Navigating eBenefits

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

Introduction

eBenefits is an enrollment management system that members can use to enroll in their health benefits as a new employee or for Open Enrollment.

Health Benefit Representatives (HBRs) can also use eBenefits to manage and review members' benefits by hiring, terminating, task management and research.

This module provides a high-level overview of how to navigate through some eBenefits functions.

HBRs may contact the HBR Support Center at 800-422-5249 when needing assistance with eBenefits.

Navigating the System

After signing into eBenefits you will come to the HOME page. Some of the navigation elements you may access from the HOME page are:
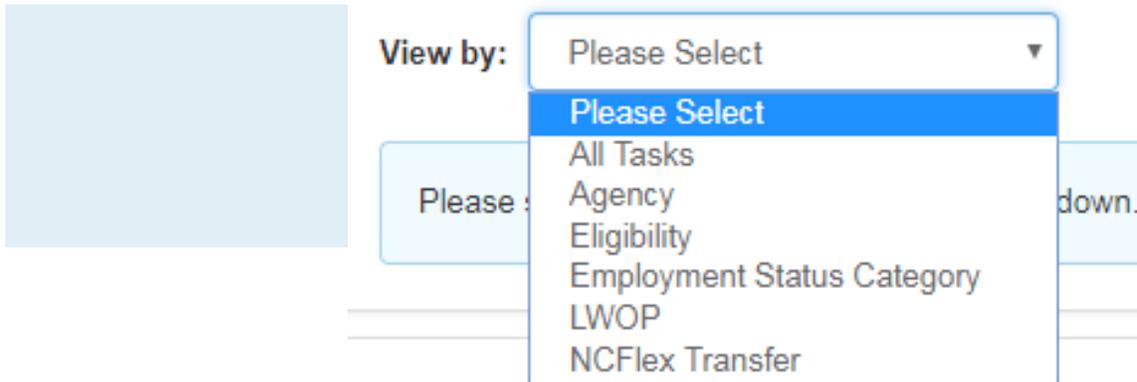
- Manage Employees (TO-DO LIST)

- Search for Employees (SEARCH BAR)

- Create Report (DATA & REPORTING TAB)

- Review Cases (CASE MANAGEMENT TAB)

- Compose Messages to Employees (MESSAGES TAB)

Managing the To-Do List

Use the TO-DO LIST to keep track of employee activity.

You can filter the categories of employees that display in your TO-DO LIST.

To-do list

View by: | Please Select ▼

Please Select
All Tasks
Agency
Eligibility
Employment Status Category
LWOP
NCFlex Transfer

Please ... down.

TIP: Depending on the settings for your Employing Unit you may see different options than what is presented in the screen shot.

NOTE: For large employer groups, no tasks will display by default. You will need to select an option from the VIEW BY drop-down box to display all tasks or specific categories of employees.

Managing the To-Do List

The TO-DO LIST has different types of data related to your employees, such as items that need to be approved, incomplete information and benefit elections that have not been started.

- These items are separated into sections (including current benefits, Open Enrollment benefits, work-related information, personal data and so on).

- The number in front of each link indicates how many employees need attention, see example.

- When you select a link, you are taken to the list of associated employees for that item.

Number of Employees that need attention

Viewing Benefit Enrollment

Show the number of employees enrolled in benefits by looking at the charts at the bottom of the Home page in the BENEFIT PARTICIPATION section. Select plan year and benefit type from the drop-down menus.

Hover over the chart to see the number of employees enrolled in each plan.
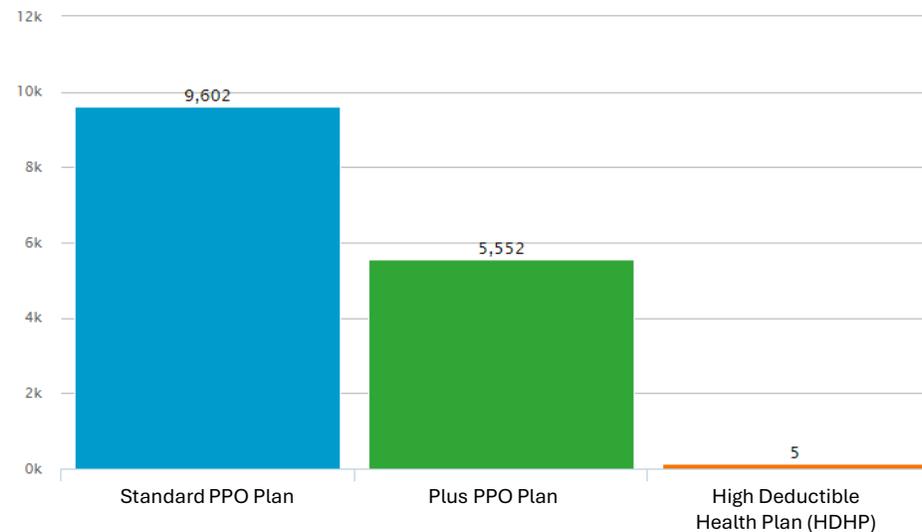
Viewing Benefit Enrollment: Under 1,000 Enrollees

