

# SHBP ENROLLMENT PORTAL: ADP USER GUIDE

## ADMIN EXPERIENCE (AGENCIES USING THE DATA SHARING TOOL)

Rev. 08/01/2013



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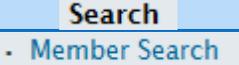
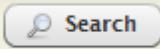
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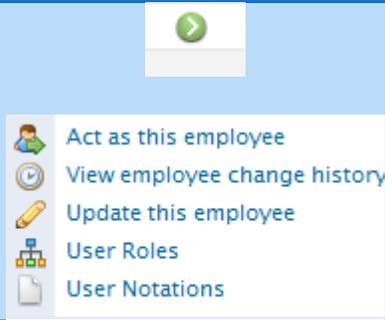
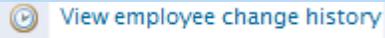
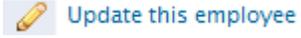
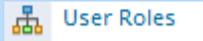
**Note: Please ensure that you only have one instance of the SHBP Enrollment Portal site open at one time. Working on multiple instances will cause a system error.**

## 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.

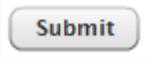
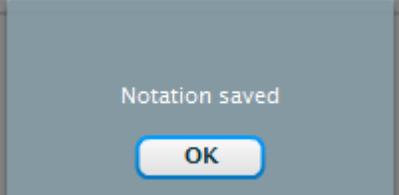
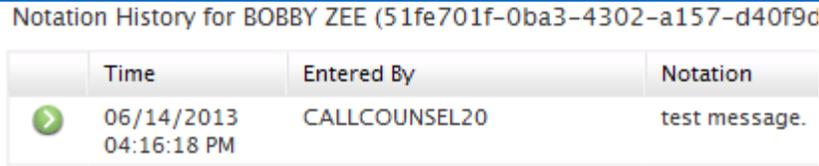
Steps	Process Flow Instructions	Screen Shot												
1	Log on to the SHBP Enrollment Portal.	See the member log on process.												
2	Click <b>+</b> next to the <b>Search</b> button to expand.													
3	Choose <b>Member Search</b> .													
4	There are two types of search available: <ul style="list-style-type: none"> <li>• <b>Basic Search</b> accepts a full or partial last name (using % as a multi-character wild card, as needed) or a complete Social Security Number (SSN).</li> <li>• <b>Advance Search</b> accepts full or partial first or last names as well as a complete SSN.</li> </ul>													
5	Enter member criteria to search.													
6	Click <b>Search</b> .													
7	The search results will display.  Please note: <b>Person ID</b> is an ADP assigned number only; no impact to SHBP.	 <table border="1"> <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									

<p><b>8</b></p>	<p>Click the green arrow, and several options will display.</p> <p>Note: <b>User Roles</b> feature will not be seen by all Admins.</p>	
<p><b>9</b></p>	<p><b>Act as this employee</b> returns you to the Welcome page with the notice that you are “Acting as &lt;member name&gt;”. This enables you to:</p> <ul style="list-style-type: none"> <li>- Make elections on behalf of the member</li> <li>- Declare Life Events</li> <li>- Review <b>Current Enrollment</b> and <b>Employee Profile</b> screens</li> </ul>	
<p><b>10</b></p>	<p><b>View employee change history</b>                  Navigates to the <b>Employee Profile</b> page, from which you can also view the <b>Summary</b> and <b>Timeline</b> pages for this member.</p>	
<p><b>11</b></p>	<p><b>Update this employee</b>                  Navigates to the <b>Data Sharing Tool</b> which allows updates to add or edit member indicative data.</p>	
<p><b>12</b></p>	<p><b>User Roles</b>                  Allows security access to be defined for Admins.                  Only certain SHBP Admins will have this access, although this may be a feature rolled out in the future to additional groups.</p>	
<p><b>13</b></p>	<p><b>User Notations,</b>                  Allows an Admin to enter notes on a member’s account.</p>	

## USER NOTATIONS

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

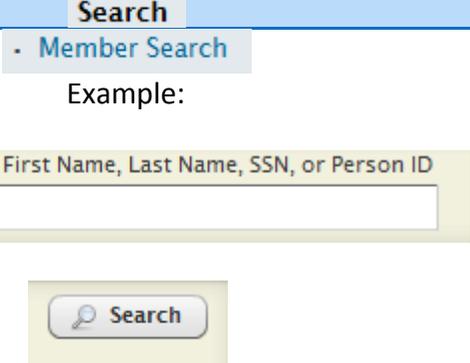
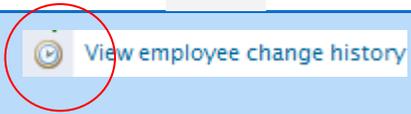
Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click <b>Search</b> .	
3	Choose <b>Member Search</b> from the drop down box.	
4	Enter the appropriate member details.	
7	The search results will display.	
8	Click the green arrow, and several options will display.  Note: The <b>User Roles</b> feature will not be seen by all Admins.	

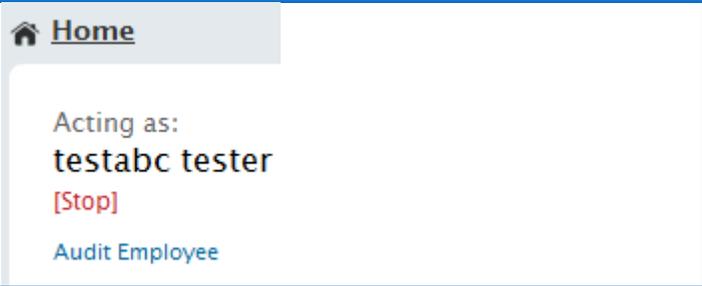
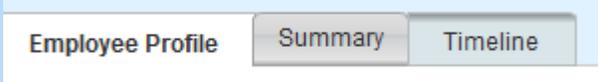
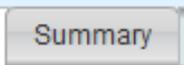
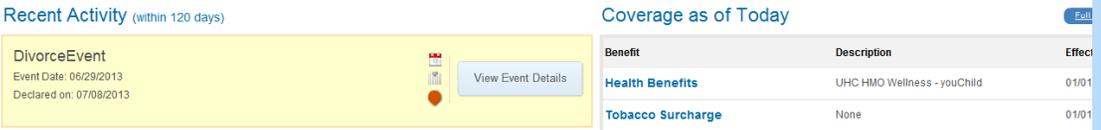
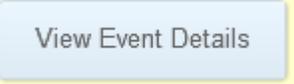
<p><b>9</b></p>	<p>Choose <b>User Notations</b>, and enter the notes* desired for the member.</p> <p>*4k Character limitation.</p>									
<p><b>10</b></p>	<p>Choose <b>Submit</b> to save comments to the system.</p>									
<p><b>11</b></p>	<p>Confirmation of saved notation will appear.</p>									
<p><b>12</b></p>	<p>To view historical notes in the system, click <b>View Notations</b>, and expand the icon.</p>									
<p><b>13</b></p>	<p>Previous notes will display.</p>	 <table border="1"> <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.							

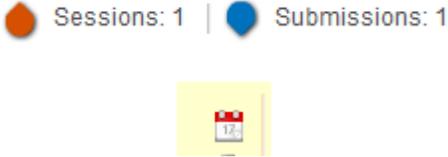
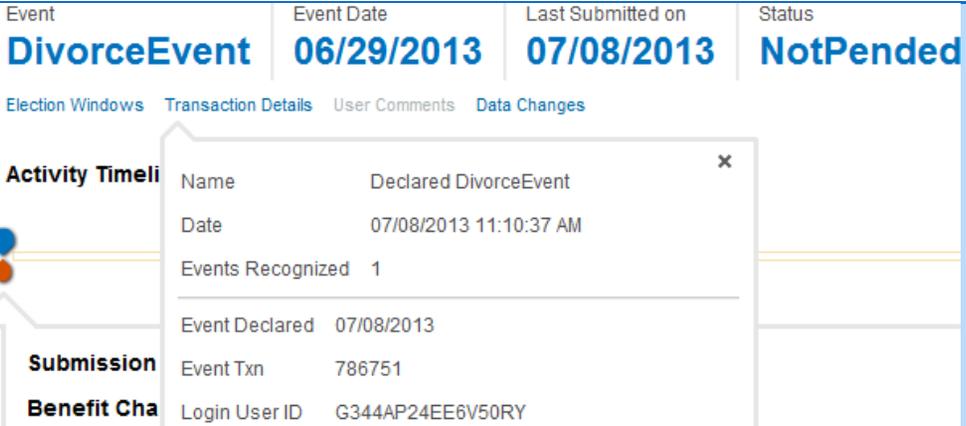
## VIEW EMPLOYEE CHANGE HISTORY > AUDIT FEATURE

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 log on process.								
2	Click <b>+</b> next to the <b>Search</b> button to expand.									
3	Choose <b>Member Search</b> , and enter the member criteria that you want to review. Click <b>Search</b> .	 <p>Example:</p>								
4	Search results will display.	<p>Example:</p> <table border="1"> <thead> <tr> <th></th> <th>First Name</th> <th>Last Name</th> <th>Person ID</th> </tr> </thead> <tbody> <tr> <td></td> <td>testabc</td> <td>tester</td> <td>2941</td> </tr> </tbody> </table>		First Name	Last Name	Person ID		testabc	tester	2941
	First Name	Last Name	Person ID							
	testabc	tester	2941							
5	Click the green arrow.									
6	Choose Option 1 to <b>View employee change history</b> .  Click the clock icon, or									

