Email Text	<p>To: Employee - Email Address From: SHBP Member Services Subject: Enroll in your State Health Benefit Plan (SHBP) coverage</p> <p>Welcome! Now is the time to enroll in your SHBP coverage.</p> <p>Your health benefits become effective the first of the month following one full calendar month of employment. If your hire date is concurrent with the first of the month, your coverage is effective on the first of the following month. You must enroll by <enrollment window end date>.</p> <p>To enroll in your health benefits, visit the SHBP Enrollment Portal at mySHBPga.adp.com. If you are using the site for the first time, you will be prompted to register and create a User Name and Password.</p> <p>Once logged in, follow the prompts to elect your health benefits and add dependents. Be sure to click FINISH when you are done to confirm your election. Your elections will not be saved until you click FINISH. You will receive an email confirmation that your benefits have been submitted.</p> <p>Important Reminders: Once you confirm your election, you will not be able to discontinue, change or enroll in health benefits until the next Open Enrollment period, unless you experience a Qualifying Event such as marriage, divorce, birth, adoption or change in work status.</p> <p>SHBP requires documentation confirming eligibility of dependents and/or a Qualifying Event, such as a marriage or birth certificate. For information about eligibility for coverage, please refer to the State Health Benefit Plan Decision Guide and Summary Plan Description available at www.dch.georgia.gov/shbp.</p> <p>This documentation must be faxed to SHBP’s secured fax line at 866-828-4796 within 90 days of Hire Date. Failure to submit proper documentation will result in denial of request and coverage will revert to prior coverage.</p>

Questions or need help?

If you have any questions, you may contact us by phone at 800-610-1863 to speak with a representative. Benefit representatives are available to assist you Monday through Friday from 8:30 am to 5:00 pm, Eastern Time.

This is a system generated message. Please do not reply to this email as this mailbox does not accept responses, and your message will not be received. This message was generated because of an event that affects your State Health Benefit Plan coverage. It is your responsibility to contact 800-610-1863 if you have any questions about this email. This email may contain general information about eligibility or enrollment in State Health Benefit Plan coverage. Complete information about eligibility and enrollment is set forth in the Plan Documents for the State Health Benefit Plan, which are posted on www.dch.georgia.gov/shbp. If there is a difference between the language in this email and the language in the Plan Documents with respect to your eligibility or enrollment in the State Health Benefit Plan, state law requires that the language in the Plan Documents must be followed. If you think this email was sent to the wrong email address, please call 800-610-1863 immediately, and delete this email.

STANDARD EMAIL COMMUNICATIONS > AGE 65; MEDICARE PART B ENROLL

Distributed to:	Actives and retirees turning age 65 or with covered dependent reaching 65
Frequency:	90 days <u>prior</u> to DOB
Email Text:	<p>To: Employee - Email Address From: SHBP Member Services Subject: Review your State Health Benefit Plan (SHBP) coverage</p> <p>As you may know, your health plan option and premium changes when you or a covered dependent [reach age 65][attain Medicare Part B coverage]. Now is the time to review your new coverage and to make changes, if applicable. If you wish to make any changes, you must do so by <enrollment window end date>.</p> <p>To review or make changes to your health benefits, visit the SHBP Enrollment Portal at mySHBPga.adp.com. If you are using the site for the first time, you will be prompted to register and create a User Name and Password.</p> <p>Once logged in, follow the prompts to elect your health benefits. Be sure to click FINISH when you are done to confirm your election. Your elections will not be saved until you click FINISH. You will receive an email confirmation that your benefits have been submitted.</p> <p>Important Reminders: Once you confirm your election, you will not be able to change health benefits until the next Retiree Option Change Period, unless you experience a Qualifying Event.</p> <p>Questions or need help? If you have any questions, you may contact us by phone at 800-610-1863 to speak with a representative. Benefit representatives are available to assist you Monday through Friday from 8:30 am to 5:00 pm, Eastern Time.</p> <p><i>This is a system generated message. Please do not reply to this email as this mailbox does not accept responses, and your message will not be received. This message was generated because of an event that affects your State Health Benefit Plan coverage. It is your responsibility to contact 800-610-1863 if you have any questions about this email. This email may contain general information about eligibility or enrollment in State Health Benefit Plan coverage. Complete information about eligibility and enrollment is set</i></p>

	<p><i>forth in the Plan Documents for the State Health Benefit Plan, which are posted on www.dch.georgia.gov/shbp. If there is a difference between the language in this email and the language in the Plan Documents with respect to your eligibility or enrollment in the State Health Benefit Plan, state law requires that the language in the Plan Documents must be followed. If you think this email was sent to the wrong email address, please call 800-610-1863 immediately, and delete this email.</i></p>
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STANDARD EMAIL COMMUNICATIONS > DEPENDENT AGE OUT CONFIRM/REMINDER