Click on the chart to see the list of employees enrolled in that plan if UNDER 1,000 ENROLLEES.

Viewing Benefit Enrollment: Over 1,000 Enrollees

If MORE THAN 1,000 ENROLLEES, you will receive 3 OPTIONS to choose from:

- Send a message to all
- Export to CSV
- Run a Benefit Detail Report to see enrollment details for all plans

Comparing Benefit Plan Counts

The BENFIT PARTICIPATION widget includes the option to compare enrollment counts across plan years. To do so, select the ADD ANOTHER TO COMPARE button, and then select an additional plan year.

As a result, the BENFIT PARTICIPATION widget displays two employee counts for each plan: one for the initial plan year selected and another for the second plan year selected.


Select the desired plan year

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

Using Navigation Tabs

The NAVIGATION BAR on the left portion of the screen includes tabs that allow you to dive deeper into the system. Your access to certain tabs may vary depending on your account permissions.

These navigation elements display on every tab within the system, allowing you quick access to information without having to perform extensive searches to find it.
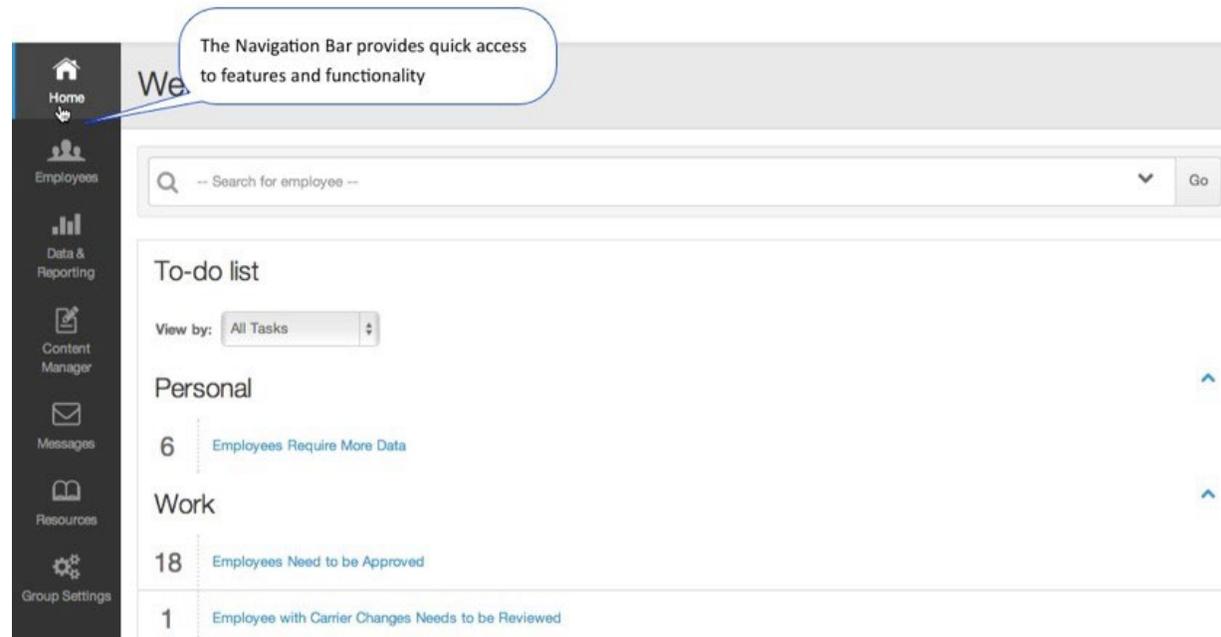
Searching for Employees