<p><b>7</b></p>	<p>Choose Option 2 to <b>View employee change history/Audit</b></p> <p>On left hand side of the screen, choose <b>Audit Employee</b>.</p>																												
<p><b>8</b></p>	<p>Regardless of what option is chosen, the first page that displays is <b>Employee Profile</b>.</p> <p>This will house all of the employee demographic information</p> <p>Note: The <b>Employee Profile</b> is also available to the member from the right-hand navigation bar.</p>																												
<p><b>9</b></p>	<p>Click the <b>Summary</b> tab.</p>																												
<p><b>10</b></p>	<p>The <b>Summary</b> tab lists recent activity on the left and current benefits and effective dates for the selected member and dependents on the right.</p>																												
<p><b>11</b></p>	<p>Click <b>View Event Details</b>.</p>																												
<p><b>12</b></p>	<p>The <b>View Event Details</b> page opens a new page, and drills down to information about the benefit elections related to the event. (e.g., what the member changed <i>from</i> and then changed <i>to</i>)</p>	 <table border="1"> <thead> <tr> <th colspan="9">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> <th></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</td> <td>→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><b>13</b></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 <b>Data Changes</b>, 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><b>14</b></p>	<p><b>Transaction Details</b> shows what caused the change, such as an event or a file load.</p>	

<p><b>15</b></p>	<p><b>Session Details</b> Shows the amount of time a member is online for specific Qualifying Events.</p> <p><b>Session Activity:</b> Confirmed means the member saved their elections.</p> <p><b>Session Activity:</b> 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><b>HR Admin</b> - This will show who processed the enrollment. Call Counselor will be the ADP team. If the actual SHBP ADMIN that made the election it will list the HR Admin's name.</p> <p>Note: When an employee processes their OWN elections the HR Admin will not show in the audit history.</p>	<p><b>Session Details</b></p> <p>Start Timestamp 07/08/2013 11:10:40 AM</p> <p>End Timestamp 07/08/2013 11:13:38 AM</p> <p>Session Duration 00:02:58</p> <p>Session Activity Confirmed</p> <p>HR Admin agravesUAT@adp</p> <p>Session Activity Canceled without saving</p>
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**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.

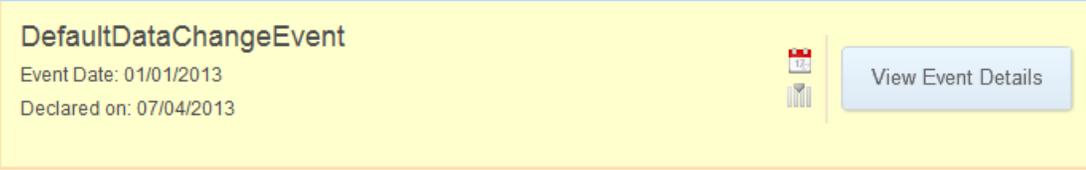
Coverage Timeline as of:

**07/08/2013** 📅

View by Event

1/1/2013

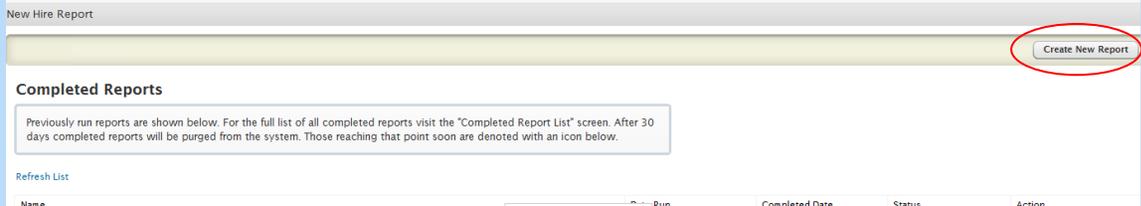
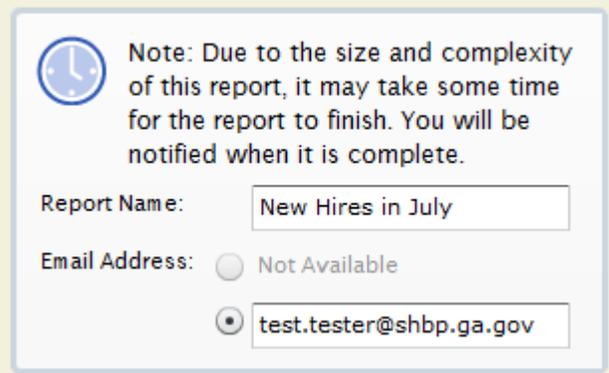
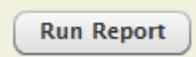
7/8/2013 ⌵

<p><b>18</b></p>	<p><b>Note:</b> Summary Tab &gt; 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>The screenshot shows a yellow highlighted box with the following content:</p> <ul style="list-style-type: none"> <li><b>DefaultDataChangeEvent</b></li> <li>Event Date: 01/01/2013</li> <li>Declared on: 07/04/2013</li> <li>Calendar icon</li> <li>View Event Details button</li> </ul>
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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.

Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	On the Home page, click + next to <b>Reports</b> .	
3	List of available reports will display.	
4	To create a new report click on the name of the report and then choose “Create New Report”.  Screen shot is example.	

		
<p><b>5</b></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 use the Cost Center to pull their specific Agency Reports.</p> <p>Note: The HR Admin running the report will only see Cost Centers that they have security access to. However all Locations will list; but reports generate based on the security of the Cost Center.</p>		
<p><b>6</b></p> <p>Put in the name of the report you would like to generate and enter an email in the next box.*</p> <p>*If you have an email on file it will auto-generate.</p> <p>An email will be sent once the report is completed.</p>		
<p><b>7</b></p>	<p>Click On <b>“Run Report”</b>.</p> <p>Status of the report will show at the bottom</p>	

	of the screen.	<div style="border: 1px solid #ccc; padding: 5px; width: fit-content; margin: auto;"> <p style="text-align: center;">Status</p> <p style="text-align: center;">SUBMITTED (New)</p> </div>								
	<p><b>Viewing Reports:</b> The system will send an email once the report is generated.</p> <p>Access the OBA system and go back to the report that was just ran. Final report will show under the Action Column.</p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 25%;">Date Run</th> <th style="width: 25%;">Completed Date</th> <th style="width: 25%;">Status</th> <th style="width: 25%;">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 style="text-align: center;">  </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)								
	The report can be exported into excel or it can be viewable on the web or if need be can be deleted.	<div style="border: 1px solid #ccc; padding: 5px; width: fit-content; margin: auto;"> <ul style="list-style-type: none"> <li> Download as Excel</li> <li> View Report</li> <li> Delete Report</li> </ul> </div>								

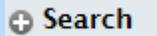
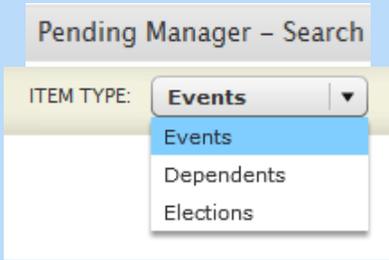
## PENDING MANAGER

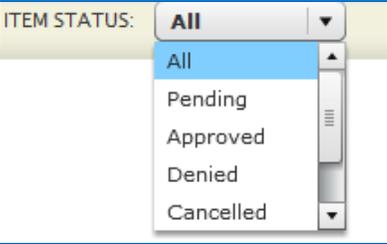
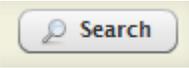
HR Admin users can use Pending Manager search to do the following:

- 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

From **HR Tools**, you can search for any pending activity based on selection parameters and then act on the pending activity.

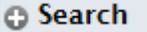
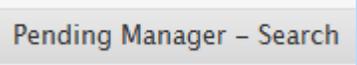
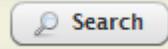
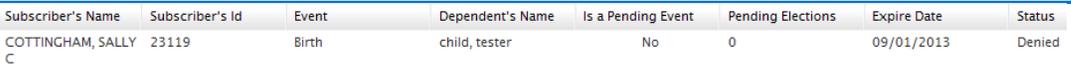
### SEARCHING FOR PENDING ACTIVITY VIA STATUS

Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click <b>Search</b> .	
3	Select <b>Pending Manager</b> in the drop down box.	
4	<p>An HR Admin user can use <b>Pending Manager</b> to search for pending activity based on the following:</p> <ul style="list-style-type: none"> <li>• <b>Item Type</b> of Event, Dependents, or Elections.</li> <li>• <b>Item Status</b> of All, Pending, Approved, Denied, Cancelled, Expired, or Ineligible.</li> </ul> <p>As with <b>Member Search</b>, <b>Pending Manager</b> provides both basic and advanced search capabilities including search by subscriber name, SSN, and Person ID, as well as by event name.</p>	

	<p><b>Note: Election Type</b> does not apply to SHBP. <b>Events</b> and <b>Dependents</b> do.</p>																									
<p><b>5</b></p>	<p>After choosing the <b>Item Status</b>, select <b>Search</b>.</p>																									
<p><b>6</b></p>	<p>This is an example of <b>Pending Status</b>.</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>	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
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<p><b>7</b></p>	<p>This is an example of <b>Denied Status</b>.</p>	 <p>Pending Manager – Search</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>	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

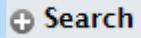
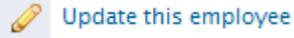
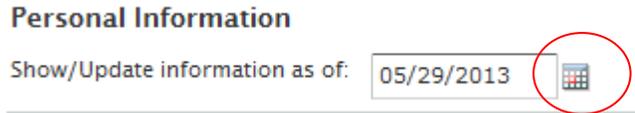
Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click <b>Search</b> .	
3	Select <b>Pending Manager</b> in the drop down box.	
4	At the <b>Pending Manger- Search</b> screen, choose  .	
5	This opens a screen for you to enter specific search criteria:	
6	After entering the data elements, (i.e. member first and last name), click <b>Search</b> .	
7	Search result display on next screen.	

