

SHBP ENROLLMENT PORTAL: ADP USER GUIDE

ADMIN EXPERIENCE (AGENCIES SENDING AUTOMATED FILES DATA SHARING TOOLS)

Rev. 07/11/2013



The screenshot shows the SHBP Enrollment Portal login page. On the left, there is a collage of diverse people. The main content area is blue and contains the SHBP logo, the slogan "MAKING CHOICES that benefit you", and the ADP logo. Below this, it says "Welcome to the SHBP Enrollment Portal" and provides a "Register Here" link for users without a username and password. There are input fields for "User Name" and "Password", with "Forgot User ID?" and "Forgot Your Password?" links next to them. A yellow "LOGIN >" button is positioned below the password field. At the bottom of the main content area, there is a note: "If you are unable to access your account, please contact SHBP Member Services by phone at 800-610-1863." The Georgia Department of Community Health logo is in the bottom right corner of the page. At the very bottom, there is a small line of text regarding system requirements: "A compatible Web Browser and Adobe Flash Player are required to access the SHBP Enrollment Portal. The minimum supported system requirements are Flash v.10; Windows 7, Vista, XP (SP3) using either Internet Explorer 7, 8, or 9, Chrome 23 or 24, FireFox 17.0 or 18.0, or Apple/Mac OSX 10.6 using Safari 6."



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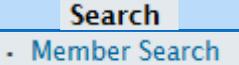
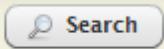
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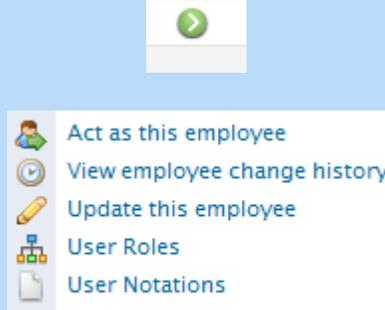
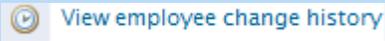
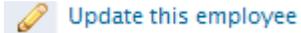
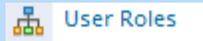
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MEMBER SEARCH

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

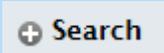
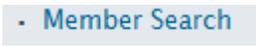
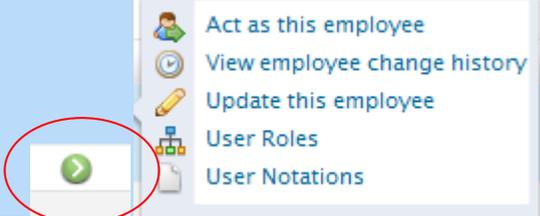
Note: Admins will only have access to the member population their security access has been set to.

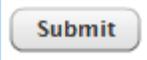
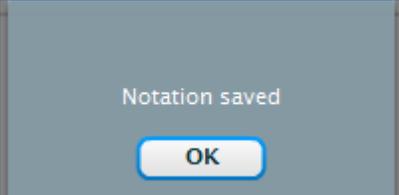
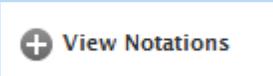
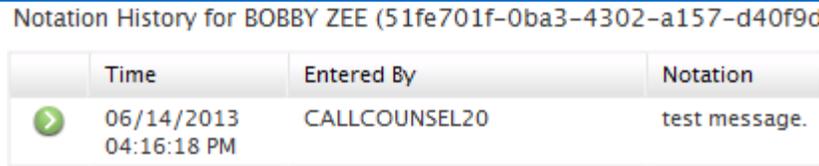
Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click + next to the Search button to expand.	
3	Choose Member Search .	
4	There are two types of search available: <ul style="list-style-type: none"> • Basic Search accepts a full or partial last name (using % as a multi-character wild card, as needed) or a complete Social Security Number (SSN). • Advance Search accepts full or partial first or last names as well as a complete SSN. 	
5	Enter member criteria to search.	
6	Click Search .	
7	The search results will display.	

<p>8</p>	<p>Click the green arrow, and several options will display.</p> <p>Note: User Roles feature will not be seen by all Admins.</p>	
<p>9</p>	<p>Act as this employee returns you to the Welcome page with the notice that you are “Acting as <member name>”. This enables you to:</p> <ul style="list-style-type: none"> - Make elections on behalf of the member - Declare Life Events - Review Current Enrollment and Employee Profile screens 	
<p>10</p>	<p>View employee change history Navigates to the Employee Profile page, from which you can also view the Summary and Timeline pages for this member.</p>	
<p>11</p>	<p>Update this employee Navigates to the Data Sharing Tool which allows updates to add or edit member indicative data.</p>	
<p>12</p>	<p>User Roles 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>13</p>	<p>User Notations, 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.

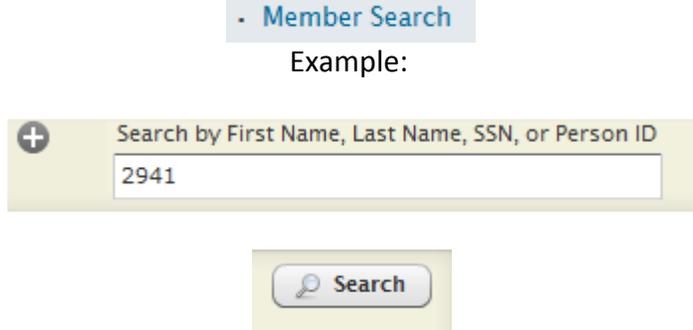
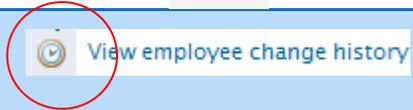
Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click Search .	
3	Choose Member Search from the drop down box.	
4	Enter the appropriate member details.	
7	The search results will display.	
8	Click the green arrow, and several options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