You can search for employees by entering a name or Social Security number in the search bar in the top, right corner of any screen or above the TO-DO LIST on the HOME page.
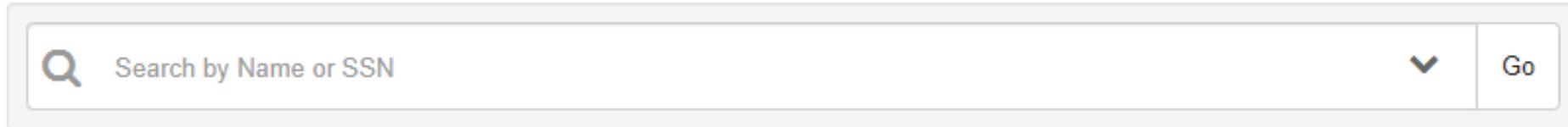
You can add additional criteria for a more complex search by selecting the EMPLOYEES TAB in the NAVIGATION BAR. Complete the steps on the next slide to perform a simple search.

Steps to Perform a Search

1. Enter the first few characters or the full criteria in the search field
   (example: *smi* or *smith* for a NAME Search). The search is not case sensitive.

2. Select GO or press ENTER. The EMPLOYEE SEARCH RESULTS page provides you with a list of employees who meet the criteria entered in the search field.

3. To open a record, select the employee's name from the list.

4. You can also see other items by selecting the ACTIONS icon next to the employee's SSN.
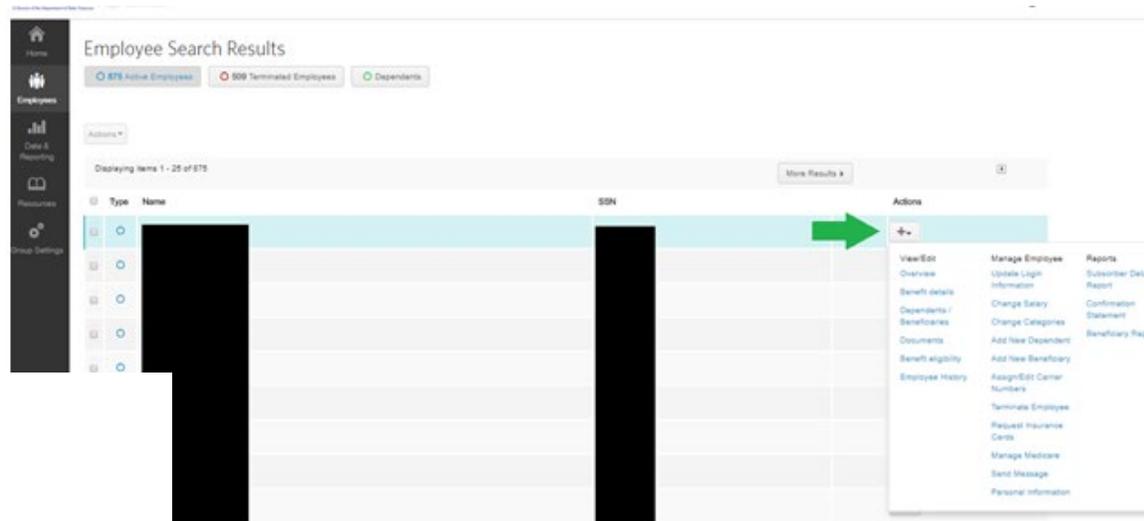
NOTE: If the system finds an exact match when you search by last name or Social Security number (SSN), you are taken directly to the employee's OVERVIEW tab.

Create a Report

HBRs can create reports from eBenefits from the DATA AND REPORTING tab.

History of Changes Overview

The HISTORY OF CHANGES will help you to identify when and how a change was made to an employee's profile in eBenefits.

After searching for and selecting an employee in eBenefits, select Employee History, then VIEW in History of Changes.

History of Changes Key Identifiers

BATCHUSER

- Mass job that was completed by Benefitfocus

BFPAYROLL

- Applicable for Payroll File groups only
- Change was made by the inbound payroll file

DATASYNC

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

BFXXXXXX

- Either a Benefitfocus Account Manager or someone from the call center making a change

SHPXXXXX

- State Health Plan made a change

How to search History of Changes

Start and End Date fields will be available for modification in order to get the full picture of the changes

CTRL + F on keyboard to search for key words

Example: Searching DUE TO will bring you to QLEs that have been keyed.

Changes, Approvals, Timing, and Denials

Changes that prompt a task must be approved in order for the change to send to the appropriate vendors.

File transmissions to and from Benefitfocus follow a daily schedule.

EXAMPLE:

- Employee enters a QLE of Birth and adds a newborn to benefits on Monday morning
- HBR approves the pending task 5:05 PM on Wednesday.
- The change will not send to appropriate vendors until Thursday.