## EMPLOYEE INDICATIVE DATA CHANGES: ACTIVE AND RETIRED EMPLOYEE > 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, SSN changes) 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.

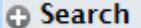
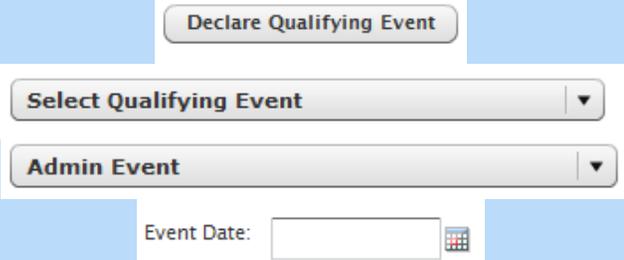
*Note: Retirees are able to update their address on their OWN after logging onto the ADP System.*

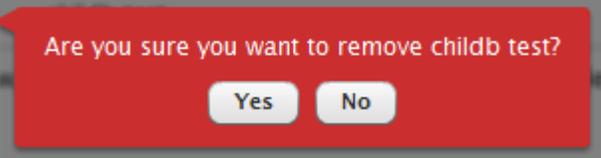
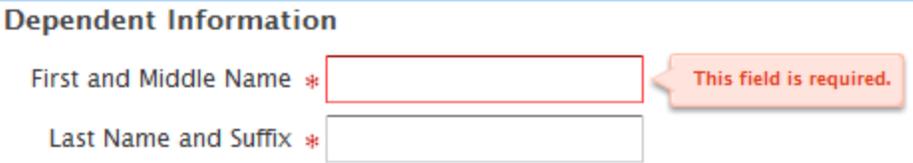
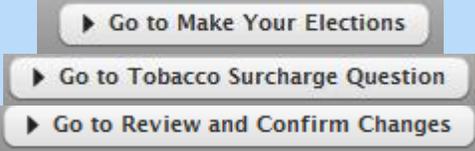
Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click <b>Search</b> .	
3	Choose <b>Member Search</b> from the drop down box.	
4	Enter the appropriate member details.	
5	Choose <b>Update this employee</b> .	
6	On the <b>Update Subscriber</b> screen, choose <b>Personal</b> .	
7	Enter the effective date into system using the calendar feature icon.  <b>Note:</b> The date cannot be prior to 1/1/13.	
8	Click <b>Submit</b> to have changes sent to the SHBP Enrollment Portal.  <b>Critical:</b> 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.  <b>Note:</b> Review all changes prior to submission in order to ensure the accuracy of data entry.	
	<b>ADP email communication:</b> No ADP email communication.	
	<b>ADP file frequency:</b> Update on SHBP Enrollment Portal is immediate.	

## DEPENDENT INDICATIVE DATA CHANGE

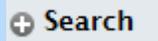
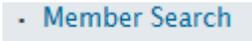
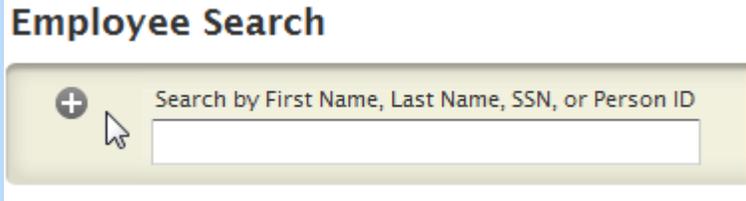
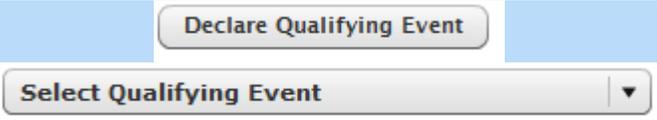
This allows **user with appropriate security level access** to update indicative data (i.e. spelling of name, birth date, SSN changes) on a dependent.

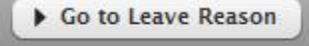
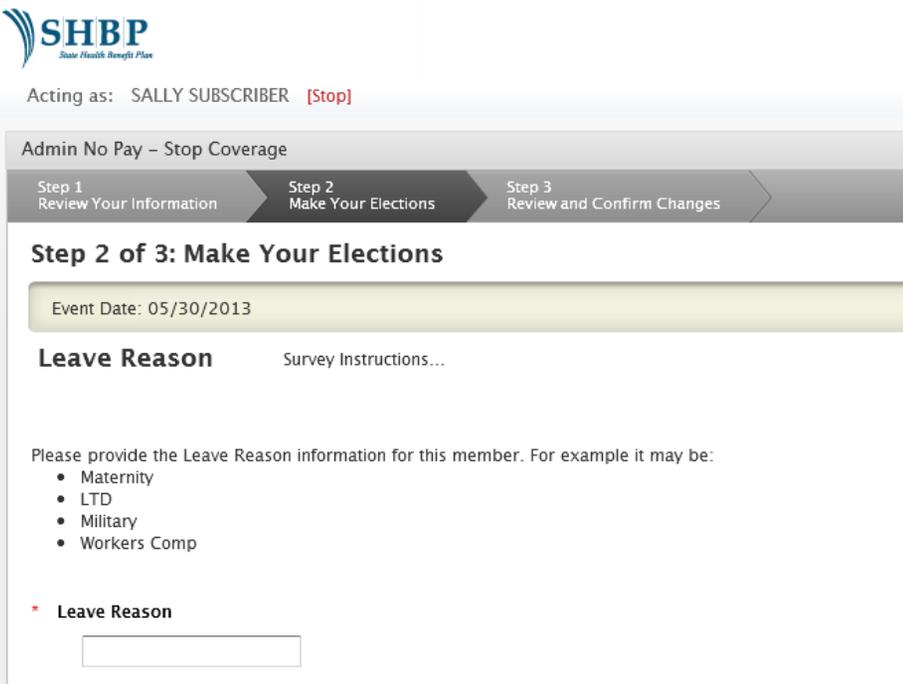
Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click <b>Search</b> .	
3	Choose <b>Member Search</b> from the drop down box.	
4	Enter the appropriate member details.	
5	Choose <b>Act as this employee</b> .	
6	<b>Declare Qualifying Event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

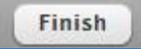
<p><b>10</b></p>	<p>Click <b>Yes</b> to confirm the dependent should be removed.</p>	
<p><b>11</b></p>	<p>Next, add the dependent back into the system with the appropriate details by clicking <b>Add a Dependent</b>.</p>	
<p><b>12</b></p>	<p>The <b>Add Dependent Information</b> screen displays with required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

## 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 log on process.
2	Click <b>Search</b> .	
3	Choose <b>Member Search</b> from the drop down box.	
4	Enter the appropriate member details.	
5	Choose <b>Act as this employee</b> .	
6	Click <b>Declare a Qualifying Life Event</b> , and <b>Select Qualifying Event</b> .	
7	Choose <b>Admin No Pay - Stop Coverage</b> , and enter the <b>Event Date</b> .  Note: The <b>Event Date</b> should be the first day after coverage ends.	

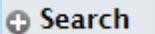
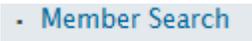
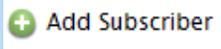
8	Click <b>Submit</b> .	
9	Review the <b>Current Enrollment</b> screen, and move through the following screens reviewing details on each.	
10	Make necessary enrollment change for health benefits. (i.e., tier level change, drop coverage etc.)	
11	Click <b>Go to Leave Reason</b> .	
12	Answer the survey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

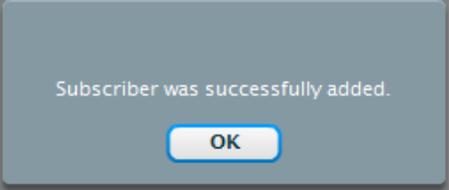
13	After the <b>Leave Reason</b> is entered, click <b>Go to Review and Confirm Changes</b> .	
14	Complete the enrollment by clicking <b>Finish</b> .	
	<p><b>ADP email communication:</b> No email communication sent.</p> <p><b>File Timing:</b> Daily changes sent to SHBP.</p>	

## 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 log on process.
2	Click <b>Search</b> .	
3	Choose <b>Member Search</b> 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 <b>Add Subscriber</b> .	
7	<p>The <b>Add Subscriber</b> 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><b>Note:</b></p> <ul style="list-style-type: none"> <li>Depending on the field type, select text from a drop down list or select from the data picker.</li> </ul>	<p>Example:</p> 