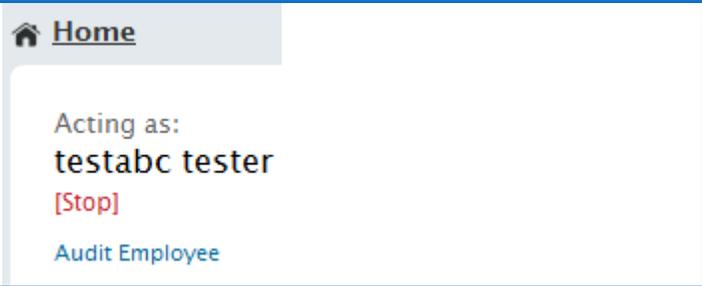
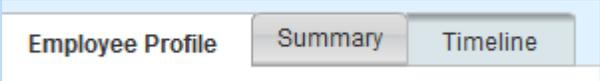
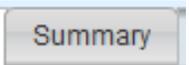
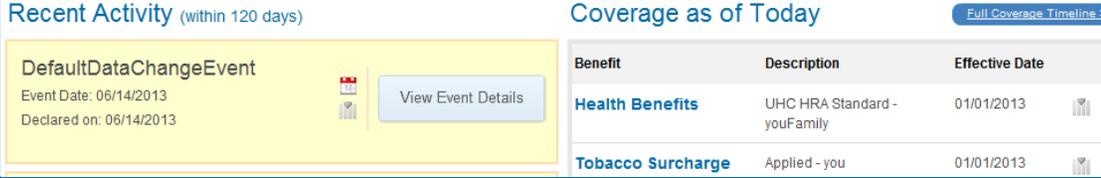
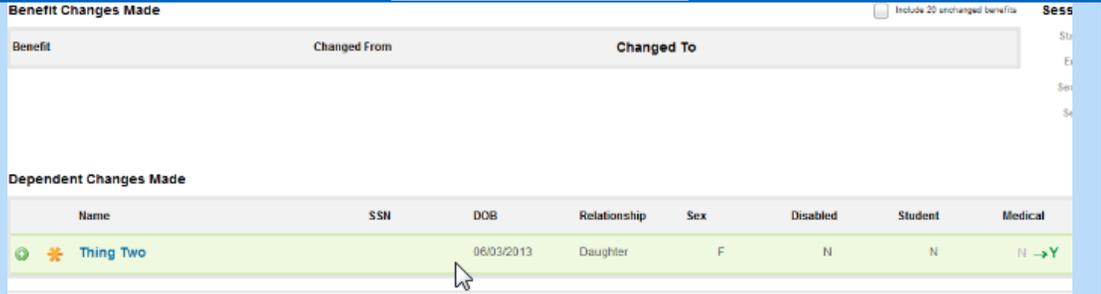
<p>9</p>	<p>Choose User Notations, and enter the notes desired for the member.</p>									
<p>10</p>	<p>Choose Submit to save comments to the system.</p>									
<p>11</p>	<p>Confirmation of saved notation will appear.</p>									
<p>12</p>	<p>To view historical notes in the system, click View Notations, and expand the icon.</p>									
<p>13</p>	<p>Previous notes will display.</p>	 <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.
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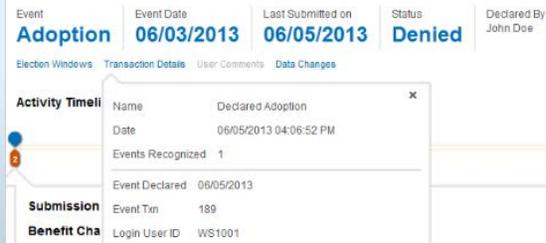
VIEW EMPLOYEE CHANGE HISTORY > AUDIT FEATURE

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 + next to the Search button to expand.									
3	Choose Member Search , and enter the member criteria that you want to review. Click Search .									
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 View employee change history . Click the clock icon, or									

<p>7</p>	<p>Choose Option 2 to View employee change history/Audit</p> <p>On left hand side of the screen, choose Audit Employee.</p>	
<p>8</p>	<p>Regardless of what option is chosen, the first page that displays is Employee Profile.</p> <p>Note: The Employee Profile is also available to the member from the right-hand navigation bar.</p>	
<p>9</p>	<p>Click the Summary tab.</p>	
<p>10</p>	<p>The Summary tab lists recent activity on the left and current benefits and effective dates for the selected member and dependents on the right.</p>	
<p>11</p>	<p>Click View Event Details.</p>	
<p>12</p>	<p>The View Event Details page opens a new page, and drills down to information about the benefit elections related to the event. (e.g., what the member changed <i>from</i> and then changed <i>to</i>)</p>	

<p>13</p>	<p>This page shows all user activity (changes) related to the selected event, even if the user did not complete a benefit election. The colored icons represent the following:</p> <p><i>Red icon</i> — Refers to the number of sessions recorded in the web application, whether or not the election was submitted.</p> <p><i>Blue icon</i> — Refers to activity recorded and then election submitted. This page also includes Data Changes, which shows what benefits were changed by this event, with the change indicated in Before and After columns.</p>	
<p>14</p>	<p>Transaction Details shows what caused the change, such as an event or a file load.</p>	
<p>15</p>	<p>Session Details Shows the amount of time a member is online.</p> <p>Activity reflects Confirmed or Unconfirmed.</p> <p>Confirmed means the member saved their elections.</p>	

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

Show all | Event only x

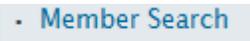
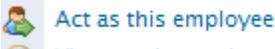
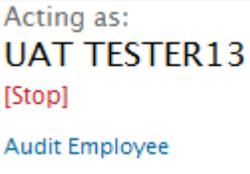
Source	Property	Before	After	Date
Subscriber	benefitEvent	true	false	06/03/2013
Medical - BCB2 - #	dependentCoverage	true	false	06/03/2013
HSA - HSAWAIVE - #	cancelingEvent	DependentBenefitEver		06/03/2013
HSA - HSAWAIVE - #	comment	Defaulted by com. wor	Elected by Subscriber	06/03/2013
HSA - HSAWAIVE - #	enrollingEvent	SubscriberBenefitEver	SubscriberBenefitEver	06/03/2013
HSA - HSAWAIVE - #	enrollmentDate	2013-06-05 14:53:09.9	2013-06-05 16:09:22.4	06/03/2013
HSA - HSAWAIVE - #	electionState	Defaulted	Elected	06/03/2013
Dental - DELTA - #	dependentCoverage	true	false	06/03/2013
SUPADD - SUPADD-4	dependentCoverage	true	false	06/03/2013
Vision - VISION_1C - #	dependentCoverage	true	false	06/03/2013
SUPADD - SUPADD-3	dependentCoverage	true	false	06/03/2013
SUPADD - SUPADD-2	dependentCoverage	true	false	06/03/2013
Medical - BSCCDHP - #	dependentCoverage	true	false	06/03/2013
SUPADD - SUPADD-5	dependentCoverage	true	false	06/03/2013

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.

ADMIN EVENT

While acting as an employee, the HR Admin has access to change enrollment elections (dependent information, Health enrollment).

Important: The Admin Event should be used with caution. Coverage will become effective as the date entered in the event.

Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click Search .	
3	Choose Member Search from the drop down box.	
4	Enter the appropriate member details.	
5	Choose Act as this employee .	
6	Confirm that you are ‘acting’ as the correct member by confirming the information displayed on left-hand side of your screen:	
7	Click Declare Qualifying Event located in the center of the screen.	
8	At Step 1 of 1: Declare Qualifying Event , click Select Qualifying Event .	
9	Choose Admin Event from the drop down box.	