Distributed to:	Any employee who has a dependent who will age out (turn 26) in 31 days.
Frequency:	Email is sent 31 days <u>prior</u> to event.
Email Text:	<p>To: <Employee - Email Address> From: SHBP Member Services Subject: Changes to Your State Health Benefit Plan (SHBP)</p> <p>This message confirms an upcoming change to your SHBP health benefits. A dependent currently covered on your State Health Benefit Plan will reach age 26 and will no longer be covered at the end of the month in which the child reaches age 26. If this is the only child under your plan the coverage tier will be change and your premium reduced.</p> <p>If your dependent was disabled prior to their 26 birthday, he/she may be eligible for continuation of coverage under the disabled dependent provision of the Plan. A disabled dependent questionnaire can be downloaded at http://dch.georgia.gov/eligibility-forms within 90 days of the child’s loss of coverage under the Plan to request continuation. Your dependent will not have coverage until documentation is received and approved. If coverage is approved it will be updated back to the expiration date. If your tier was changed, additional premiums will be due and must be submitted before coverage is updated.</p> <p>Your dependent child who does not qualify under the disabled dependent provision may enroll in Temporary Extended Coverage by paying the full cost of coverage under COBRA. You must contact SHBP at 800-610-1863-COBRA Option within 60 days of your dependent’s coverage termination to request an application</p> <p>Important Reminder: For information about eligibility for coverage, please refer to the State Health Benefit Plan Decision Guide and Summary Plan Description available at www.dch.georgia.gov/shbp.</p> <p>Questions or need more information? Please contact us by phone at 800-610-1863 to speak with a representative. Benefit representatives are available to assist you Monday through Friday from 8:30 am to 5:00 pm, Eastern Time.</p>

	<p><i>This is a system generated message. Please do not reply to this email as this mailbox does not accept responses, and your message will not be received. This message was generated because of an event that affects your State Health Benefit Plan coverage. It is your responsibility to contact 800-610-1863 if you have any questions about this email. This email may contain general information about eligibility or enrollment in State Health Benefit Plan coverage. Complete information about eligibility and enrollment is set forth in the Plan Documents for the State Health Benefit Plan, which are posted on www.dch.georgia.gov/shbp. If there is a difference between the language in this email and the language in the Plan Documents with respect to your eligibility or enrollment in the State Health Benefit Plan, state law requires that the language in the Plan Documents must be followed. If you think this email was sent to the wrong email address, please call 800-610-1863 immediately, and delete this email.</i></p>
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OPEN ENROLLMENT EMAIL COMMUNICATIONS > OPEN ENROLLMENT CONFIRM

Distributed to:	Any employee who makes an election during Open Enrollment (OE).
Frequency:	Email sent immediately <u>after</u> a member saves an OE election on the SHBP Enrollment Portal site.
Email Text:	<p>To: <Employee - Email Address> From: SHBP Member Services Subject: Review your State Health Benefit Plan (SHBP) Open Enrollment Confirmation Statement</p> <p>This message confirms that your 20XX Open Enrollment health benefits election has been submitted. You may review your benefits confirmation statement online at the SHBP Enrollment Portal at https://mySHBPga.adp.com. Your elections will become effective January 1, <current benefit plan year>, and will remain in effect through December 31, <current benefit plan year>, unless you experience a Qualifying Event. We recommend you download or print a copy of your elections to retain for your records.</p> <p>Important Reminder:</p> <p>SHBP requires documentation confirming eligibility of dependents and/or a Qualifying Event, such as a marriage or birth certificate. For information about eligibility for coverage, please refer to the State Health Benefit Plan Decision Guide and Summary Plan Description available at www.dch.georgia.gov/shbp.</p> <p>This documentation must be faxed to SHBP’s secured fax line at 866-828-4796 within 90 days of the Qualifying Event. Failure to submit proper documentation will result in denial of request and coverage will revert to prior coverage.</p> <p>Questions or need more information?</p> <p>Please contact us by phone at 800-610-1863 to speak with a representative. Benefit representatives are available to assist you Monday through Friday from 8:30 am to 5:00 pm, Eastern Time.</p>

Email Text	<p><i>This is a system generated message. Please do not reply to this email as this mailbox does not accept responses, and your message will not be received. This message was generated because of an event that affects your State Health Benefit Plan coverage. It is your responsibility to contact 800-610-1863 if you have any questions about this email. This email may contain general information about eligibility or enrollment in State Health Benefit Plan coverage. Complete information about eligibility and enrollment is set forth in the Plan Documents for the State Health Benefit Plan, which is posted on www.dch.georgia.gov/shbp. If there is a difference between the language in this email and the language in the Plan Documents with respect to your eligibility or enrollment in the State Health Benefit Plan, state law requires that the language in the Plan Documents must be followed. If you think this email was sent to the wrong email address, please call 800-610-1863 immediately, and delete this email.</i></p>
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