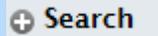
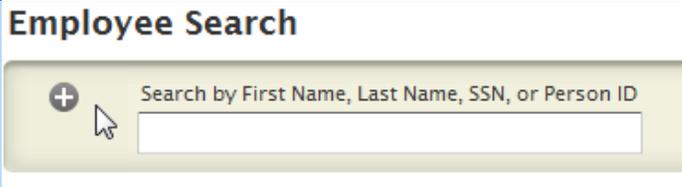
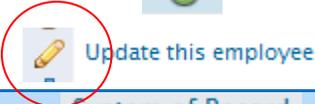
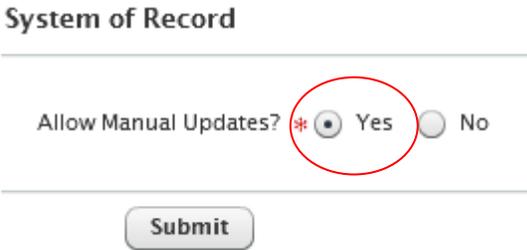
	<ul style="list-style-type: none"> <li>Benefit eligibility rules are enforced by the ADP system. To minimize any member impact for enrollment opportunity, ensure accuracy of data entry.</li> <li>If at all possible, enter an email address for the member. This will ensure the new member notified with a “New Enrollment” notification email.</li> </ul>	
8	After all required fields are entered, click: <b>Submit.</b>	
9	Confirmation of the newly added member appears.	
10	<p><b>Note:</b> 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><b>NEXT STEP:</b> Contact SHBP DCH team to coordinate access and the transfer.</p>	
11	<b>System Timing:</b> After confirmation that the member was added, the member can log in online, register and make their enrollments.	
	<b>ADP email communication:</b> New Hire Window	

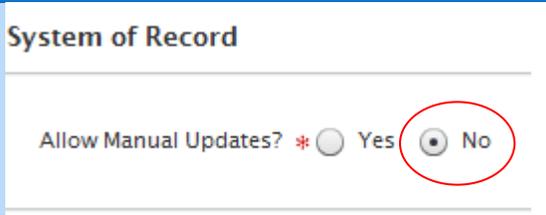
	email will be sent if email address is on file.	
	<b>ADP file frequency:</b> Files sent daily to SHBP.	

**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.

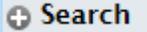
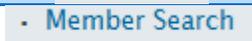
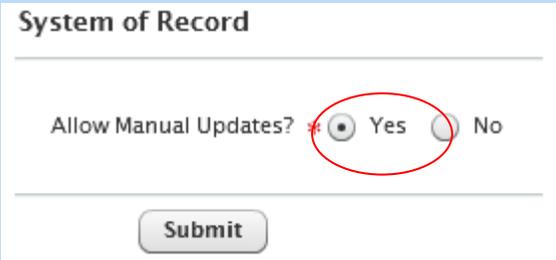
Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click <b>Search</b> .	
3	Choose <b>Member Search</b> from the drop down box.	
4	Enter the appropriate member details.	
5	Next to Member Name, click the green arrow, and choose the 'pencil'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

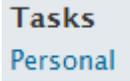
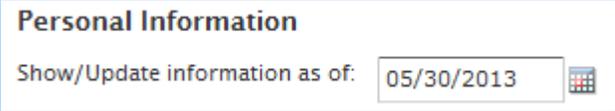
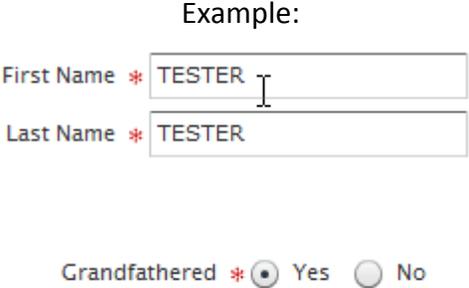
<p><b>8</b></p>	<p>After making changes in the Data Sharing Tool, go back to <b>System of Record</b>, and click <b>No</b> to ensure record is locked.</p> <p>This will set the <b>System of Record</b> back to 'No'.</p>	 <p>The screenshot shows a section titled "System of Record". Below the title is a horizontal 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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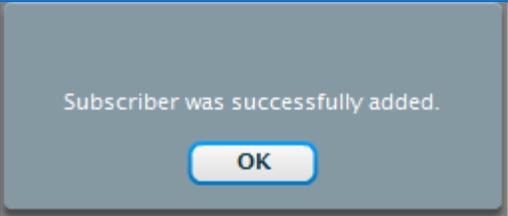
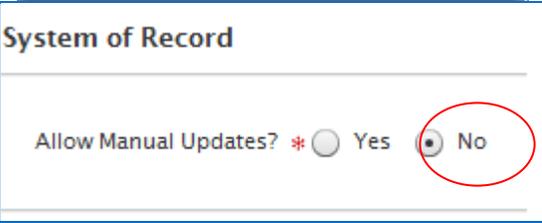
## DATA SHARING TOOL > PERSONAL

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 log on process.
2	Click <b>Search</b> .	
3	Choose <b>Member Search</b> 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 <b>Update this employee</b> .	
6	<p><b>System of Record</b> must be listed as <b>Yes</b> in order for the account to be updated via the Data Sharing Tool.</p> <p><b>Critical:</b> 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><b>Note:</b> If the Data Sharing Tool is used on an escalated</p>	

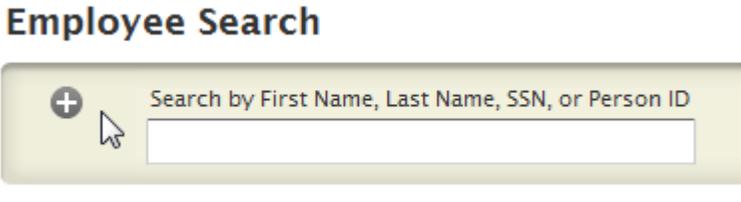
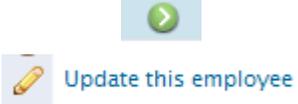
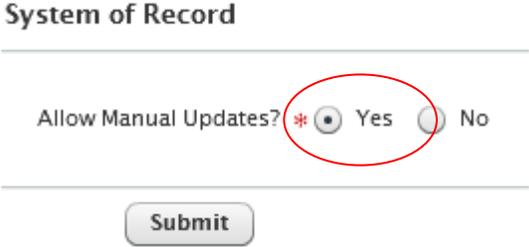
	<p>situation, and the member is normally sent on a file, the regular system that is used to update SHBP must be updated as well to ensure data is not overwritten..</p>	
<p>7</p>	<p>The <b>Update Subscriber</b> page displays.</p> <p>Under Tasks, choose <b>Personal</b>.</p>	
<p>8</p>	<p>Enter the effective date of the change.</p> <p><b>Note:</b> 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><b>Grandfather Question must be answered.</b> 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><b>Note:</b></p> <ul style="list-style-type: none"> <li>• Depending on the field type, select text from a drop down list or select from the data picker.</li> <li>• Benefit eligibility rules are enforced by the ADP system. To minimize any member impact for enrollment opportunity, ensure the accuracy of data entry.</li> </ul>	
<p>10</p>	<p>After all required fields are entered click:, <b>Submit</b>.</p>	

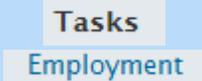
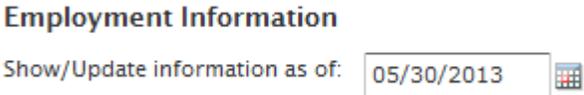
<p><b>11</b></p>	<p>Confirmation of changes added displays.</p>	
<p><b>12</b></p>	<p>After making changes in the Data Sharing Tool, go back to <b>System of Record</b>, and click <b>No</b> to ensure record is locked.</p> <p>This will set the <b>System of Record</b> back to 'No'.</p>	
	<p><b>System Timing: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

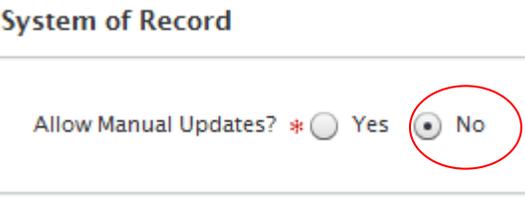
**DATA SHARING TOOL > EMPLOYMENT**

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 log on process.
2	Click <b>Search</b> .	
3	Choose <b>Member Search</b> from the drop down box.	
4	Enter the appropriate member details.	
5	Next to <b>Member Name</b> , click the green arrow, and choose the 'pencil' to <b>Update this employee</b> .	
6	Click <b>System of Record</b> .	
7	<p><b>System of Record</b> must be listed as <b>Yes</b> in order for the account to be updated via the Data Sharing Tool.</p> <p><b>Note:</b> 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><b>8</b></p>	<p>The <b>Update Subscriber</b> page displays.</p> <p>Under <b>Tasks</b>, choose <b>Employment</b>.</p>	
<p><b>9</b></p>	<p>Enter the effective date of the change.</p> <p><b>Note:</b> Typically this is the date of hire or date of marriage, for example.</p>	
<p><b>10</b></p>	<p>Update the desired employment data changes.</p> <ul style="list-style-type: none"> <li>• Weekly compensation</li> <li>• Hours</li> <li>• Premium Type for Retirees</li> </ul> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>• Depending on the field type, select text from a drop down list or select from the data picker.</li> <li>• Hire Date and Original Hire Date functionality may be revised; these items will only be visible.</li> </ul>	
<p><b>11</b></p>	<p>After all required fields are entered, click: <b>Submit</b>.</p>	
<p><b>12</b></p>	<p>Confirmation of changes added displays.</p>	