<p>10</p>	<p>Enter in the Event Date.</p> <p>Notes:</p> <ul style="list-style-type: none"> • The Event Date cannot be prior to 1/1/2013 • Best practice is to enter a comment in the additional comment field for historical purposes. 	<div style="text-align: right;"> <p>Event Date: <input type="text"/> </p> </div> <div style="margin-top: 10px;"> <p>Additional comments: <input style="width: 100%;" type="text"/></p> </div>
<p>11</p>	<p>Click Submit.</p>	<div style="text-align: center;"> <input type="button" value="Submit"/> </div>
<p>12</p>	<p>Complete the enrollment as normal.</p> <p>Note: If a dependent is being added under the Admin Event, the dependent will not pend. The system assumes that the dependent will meet dependent verification requirements.</p>	
	<p>ADP email communication: No ADP email communication.</p>	
	<p>ADP file frequency: Files sent daily to SHBP.</p>	

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 Reports .	
3	The final reports to be accessed are still being determined.	

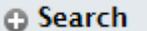
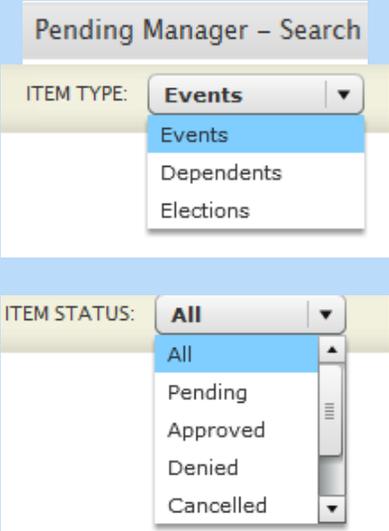
PENDING MANAGER

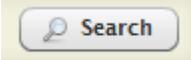
HR Admin users can use Pending Manager search to do the following:

- 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.

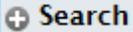
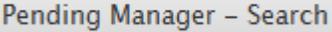
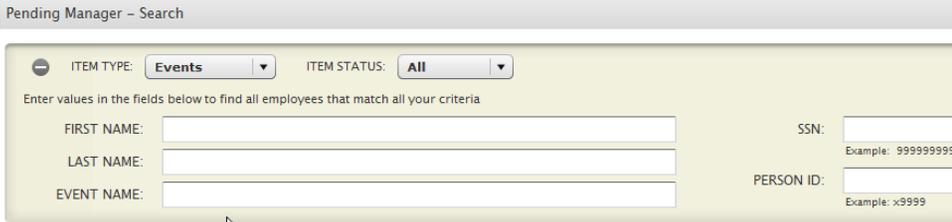
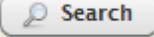
SEARCHING FOR PENDING ACTIVITY VIA STATUS

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

5	After choosing the Item Status , select Search .																									
6	This is an example of Pending Status .	<div data-bbox="926 277 2053 399"> <p>ITEM TYPE: Dependents ITEM STATUS: Pending</p> <table border="1"> <thead> <tr> <th>Subscriber's Name</th> <th>Subscriber's Id</th> <th>Event</th> <th>Dependent's Name</th> <th>Is a Pending Event</th> <th>Pending Elections</th> <th>Expire Date</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>SUBSCRIBER, SALLY</td> <td>908</td> <td>Birth</td> <td>ryder, wiona</td> <td>No</td> <td>1</td> <td>08/20/2013</td> <td>Pending</td> </tr> <tr> <td>SUBSCRIBER, SALLY</td> <td>610</td> <td>Birth</td> <td>subscriber, lulu</td> <td>No</td> <td>1</td> <td>08/20/2013</td> <td>Pending</td> </tr> </tbody> </table> </div>	Subscriber's Name	Subscriber's Id	Event	Dependent's Name	Is a Pending Event	Pending Elections	Expire Date	Status	SUBSCRIBER, SALLY	908	Birth	ryder, wiona	No	1	08/20/2013	Pending	SUBSCRIBER, SALLY	610	Birth	subscriber, lulu	No	1	08/20/2013	Pending
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SUBSCRIBER, SALLY	610	Birth	subscriber, lulu	No	1	08/20/2013	Pending																			
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PENDING MANAGER

SEARCHING FOR PENDING ACTIVITY VIA A SPECIFIC MEMBER

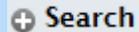
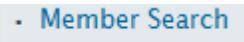
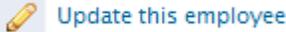
Steps	Process Flow Instructions	Screen Shot																
1	Log on to the SHBP Enrollment Portal.	See the member log on process.																
2	Click Search .																	
3	Select Pending Manager in the drop down box.																	
4	At the Pending Manger- Search screen, choose  .																	
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 Search .																	
7	Search result display on next screen.	<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											

EMPLOYEE INDICATIVE DATA CHANGES: ACTIVE AND RETIRED EMPLOYEE

(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.

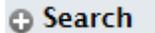
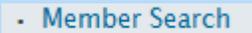
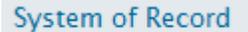
Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click Search .	
3	Choose Member Search from the drop down box.	
4	Enter the appropriate member details.	
5	Choose Update this employee .	
6	On the Update Subscriber screen, choose Personal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

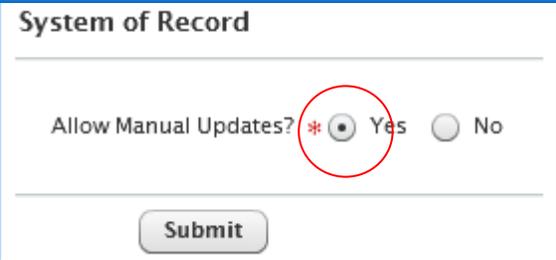
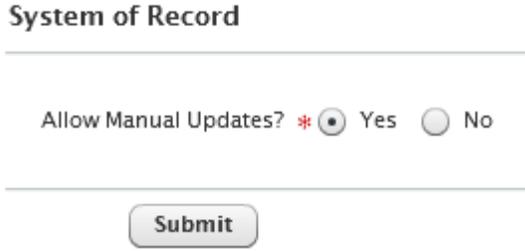
EMPLOYEE INDICATIVE DATA CHANGES: ACTIVE AND RETIRED EMPLOYEES > FOR AGENCIES USING AUTOMATED FILES.

