



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](tel: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:

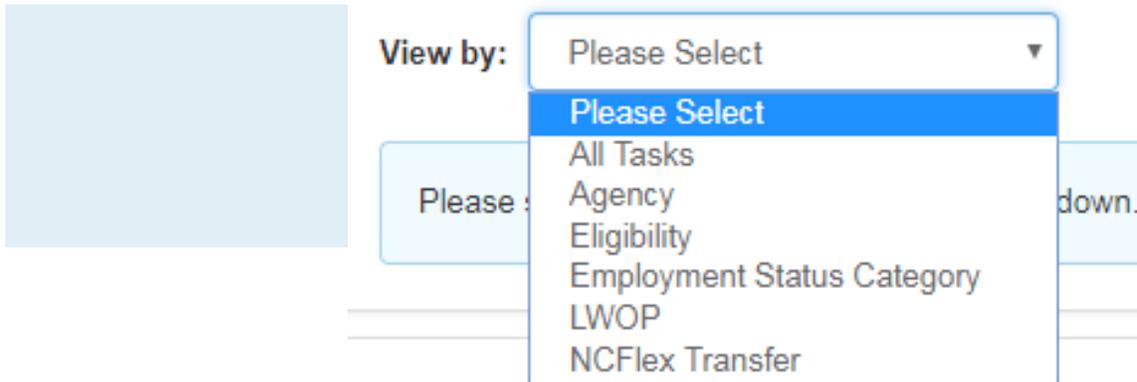
- Manage Employees ([TO-DO LIST](#))
- Search for Employees ([SEARCH BAR](#))
- Create Report ([DATA & REPORTING TAB](#))
- Review Cases ([CASE MANAGEMENT TAB](#))
- Compose Messages to Employees ([MESSAGES TAB](#))

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



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

Personal	
7	Employees Need to be Approved
Work	
14	Employees Need to be Approved
110	Employees and/or Dependents with Invalid Data
Current Benefits	
View by offer >	
15	Employees Need to be Approved
91	Employees and/or Dependents with Invalid Data
Open Enrollment Benefits	
View by offer >	
2	Employees Need to be Approved
Benefits not started	
Enrollment period	3 selected
Benefit offer	32 selected
Go	
11	Employees whose enrollment period has passed
1	Employees with 1 to 5 days left to enroll
27	Employees with 6 or more days left to enroll
Dependent Information	
17	Employees Missing Dependent Verification

Viewing Benefit Enrollment

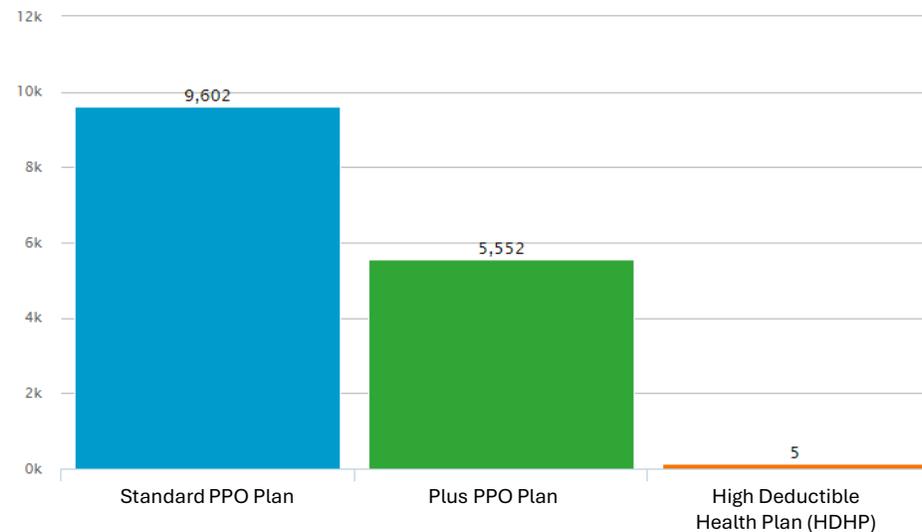
Show the number of employees enrolled in benefits by looking at the charts at the bottom of the Home page in the **BENEFIT PARTICIPATION** section. Select plan year and benefit type from the drop-down menus.

Hover over the chart to see the number of employees enrolled in each plan.

Benefit Participation

01/01/2020 - 12/31/2020 ▾
Medical ▾

} Drop-down menus



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**.