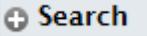
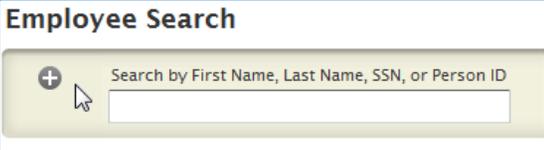
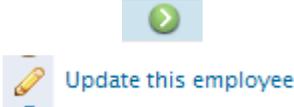
<p><b>13</b></p>	<p>After making changes in the Data Sharing Tool, go back to <b>System of Record</b>, and click <b>No</b> to ensure record is locked.</p> <p>This will set the <b>System of Record</b> back to <b>'No'</b>.</p>	 <p>The screenshot shows the 'System of Record' section with a horizontal line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

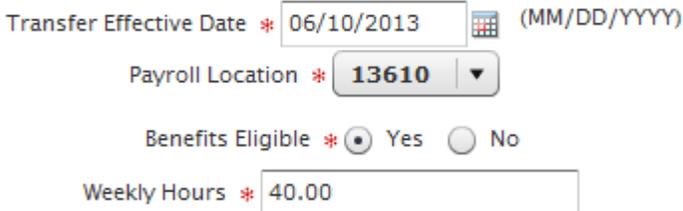
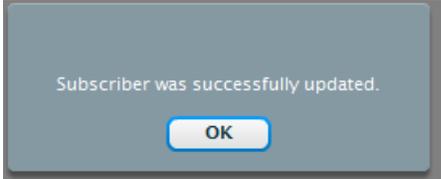
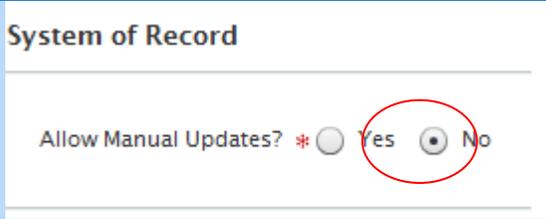
## DATA SHARING TOOL > TRANSFER

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. Due to the security restriction, most of the use of transfer function could be from the SHBP Staff.
- 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.

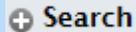
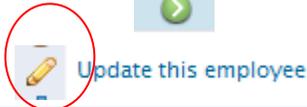
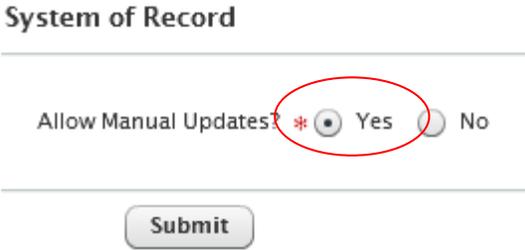
Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click <b>Search</b> .	
3	Choose <b>Member Search</b> from the drop down box.	
4	Enter the appropriate member details.	
5	Next to Member Name, click the green arrow, and choose the ‘pencil’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

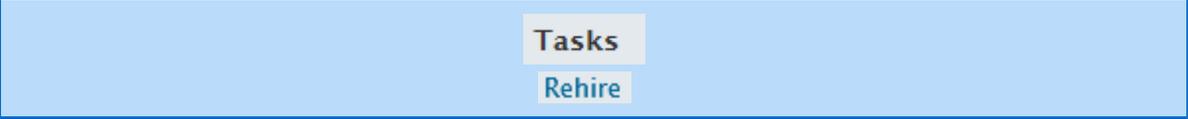
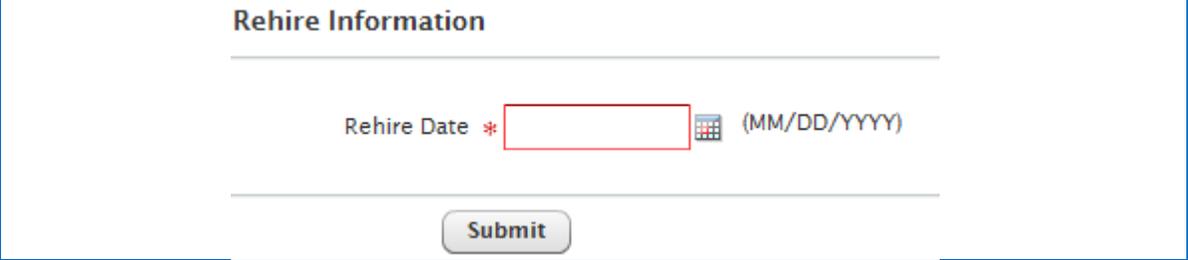
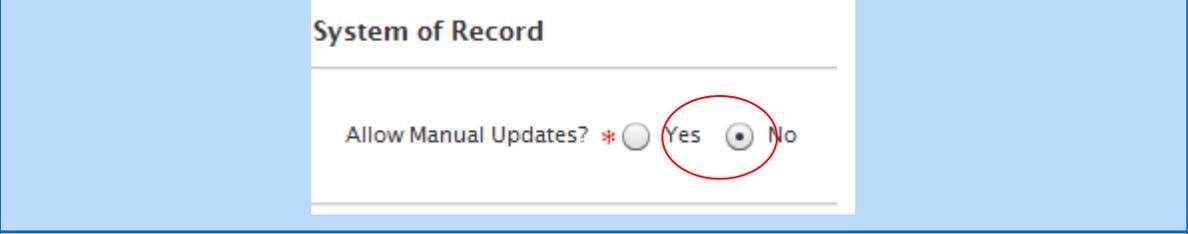
8	Click <b>Transfer</b> .	Transfer
9	<p>The following fields must be updated:</p> <ul style="list-style-type: none"> <li>• Effective Date (as date of the transfer)</li> <li>• Payroll Location (verify accuracy)</li> <li>• Benefits Eligible</li> <li>• Weekly Hours</li> </ul> <p><b>Note:</b> The transfer effective date is the date the member joined the new Payroll Location/ Agency.</p>	
10	Once complete, click <b>Submit</b> .	Submit
11	Confirmation of the save displays.	
12	<p>After making changes in the Data Sharing Tool, go back to <b>System of Record</b>, and click <b>No</b> to ensure record is locked.</p> <p>This will set the <b>System of Record</b> back to 'No'.</p>	
	<p><b>System Timing:</b> 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><b>ADP email communication:</b> No ADP email communication.</p>	
	<p><b>ADP file frequency:</b> Files sent daily to SHBP.</p>	

## 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 log on process.
2	Click <b>Search</b> .	
3	Choose <b>Member Search</b> 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 <b>Update this employee</b> .	
6	Click <b>System of Record</b> .	
7	<p><b>System of Record</b> must be listed as <b>Yes</b> in order for the account to be updated via the Data Sharing Tool.</p> <p><b>Note:</b> 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>	

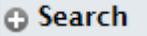
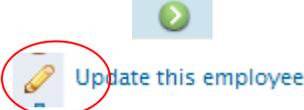
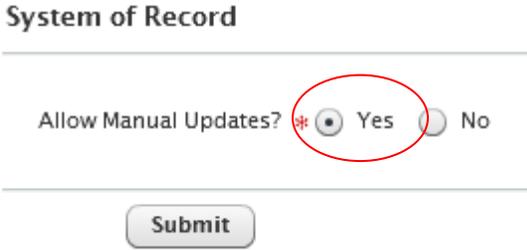
	as well to ensure data is not overwritten.	
8	The <b>Update Subscriber</b> page displays.  Under <b>Tasks</b> , choose <b>Rehire</b> .	
9	On the Rehire Information screen, enter the rehire date in the <b>Adjusted Hire Date</b> field.	
11	After all required fields are entered, click <b>Submit</b> .	
12	Confirmation of the changes added displays.	
13	After making changes in the Data Sharing Tool, go back to <b>System of Record</b> , and click <b>No</b> to ensure record is locked.  This will set the <b>System of Record</b> back to 'No'.	
	<b>System Timing:</b> After confirmation that the change was added, the member can log online, and view the changes.	
	<b>ADP email communication:</b> If the member is hired within 31 days and has an email address on file, the New Hire email	

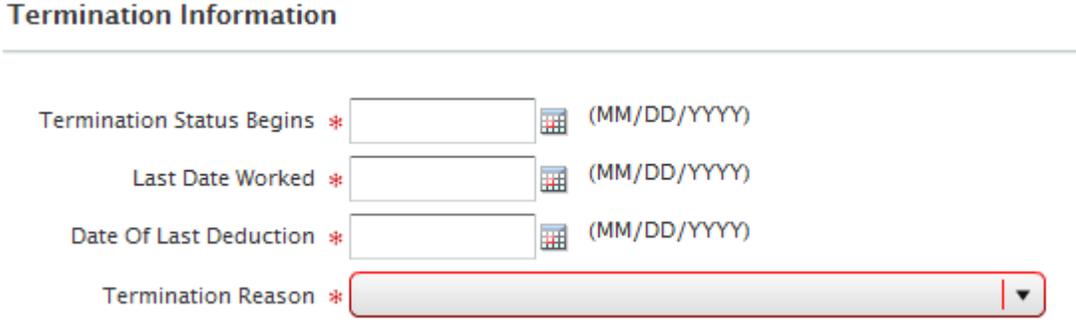
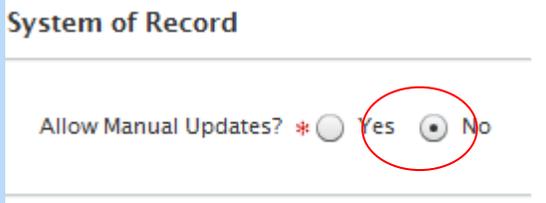
	will be sent.	
	<b>ADP file frequency:</b> Files sent daily to SHBP.	