Allows **users with appropriate security level access** to update indicative data (i.e. spelling of name, birth date, address, Social Security Number (SSN) changes) for an active or retired member. **(CRITICAL: Only SHBP Admin User or SHBP IT User)**

Note:

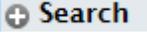
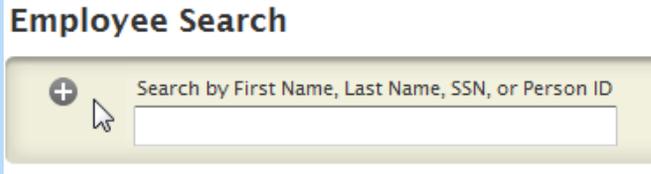
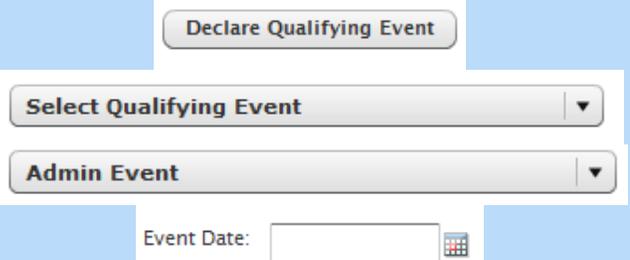
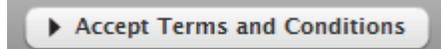
- Agencies who send automated files should continue to make changes via automated files that they do today.
- There may be Admins who can READ the Data Sharing Tool, but cannot WRITE or access to update member data.
- Retirees are able to update their address on their OWN after logging onto the ADP System.

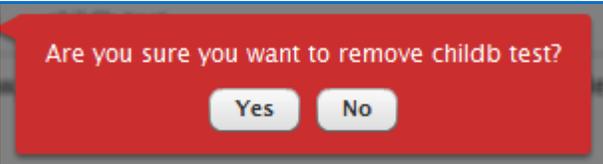
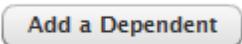
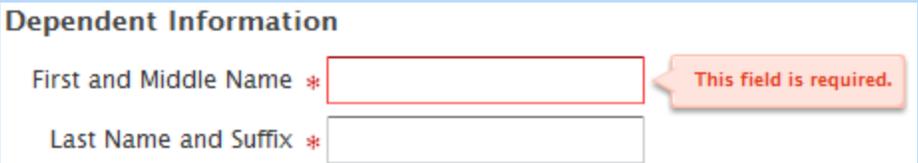
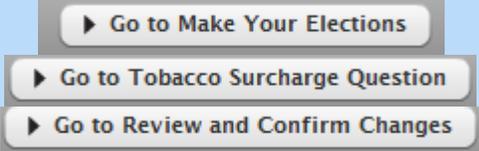
Steps	Process Flow Instructions	Screen Shot
1	Refer agency to follow the normal file process to update member indicative data.	
2	If Data Sharing Tool is the chosen method to update a member’s record, log on to the SHBP Enrollment Portal.	
3	Click Search .	
4	Choose Member Search from the drop down box.	
5	Enter the appropriate member details.	
6	Choose Update the employee .	
7	On the left-hand navigation bar, choose System of Record .	

<p>8</p>	<p>Since the Data Sharing Tool tool is not the system of record, click Yes.</p> <p>This will enable the record to be updated via the Data Sharing Tool.</p>	 <p>System of Record</p> <hr/> <p>Allow Manual Updates? * <input checked="" type="radio"/> Yes <input type="radio"/> No</p> <hr/> <p>Submit</p>
<p>9</p>	<p>Choose Submit.</p>	 <p>Submit</p>
<p>10</p>	<p>On the Update Subscriber screen, choose Personal.</p>	 <p>Personal</p>
<p>11</p>	<p>Enter in appropriate effective date into system using the calendar feature icon.</p> <p>Note: The date cannot be prior to 1/1/13.</p>	 <p>Personal Information</p> <p>Show/Update information as of: 05/29/2013 </p> <hr/>
<p>12</p>	<p>The HR Admin making the update must inform the local Agency to update their normal system of records.</p> <p>CRITICAL: If this is not updated, the data changes will be undone.</p>	
<p>13</p>	<p>Go back to the System of Record and choose No to relock the account.</p> <p>Choose Submit.</p> <p>This will set the System of Record back to be 'not manual'.</p>	 <p>System of Record</p> <hr/> <p>Allow Manual Updates? * <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <hr/> <p>Submit</p>
	<p>ADP email communication: No ADP email communication.</p>	
	<p>ADP file frequency: Update on SHBP Enrollment Portal is immediate.</p>	

DEPENDENT INDICATIVE DATA CHANGE

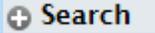
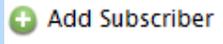
This allows **user with appropriate security level access** to update indicative data (i.e. spelling of name, birth date, SSN changes) on a dependent.

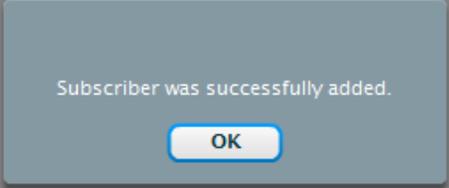
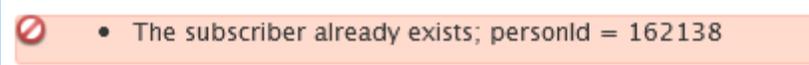
Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click Search .	
3	Choose Member Search from the drop down box.	
4	Enter the appropriate member details.	
5	Choose Act as this employee .	
6	Declare Qualifying Event as an Admin Event and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

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

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

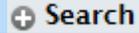
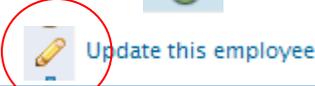
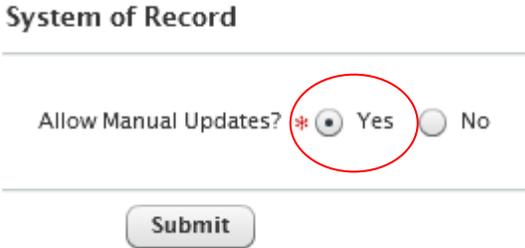
This allows a user with appropriate security level access to enter a new hire directly into the ADP system as opposed to updating the data through an input file. The only type of member that should be entered is an ACTIVE member (no contractors, not retirees).

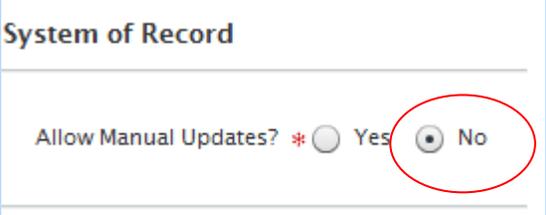
Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click Search .	
3	Choose Member Search from the drop down box.	
4	Enter the appropriate member details.	
5	Search for the member to ensure their employment data is not already in the SHBP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

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

DATA SHARING TOOL > DATA SHARING TOOL > SYSTEM OF RECORD

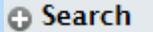
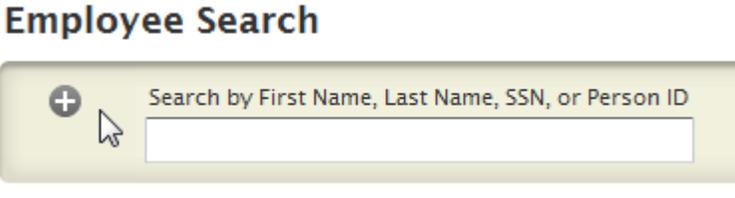
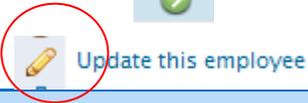
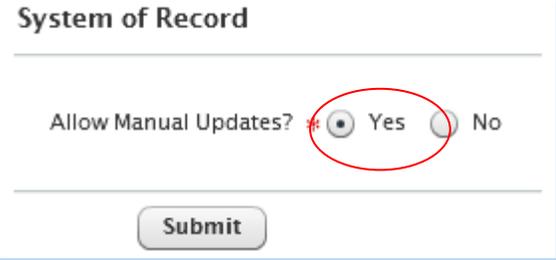
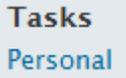
This allows an Admin the ability to update a member record via the Data Sharing Tool.