Employees Add a new employ

Employee Search Results

[241 Active Employees](#) [140 Terminated Employees](#) [Dependents](#)

Actions ▾

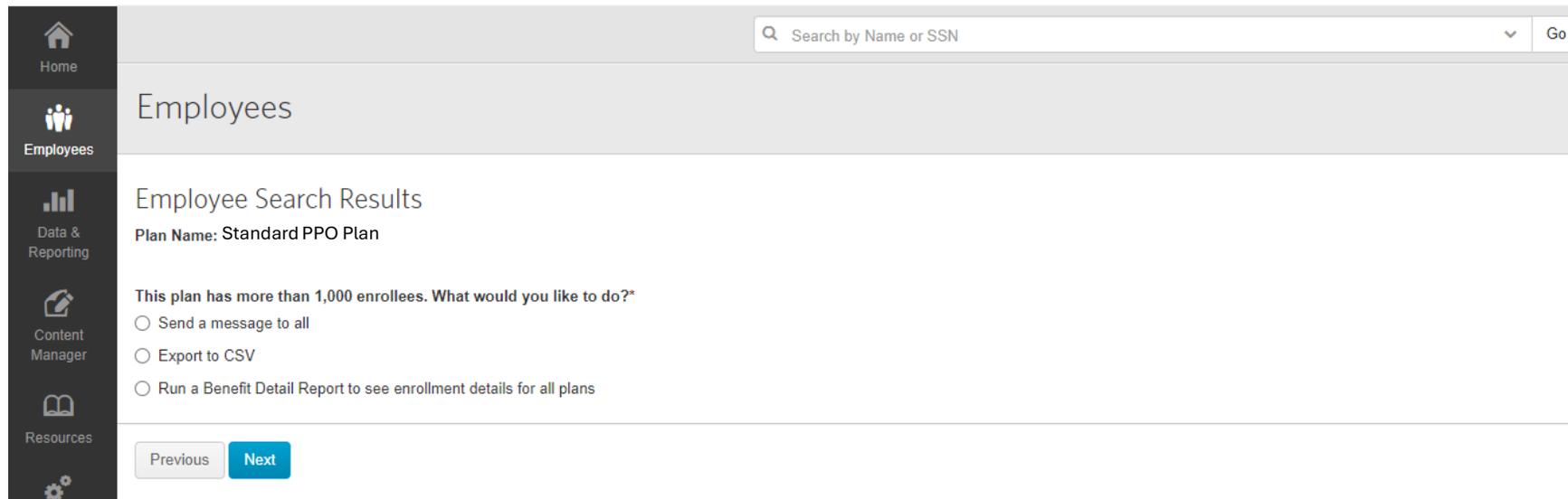
Displaying items 1 - 25 of 241 More Results ▾

<input type="checkbox"/>	Type	Name	SSN	Actions
<input type="checkbox"/>	○	██████████	██████	+ ▾
<input type="checkbox"/>	○	██████████	██████	+ ▾
<input type="checkbox"/>	○	██████████	██████	+ ▾

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



The screenshot shows a web application interface for viewing benefit enrollment. On the left is a dark sidebar with navigation icons for Home, Employees, Data & Reporting, Content Manager, Resources, and a settings gear. The main content area has a search bar at the top with the text "Search by Name or SSN" and a "Go" button. Below the search bar, the page title is "Employees" and the sub-header is "Employee Search Results". The selected plan is "Standard PPO Plan". A message states: "This plan has more than 1,000 enrollees. What would you like to do?*" Below this message are three radio button options: "Send a message to all", "Export to CSV", and "Run a Benefit Detail Report to see enrollment details for all plans". At the bottom of the main content area are "Previous" and "Next" buttons.

Comparing Benefit Plan Counts

The **BENEFIT 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 **BENEFIT PARTICIPATION** widget displays two employee counts for each plan: one for the initial plan year selected and another for the second plan year selected.