## 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 log on process.
2	Click <b>Search</b> .	
3	Choose <b>Member Search</b> 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 <b>System of Record</b> .	
7	<p><b>System of Record</b> must be listed as <b>Yes</b> in order for the account to be updated via the Data Sharing Tool.</p> <p><b>Note:</b> 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>	

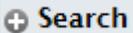
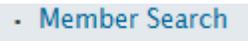
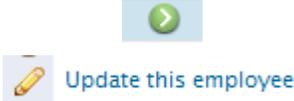
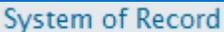
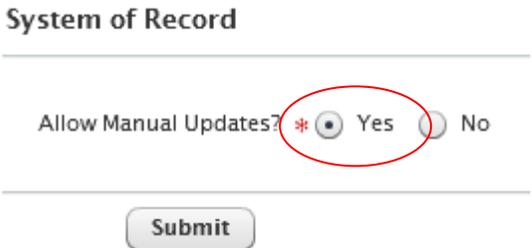
<p><b>8</b></p>	<p>The <b>Update Subscriber</b> page displays.</p> <p>Under <b>Tasks</b>, choose <b>Termination</b>.</p>	
<p><b>9</b></p>	<p>On the Termination Information screen, enter the Termination date and the coverage end date. Select the <b>Termination Reason</b> from the drop down box.</p> <p>Term Date = the first day no longer employed. Last day worked = Last day working</p> <p><b>Note:</b> A voluntary piece will be added and defaulted to YES.</p>	
<p><b>11</b></p>	<p>After all required fields are entered, click: <b>Submit</b>.</p>	
<p><b>12</b></p>	<p>Confirmation of changes added displays.</p>	
<p><b>13</b></p>	<p>After making changes in the Data Sharing Tool, go back to <b>System of Record</b>, and click <b>No</b> to ensure record is locked.</p> <p>This will set the <b>System of Record</b> back to 'No'.</p>	
	<p><b>System Timing:</b> After confirmation that the change was added, the Admin can log online, and view the changes.</p>	

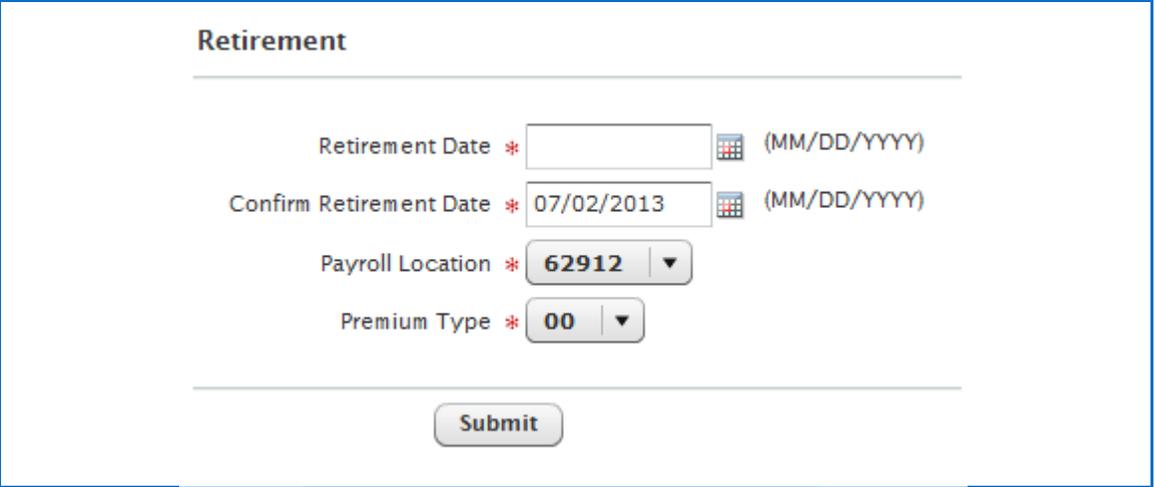
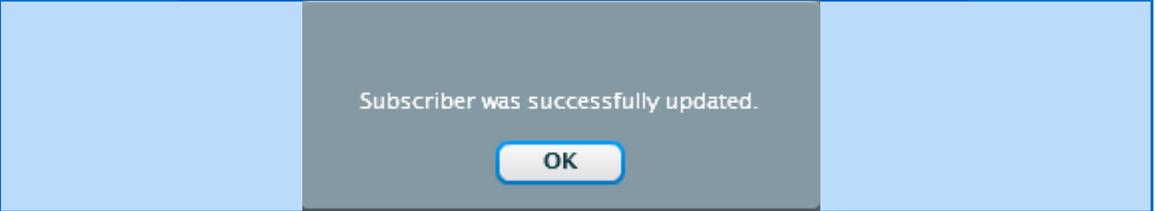
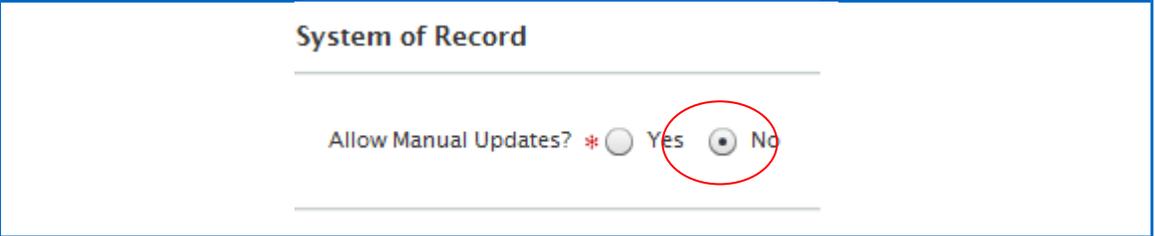
	<b>ADP email communication:</b> No ADP email communication.	
	<b>ADP file frequency:</b> Files sent daily to SHBP.	

## 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 <b>Search</b> .	
3	Choose <b>Member Search</b> 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 <b>Update this employee</b> .	
6	Click <b>System of Record</b> .	
7	<p><b>System of Record</b> must be listed as <b>Yes</b> in order for the account to be updated via the Data Sharing Tool.</p> <p><b>Note:</b> 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>	

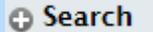
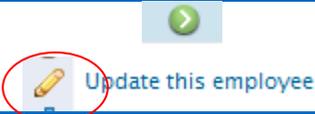
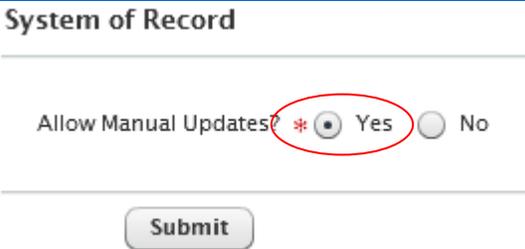
	as well to ensure data is not overwritten.	
8	The <b>Update Subscriber</b> page displays.  Under <b>Tasks</b> , choose <b>Retirement</b> .	
9	Update all required fields (notated by the asterisk) on the <b>Retirement</b> page.  Update Payroll Location and Premium type to appropriate Retiree data points.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

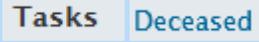
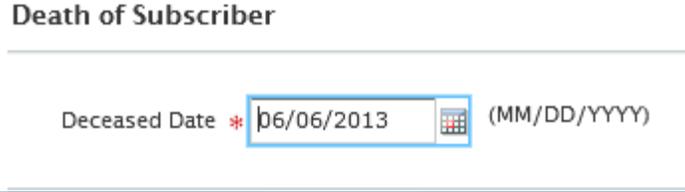
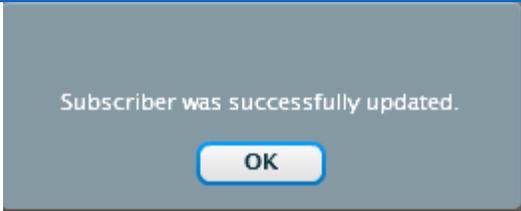
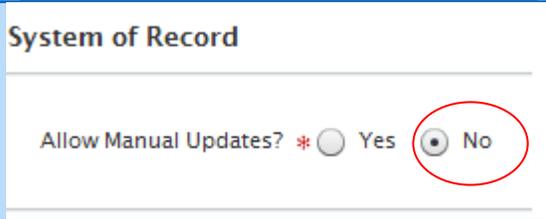
	<b>ADP file frequency:</b> Files sent daily to SHBP.	
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## DATA SHARING TOOL > DECEASED

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.