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

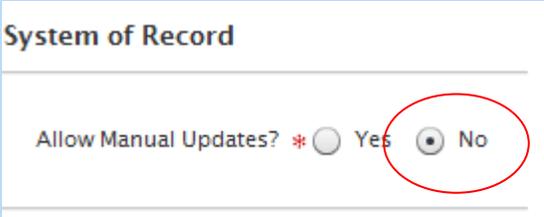
<p>8</p>	<p>After making changes in the Data Sharing Tool, go back to System of Record, and click No to ensure record is locked.</p> <p>This will set the system of record back to be 'not manual'.</p>	 <p>The screenshot shows a section titled "System of Record". Below the title is a horizontal line. Underneath, 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, SSN, birth date, gender, Payroll Location and address.)

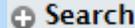
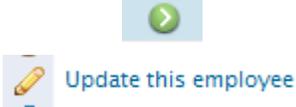
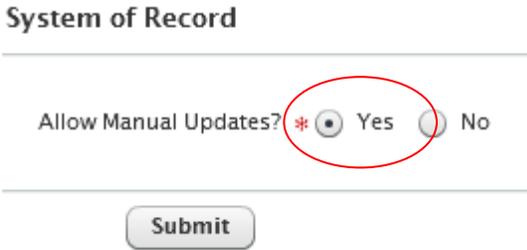
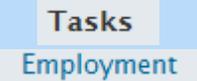
Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click Search .	
3	Choose Member Search from the drop down box.	
4	Enter the appropriate member details.	
5	Next to Member Name, click the green arrow, and choose the 'pencil' to Update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

<p>8</p>	<p>Enter the effective date of the change.</p> <p>Note: Typically, this is the date of hire or date of marriage, for example.</p>	<div data-bbox="1213 215 1824 326"> <p>Personal Information</p> <p>Show/Update information as of: <input type="text" value="05/30/2013"/> </p> </div>
<p>9</p>	<p>Update the desired personal indicative data changes.</p> <p>Grandfather Question must be answered. The definition of Grandfather means that a member is ‘automatically’ benefits eligible, and does not look at DOH or location to determine eligibility.</p> <p>Note: <i>DOB and SSN changes will be a separate task in the future.</i></p> <p>Note:</p> <ul style="list-style-type: none"> Depending on the field type, select text from a drop down list or select from the data picker. Benefit eligibility rules are enforced by the ADP system. To minimize any member impact for enrollment opportunity, ensure the accuracy of data entry. 	<div data-bbox="1276 532 1745 824"> <p>Example:</p> <p>First Name * <input type="text" value="TESTER"/></p> <p>Last Name * <input type="text" value="TESTER"/></p> <p>Grandfathered * <input checked="" type="radio"/> Yes <input type="radio"/> No</p> </div>
<p>10</p>	<p>After all required fields are entered click:, Submit.</p>	<div data-bbox="1444 1019 1591 1075"> <p>Submit</p> </div>
<p>11</p>	<p>Confirmation of changes added displays.</p>	<div data-bbox="1262 1084 1770 1294"> <p>Subscriber was successfully added.</p> <p>OK</p> </div>

<p>12</p>	<p>After making changes in the Data Sharing Tool, go back to System of Record, and click No to ensure record is locked.</p> <p>This will set the system of record back to be 'not manual'.</p>	 <p>The screenshot shows a white box titled "System of Record". Below the title is a horizontal line. Underneath, the text "Allow Manual Updates? *" is followed by two radio buttons. The "Yes" radio button is unselected, and the "No" radio button is selected and circled in red.</p>
	<p>System Timing: After confirmation that the change was added, the member can log in online and view the changes.</p>	
	<p>ADP email communication: No ADP email communication.</p>	
	<p>ADP file frequency: Files sent daily to SHBP.</p>	

DATA SHARING TOOL > 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)

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

<p>9</p>	<p>Enter the effective date of the change.</p> <p>Note: Typically this is the date of hire or date of marriage, for example.</p>	<p>Employment Information</p> <p>Show/Update information as of: <input type="text" value="05/30/2013"/> </p>
<p>10</p>	<p>Update the desired employment data changes.</p> <ul style="list-style-type: none"> • Weekly compensation • Hours • Premium Type for Retirees <p>Note:</p> <ul style="list-style-type: none"> • Depending on the field type, select text from a drop down list or select from the data picker. • Hire Date and Original Hire Date functionality may be revised; these items will only be visible. 	<p>Example:</p> <div style="border: 1px solid #ccc; padding: 10px; width: fit-content; margin: auto;"> <p>Weekly Hours * <input type="text" value="40.00"/></p> <p>Monthly Compensation Amount * <input type="text" value="500.00"/></p> </div>
<p>11</p>	<p>After all required fields are entered, click: Submit.</p>	<p style="text-align: center;"><input type="button" value="Submit"/></p>
<p>12</p>	<p>Confirmation of changes added displays.</p>	<p style="text-align: center; background-color: #d3d3d3; padding: 10px;">Subscriber was successfully updated.</p> <p style="text-align: center;"><input type="button" value="OK"/></p>
<p>13</p>	<p>After making changes in the Data Sharing Tool, go back to System of Record, and click No to ensure record is locked.</p> <p>This will set the System of Record back to be 'not manual'.</p>	<p>System of Record</p> <hr/> <p>Allow Manual Updates? * <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <hr/>

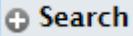
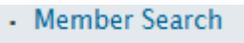
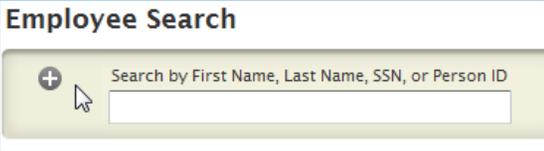
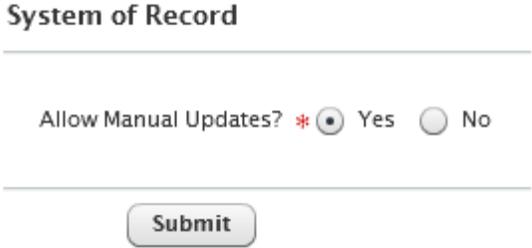
	System Timing: After confirmation that the change was added, the member can log in online and view the changes.	
	ADP email communication: No ADP email communication.	
	ADP file frequency: Files sent daily to SHBP.	