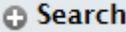
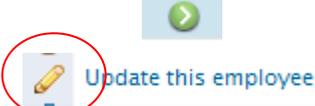
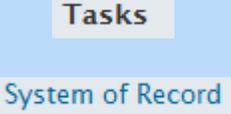
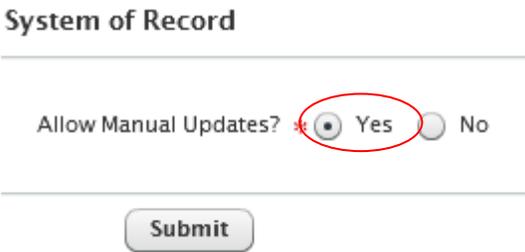
Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click <b>Search</b> .	
3	Choose <b>Member Search</b> from the drop down box.	
4	Enter the appropriate member details.	
5	Next to Member Name, click the green arrow, and click the 'pencil' to <b>Update this employee</b> .	
6	Click <b>System of Record</b> .	
7	<p><b>System of Record</b> must be listed as <b>Yes</b> in order for the account to be updated via the Data Sharing Tool.</p> <p><b>Note:</b> 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	The <b>Update Subscriber</b> page displays. Under <b>Tasks</b> , choose <b>Deceased</b> .	
9	Enter the date of death for the subscriber.	
11	After all required fields are entered, click: <b>Submit</b> .	
12	Confirmation of changes added displays.	
13	After making changes in the Data Sharing Tool, go back to <b>System of Record</b> , and click <b>No</b> to ensure record is locked.  This will set the <b>System of Record</b> back to ' <b>No</b> '.	
	<b>System Timing:</b> After confirmation that the change was added, the Admin can log in online, and view that the status of the member is now deceased.	
	<b>ADP email communication:</b> No ADP email communication.	
	<b>ADP file frequency:</b> Files sent daily to SHBP.	

## 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.

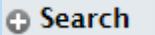
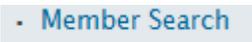
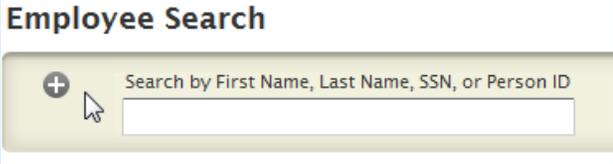
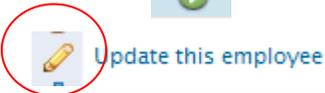
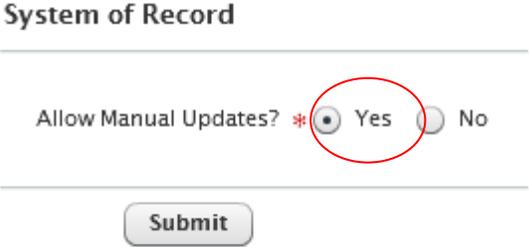
Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click <b>Search</b> .	
3	Choose <b>Member Search</b> from the drop down box.	
4	Enter the appropriate member details.	
5	Next to Member Name, click the green arrow, and choose the ‘pencil’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

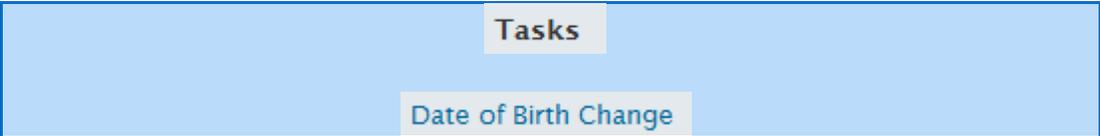
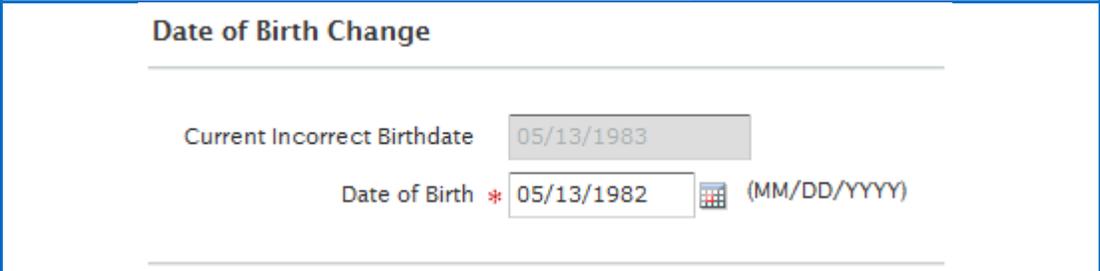
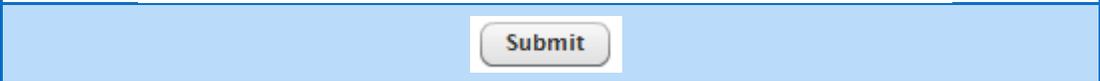
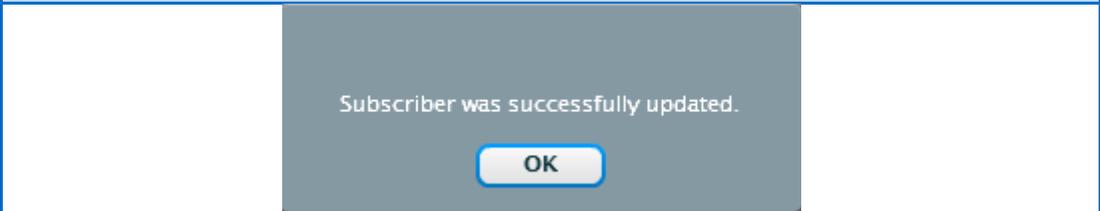
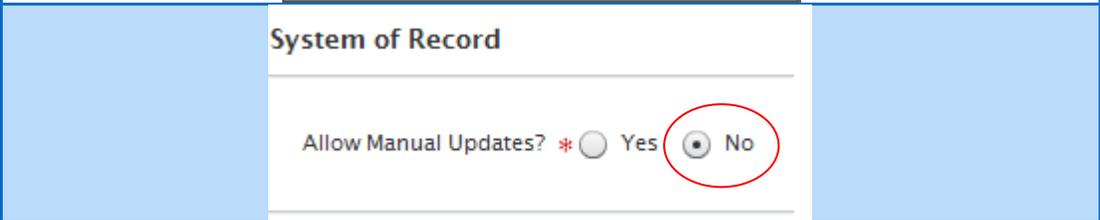
		SSN Change
9	Use the <b>Reveal</b> feature to confirm the Incorrect SSN in the system.  Enter in the correct SSN ( <b>Legal ID</b> ).	<p><b>SSN Change</b></p> <hr/> <p>Current Incorrect Legal ID   XXXXXXXXX   Reveal</p> <p>Legal ID * <input type="text" value="XXXXXXXXX"/>   Reveal</p> <hr/>
10	Verify new SSN submitted is accurate and then choose <b>Submit</b>	Submit
11	Confirmation of change added displays.	<p>Subscriber was successfully updated.</p> <p>OK</p>
12	After making changes in the Data Sharing Tool, go back to <b>System of Record</b> , and click <b>No</b> to ensure record is locked.  This will set the <b>System of Record</b> back to 'No'.	<p><b>System of Record</b></p> <hr/> <p>Allow Manual Updates? * <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <hr/>
	<b>System Timing:</b> After confirmation that the change was added, the member can log online, and view the changes.	
	<b>ADP email communication:</b> No ADP email communication.	
	<b>ADP file frequency:</b> 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 log on process.
2	Click <b>Search</b> .	
3	Choose <b>Member Search</b> 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 <b>Update this employee</b> .	
6	Click <b>System of Record</b> .	
7	<p><b>System of Record</b> must be listed as <b>Yes</b> in order for the account to be updated via the Data Sharing Tool.</p> <p><b>Note:</b> 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>	

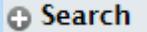
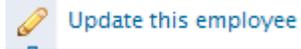
8	Under <b>Tasks</b> , Click <b>Date of Birth Change</b>	
9	Enter in the correct Date of Birth.	
10	Verify new Date of Birth submitted is accurate and then choose <b>Submit</b>	
11	Confirmation of change added displays.	
12	<p>After making changes in the Data Sharing Tool, go back to <b>System of Record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

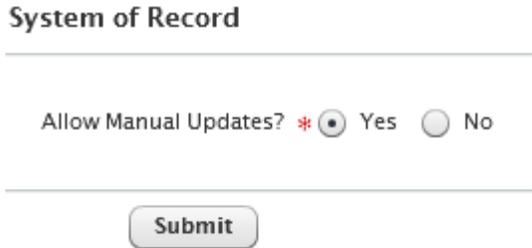
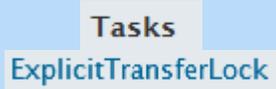
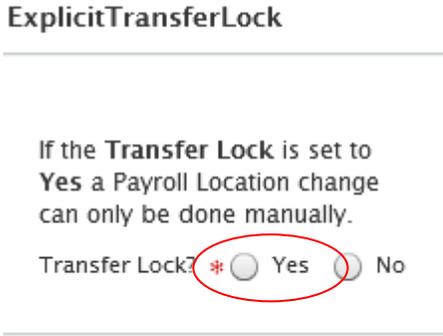
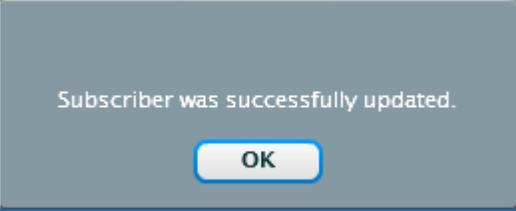
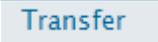
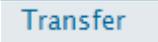
## DATA SHARING TOOL > EXPLICIT TRANSFER LOCK