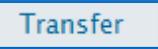
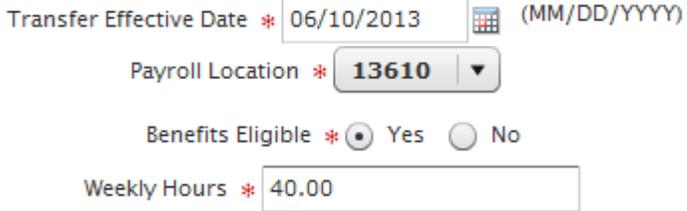
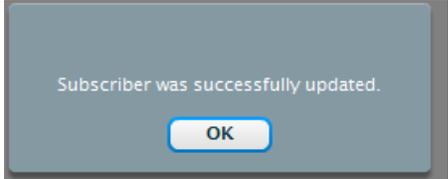
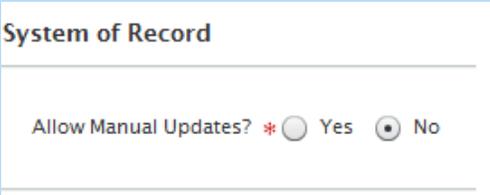
DATA SHARING TOOL > TRANSFER

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:

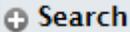
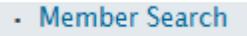
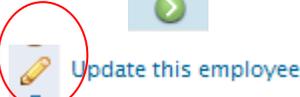
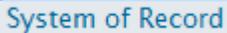
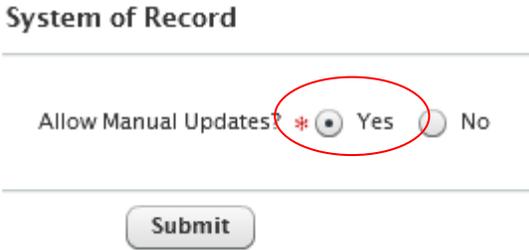
- Agency Admins will only be able to process transfers on members they have security access to see. Due to the security restriction, most of the use of transfer function could be from the SHBP Staff.
- If the member’s hire date is greater than the previous hire date, and the agency sends a file, the Data Sharing Tool should not be used.

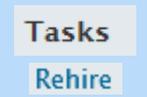
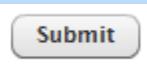
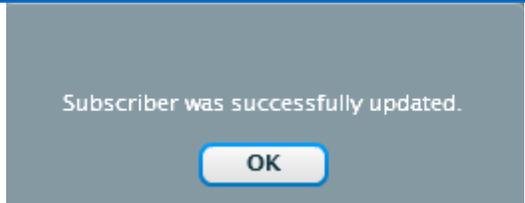
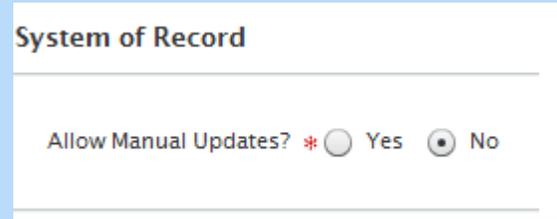
Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click Search .	
3	Choose Member Search from the drop down box.	
4	Enter the appropriate member details.	
5	Next to Member Name, click the green arrow, and choose the ‘pencil’ to update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

8	Click Transfer .	
9	<p>The following fields must be updated:</p> <ul style="list-style-type: none"> • Effective Date (as date of the transfer) • Payroll Location (verify accuracy) • Benefits Eligible • Weekly Hours <p>Note: The transfer effective date is the date the member joined the new Payroll Location/ Agency.</p>	
10	Once complete, click Submit .	
11	Confirmation of the save displays.	
12	<p>After making changes in the Data Sharing Tool, go back to System of Record, and click No to ensure record is locked.</p> <p>This will set the system of record back to be 'not manual'.</p>	
	<p>System Timing: After confirmation that the change was added, the system will recalculate benefits and rates. The member can log in online, and view the changes immediately.</p>	
	<p>ADP email communication: No ADP email communication.</p>	
	<p>ADP file frequency: Files sent daily to SHBP.</p>	

DATA SHARING TOOL > REHIRE

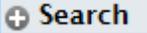
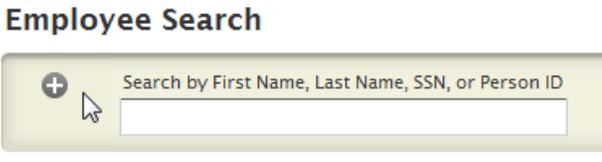
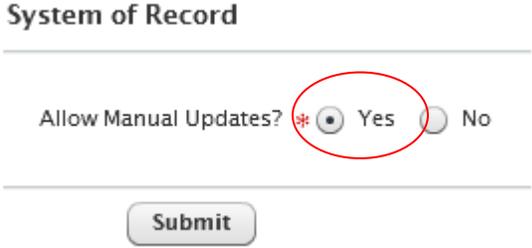
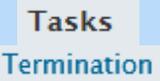
This allows a user with appropriate security level access to update specific Rehire data for Members.

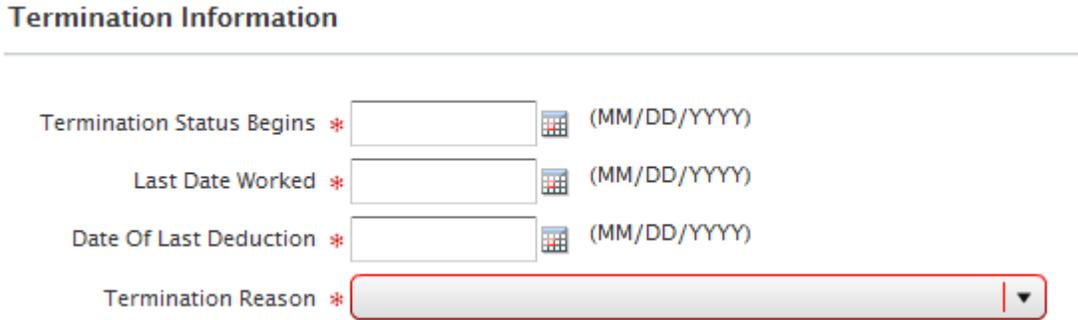
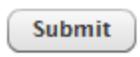
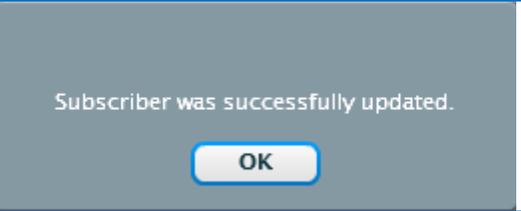
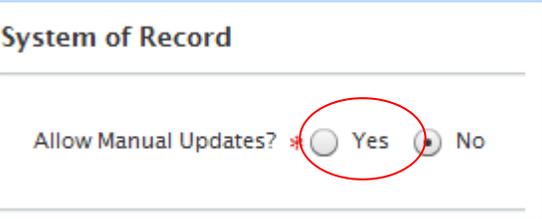
Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click Search .	
3	Choose Member Search from the drop down box.	
4	Enter the appropriate member details.	
5	Next to Member Name, click the green arrow, and choose the 'pencil' to Update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