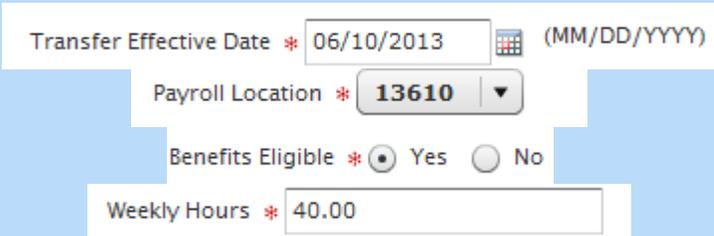
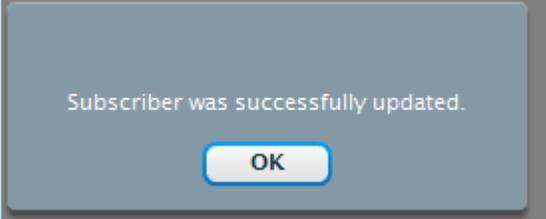
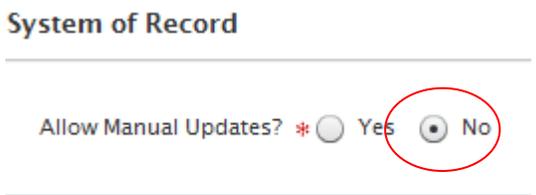
This function will be used only when SHBP needs to explicitly change the Payroll Location of a member. Most changes will be handled by the automated files but there will be instances where this function is needed. For security reasons, Agency Admins will only have access to the members who are currently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

*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.*

Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click <b>Search</b> .	
3	Choose <b>Member Search</b> 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 <b>Update this employee</b> .	 
6	Click <b>System of Record</b> .	

<p><b>7</b></p>	<p><b>System of Record</b> must be listed as <b>Yes</b> in order for the account to be updated via the Data Sharing Tool.</p> <p><b>Note:</b> 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><b>8</b></p>	<p>The <b>Update Subscriber</b> page displays.</p> <p>Under <b>Tasks</b>, choose <b>Explicit Transfer Lock</b>.</p>	
<p><b>9</b></p>	<p>At the prompt, choose <b>Yes</b> to lock the account.</p>	
<p><b>11</b></p>	<p>Click <b>Submit</b>.</p>	
<p><b>12</b></p>	<p>Confirmation of changes added displays.</p>	
<p><b>13</b></p>	<p>Go to <b>Transfer</b> task.</p>	
<p><b>14</b></p>	<p>Click <b>Transfer</b>.</p>	

<p><b>15</b></p>	<p>The following fields must be updated:</p> <ul style="list-style-type: none"> <li>• Effective Date (as date of the transfer)</li> <li>• Payroll Location (verify accuracy)</li> <li>• Benefits Eligible</li> <li>• Weekly Hours</li> </ul> <p><b>Note:</b> The <b>Transfer Effective Date</b> is the date the member joined the new Payroll Location/ Agency.</p>	
<p><b>16</b></p>	<p>Once complete, click <b>Submit</b>.</p>	
<p><b>17</b></p>	<p>Confirmation of the save displays.</p>	
<p><b>18</b></p>	<p>After making changes in the Data Sharing Tool, go back to <b>System of Record</b>, and click <b>No</b> to ensure record is locked.</p> <p>This will set the <b>System of Record</b> back to 'No'.</p>	
	<p><b>System Timing:</b> After confirmation that the change was added, the member can log in online, and view the changes immediately.</p>	
	<p><b>ADP email communication:</b> No ADP email communication.</p>	
	<p><b>ADP file frequency:</b> 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. SHBP Enrollment Portal will never reflect a member on a Leave of Absence status.

**STANDARD EMAIL COMMUNICATIONS > CONFIRMATION**

<b>Distributed to:</b>	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.
<b>Frequency:</b>	Email sent immediately <u>after</u> a member saves an election on the SHBP Enrollment Portal.
<b>Email Text:</b>	<p><b>To:</b> &lt;Employee - Email Address&gt;  <b>From:</b> SHBP Member Services  <b>Subject:</b> 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 <a href="http://mySHBPga.adp.com">mySHBPga.adp.com</a>. Your benefit elections will remain in effect through December 31, &lt;current benefit plan year&gt; 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><b>Important Reminder:</b>  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 <a href="http://www.dch.georgia.gov/shbp">www.dch.georgia.gov/shbp</a>.</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><b>Questions or need more information?</b>  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 <a href="http://www.dch.georgia.gov/shbp">www.dch.georgia.gov/shbp</a>. 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</i></p>

	<p><i>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**

<b>Distributed to:</b>	New Hires
<b>Frequency</b>	Sent immediately when new hire is sent and loaded into the ADP system.
<b>Email Text</b>	<p><b>To:</b> Employee - Email Address  <b>From:</b> SHBP Member Services  <b>Subject:</b> 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 &lt;enrollment window end date&gt;.</p> <p>To enroll in your health benefits, visit the SHBP Enrollment Portal at <a href="http://mySHBPga.adp.com">mySHBPga.adp.com</a>. 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 <b>FINISH</b> when you are done to confirm your election. Your elections will not be saved until you click <b>FINISH</b>. You will receive an email confirmation that your benefits have been submitted.</p> <p><b>Important Reminders:</b>  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 <a href="http://www.dch.georgia.gov/shbp">www.dch.georgia.gov/shbp</a>.</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.

**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](http://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 > NEW RETIREE**

<b>Email Name</b>	<b>New retiree</b>
<b>Distributed to:</b>	Retirees on their retirement start date
<b>Frequency</b>	Sent immediately when Retirement status is sent and loaded into the ADP system.
<b>Email Text</b>	<p><b>To:</b> Employee - Email Address  <b>From:</b> SHBP Member Services  <b>Subject:</b> Review your State Health Benefit Plan (SHBP) coverage</p> <p>Congratulations on your retirement! Now that you have reached your retirement date, you have the opportunity to make changes to your SHBP coverage. As a retiree, you may reduce your coverage tier(s) or discontinue coverage at anytime. However, it is only during the Retiree Option Change Period (ROCP)/Open Enrollment or during a qualifying event that you are able to increase tiers or change options. If you wish to increase tiers or change options, you must do so by &lt;enrollment window end date&gt;.</p> <p>To review or make changes to your health benefits, visit the SHBP Enrollment Portal at <a href="http://mySHBPga.adp.com">mySHBPga.adp.com</a>. 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 <b>FINISH</b> when you are done to confirm your election. Your elections will not be saved until you click <b>FINISH</b>. You will receive an email confirmation that your benefits have been submitted.</p> <p><b>Important Reminders:</b>  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 such as marriage, divorce, or a loss or gain of your spouse's coverage.</p> <p>SHBP requires documentation confirming eligibility of dependents and/or a Qualifying Event, such as a</p>

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](http://www.dch.georgia.gov/shbp).

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.

**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](http://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**

<b>Distributed to:</b>	Actives and retirees turning age 65 or with covered dependent reaching 65
<b>Frequency:</b>	90 days <u>prior</u> to DOB
<b>Email Text:</b>	<p><b>To:</b> Employee - Email Address  <b>From:</b> SHBP Member Services  <b>Subject:</b> 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 &lt;enrollment window end date&gt;.</p> <p>To review or make changes to your health benefits, visit the SHBP Enrollment Portal at <a href="http://mySHBPga.adp.com">mySHBPga.adp.com</a>. 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, click <b>ENROLL NOW</b> and 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 <b>FINISH</b>. You will receive an email confirmation that your benefits have been submitted.</p> <p><b>Important Reminders:</b>  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><b>Questions or need help?</b>  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 forth in the Plan Documents for the State Health Benefit Plan, which are posted on <a href="http://www.dch.georgia.gov/shbp">www.dch.georgia.gov/shbp</a>. 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>

**STANDARD EMAIL COMMUNICATIONS > DEPENDENT AGE OUT CONFIRM/REMINDER**

<b>Distributed to:</b>	Any employee who has a dependent who will age out (turn 26) in 31 days.
<b>Frequency:</b>	Email is sent 31 days <u>prior</u> to event.
<b>Email Text:</b>	<p><b>To:</b> &lt;Employee - Email Address&gt;  <b>From:</b> SHBP Member Services  <b>Subject:</b> 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 <a href="http://dch.georgia.gov/eligibility-forms">http://dch.georgia.gov/eligibility-forms</a> 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 change 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><b>Important Reminder:</b>  For information about eligibility for coverage, please refer to the State Health Benefit Plan Decision Guide and Summary Plan Description available at <a href="http://www.dch.georgia.gov/shbp">www.dch.georgia.gov/shbp</a>.</p> <p><b>Questions or need more information?</b>  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 <a href="http://www.dch.georgia.gov/shbp">www.dch.georgia.gov/shbp</a>. 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>