<p>8</p>	<p>The Update Subscriber page displays.</p> <p>Under Tasks, choose Rehire.</p>	
<p>9</p>	<p>On the Rehire Information screen, enter the rehire date in the Adjusted Hire Date field.</p>	
<p>11</p>	<p>After all required fields are entered, click Submit.</p>	
<p>12</p>	<p>Confirmation of the changes added displays.</p>	
<p>13</p>	<p>After making changes in the Data Sharing Tool, go back to System of Record, and click No to ensure record is locked.</p> <p>This will set the system of record back to be 'not manual'.</p>	
	<p>System Timing: After confirmation that the change was added, the member can log online, and view the changes.</p>	
	<p>ADP email communication: No ADP email communication.</p>	
	<p>ADP file frequency: Files sent daily to SHBP.</p>	

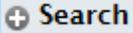
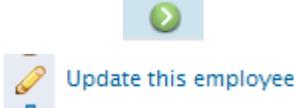
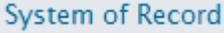
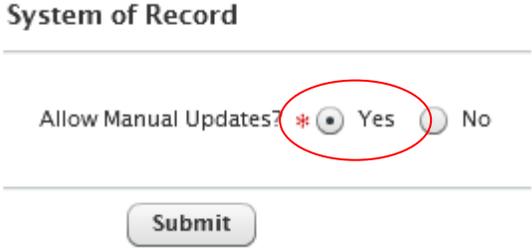
DATA SHARING TOOL > TERMINATION

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

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

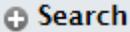
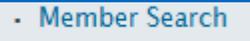
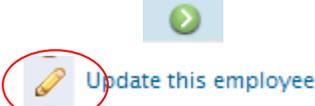
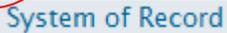
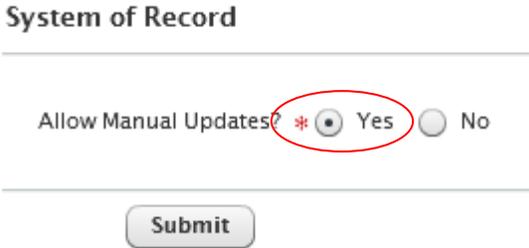
<p>9</p>	<p>On the Termination Information screen, enter the Termination date and the coverage end date. Select the Termination Reason from the drop down box.</p> <p>Term Date = the first day no longer employed. Last day worked = Last day working</p> <p>Note: A voluntary piece will be added and defaulted to YES.</p>	 <p>Termination Information</p> <p>Termination Status Begins * <input type="text"/> (MM/DD/YYYY)</p> <p>Last Date Worked * <input type="text"/> (MM/DD/YYYY)</p> <p>Date Of Last Deduction * <input type="text"/> (MM/DD/YYYY)</p> <p>Termination Reason * <input type="text"/></p>
<p>11</p>	<p>After all required fields are entered, click: Submit.</p>	
<p>12</p>	<p>Confirmation of changes added displays.</p>	 <p>Subscriber was successfully updated.</p> <p>OK</p>
<p>13</p>	<p>After making changes in the Data Sharing Tool, go back to System of Record, and click No to ensure record is locked.</p> <p>This will set the System of Record back to be 'not manual'.</p>	 <p>System of Record</p> <p>Allow Manual Updates? * <input checked="" type="radio"/> Yes <input type="radio"/> No</p>
	<p>System Timing: After confirmation that the change was added, the Admin can log online, and view the changes.</p>	
	<p>ADP email communication: No ADP email communication.</p>	
	<p>ADP file frequency: Files sent daily to SHBP.</p>	

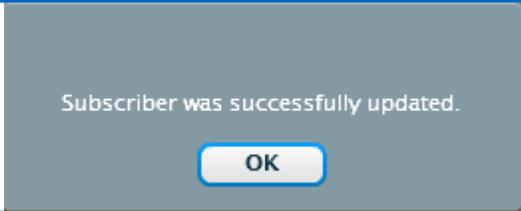
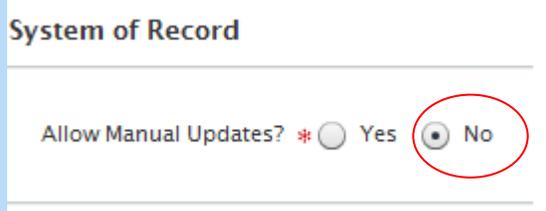
DATA SHARING TOOL > RETIREMENT

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

DATA SHARING TOOL > DECEASED

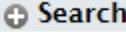
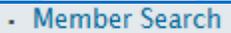
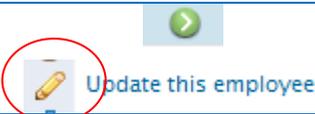
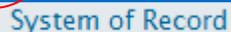
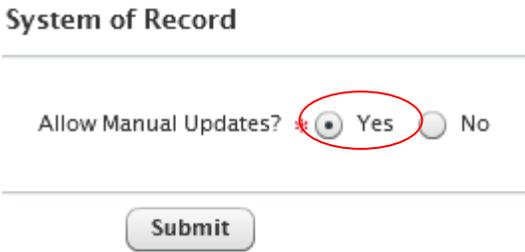
This allows a user with appropriate security level access to update specific death data for members.

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

<p>9</p>	<p>Enter the date of death for the subscriber.</p>	 <p>Death of Subscriber</p> <hr/> <p>Deceased Date * <input type="text" value="06/06/2013"/> (MM/DD/YYYY)</p>
<p>11</p>	<p>After all required fields are entered, click: Submit.</p>	
<p>12</p>	<p>Confirmation of changes added displays.</p>	 <p>Subscriber was successfully updated.</p> <p>OK</p>
<p>13</p>	<p>After making changes in the Data Sharing Tool, go back to System of Record, and click No to ensure record is locked.</p> <p>This will set the System of Record back to be 'not manual'.</p>	 <p>System of Record</p> <hr/> <p>Allow Manual Updates? * <input type="radio"/> Yes <input checked="" type="radio"/> No</p>
	<p>System Timing: After confirmation that the change was added, the Admin can log in online, and view that the status of the member is now deceased.</p>	
	<p>ADP email communication: No ADP email communication.</p>	
	<p>ADP file frequency: Files sent daily to SHBP.</p>	

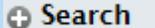
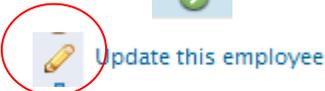
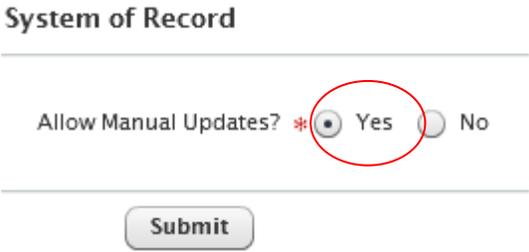
DATA SHARING TOOL > SSN CHANGE > PLACEHOLDER.

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

Steps	Process Flow Instructions	Screen Shot
1	Log on to the SHBP Enrollment Portal.	See the member log on process.
2	Click Search .	
3	Choose Member Search from the drop down box.	
4	Enter the appropriate member details.	
5	Next to Member Name, click the green arrow, and choose the ‘pencil’ to Update this employee .	
6	Click System of Record .	
7	<p>System of Record must be listed as Yes in order for the account to be updated via the Data Sharing Tool.</p> <p>Note: If the Data Sharing Tool is used on an escalated situation, and the member is normally sent on a file, the regular system that is used to update SHBP must be updated as well to ensure data is not overwritten.</p>	
	System Timing: After confirmation that the change was added, the member can log online, and view the changes.	
	ADP email communication: No ADP email communication.	
	ADP file frequency: Files sent daily to SHBP.	

DATA SHARING TOOL > DATE OF BIRTH CHANGE > PLACEHOLDER.

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

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

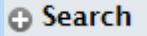
	ADP email communication: No ADP email communication.	
	ADP file frequency: Files sent daily to SHBP.	

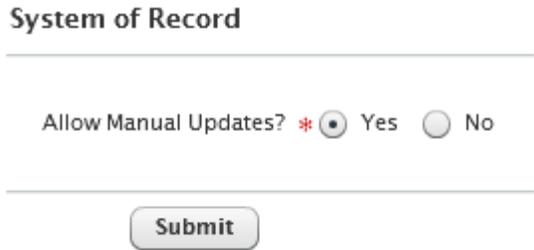
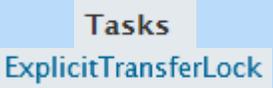
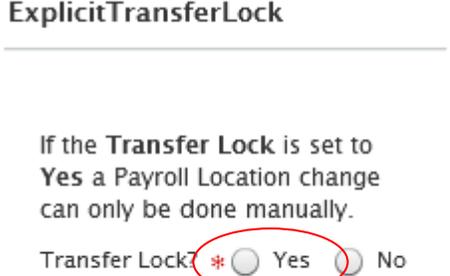
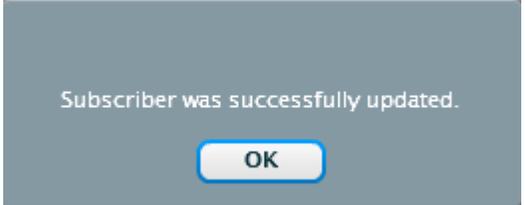
DATA SHARING TOOL > EXPLICIT TRANSFER LOCK

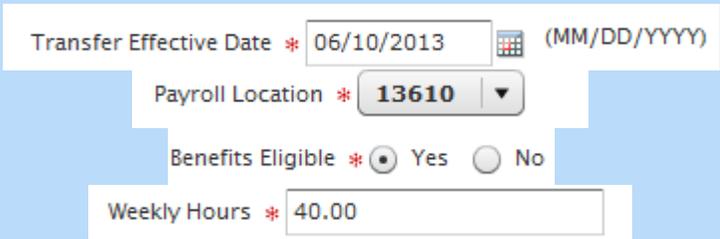
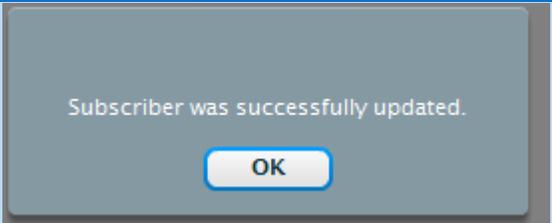
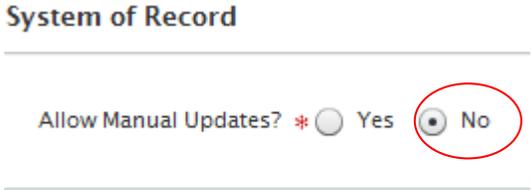
This function will be used only when SHBP needs to explicitly change the Payroll Location of a member. Most changes will be handled by the automated files but there will be instances where this function is needed. For security reasons, Agency Admins will only have access to the members who are currently 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 Search .	
3	Choose Member Search from the drop down box.	
4	Enter the appropriate member details.	
5	Next to Member Name, click the green arrow, and click the 'pencil' to Update this employee .	 
6	Click System of Record .	

<p>7</p>	<p>System of Record must be listed as Yes in order for the account to be updated via the Data Sharing Tool.</p> <p>Note: If the Data Sharing Tool is used on an escalated situation, and the member is normally sent on a file, the regular system that is used to update SHBP must be updated as well to ensure data is not overwritten.</p>	
<p>8</p>	<p>The Update Subscriber page displays.</p> <p>Under Tasks, choose Explicit Transfer Lock.</p>	
<p>9</p>	<p>At the prompt, choose Yes to lock the account.</p>	
<p>11</p>	<p>Click Submit.</p>	
<p>12</p>	<p>Confirmation of changes added displays.</p>	
<p>13</p>	<p>Go to Transfer task.</p>	
<p>14</p>	<p>Click Transfer.</p>	

<p>15</p>	<p>The following fields must be updated:</p> <ul style="list-style-type: none"> • Effective Date (as date of the transfer) • Payroll Location (verify accuracy) • Benefits Eligible • Weekly Hours <p>Note: The Transfer Effective Date is the date the member joined the new Payroll Location/ Agency.</p>	
<p>16</p>	<p>Once complete, click Submit.</p>	
<p>17</p>	<p>Confirmation of the save displays.</p>	
<p>18</p>	<p>After making changes in the Data Sharing Tool, go back to System of Record, and click No to ensure record is locked.</p> <p>This will set the System of Record back to be 'not manual'.</p>	
	<p>System Timing: After confirmation that the change was added, the member can log in online, and view the changes immediately.</p>	
	<p>ADP email communication: No ADP email communication.</p>	
	<p>ADP file frequency: Files sent daily to SHBP.</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.