Benefit Participation



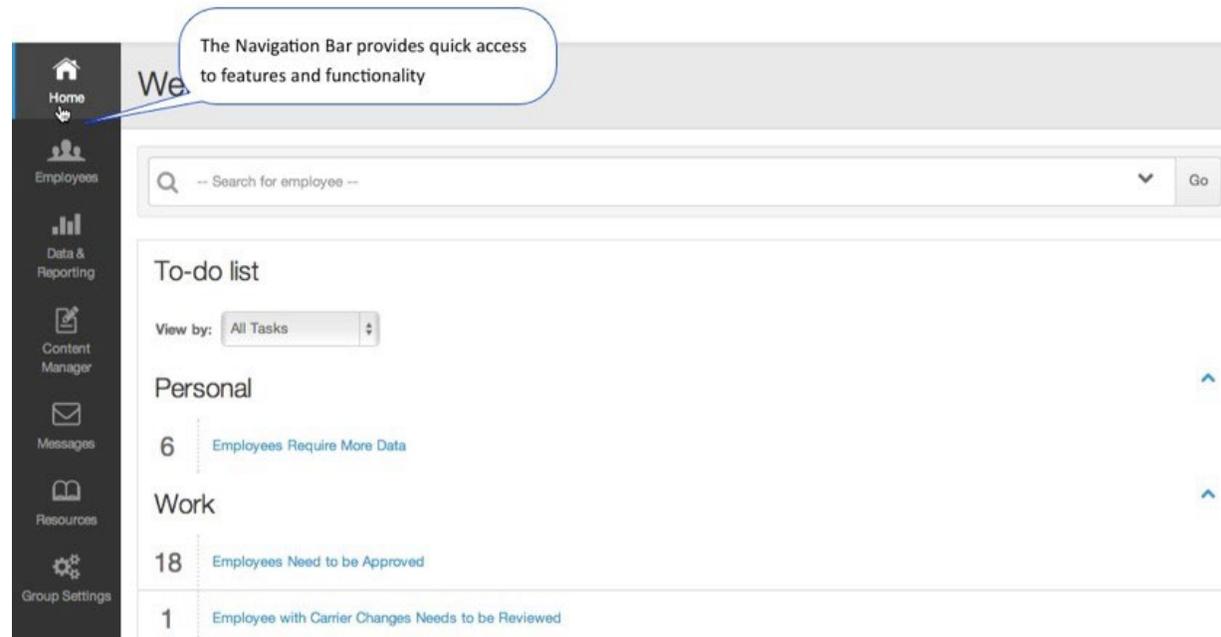
Select the desired plan year

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

Using Navigation Tabs

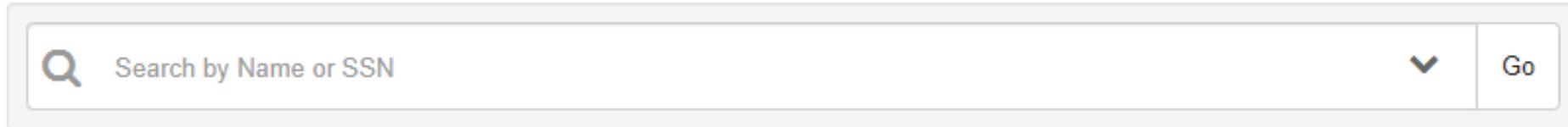
The **NAVIGATION BAR** on the left portion of the screen includes tabs that allow you to dive deeper into the system. Your access to certain tabs may vary depending on your account permissions.

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.

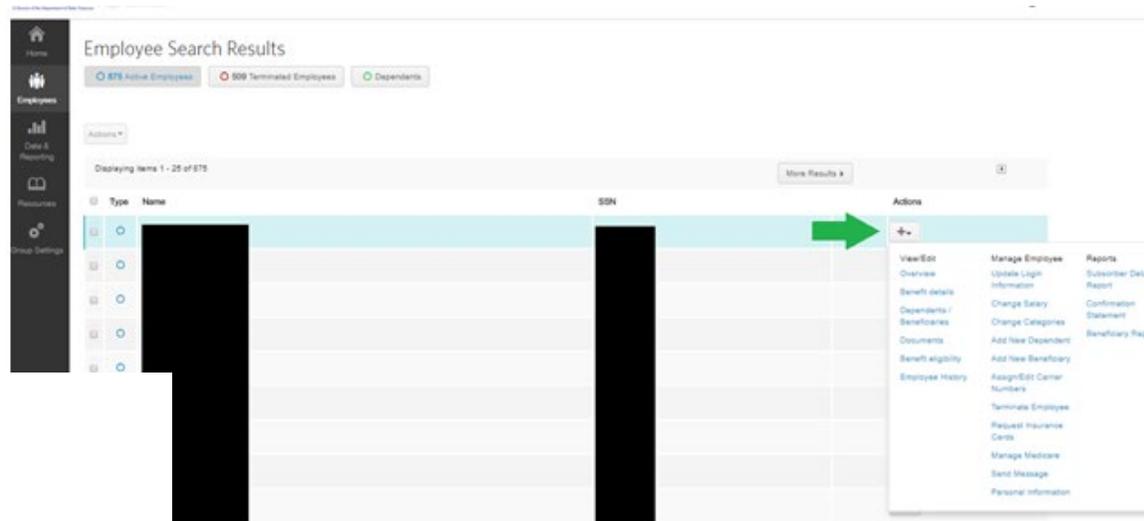


A search bar with a light gray border. On the left is a magnifying glass icon. To its right is the placeholder text "Search by Name or SSN". Further right is a downward-pointing chevron icon. On the far right is a button labeled "Go".

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.

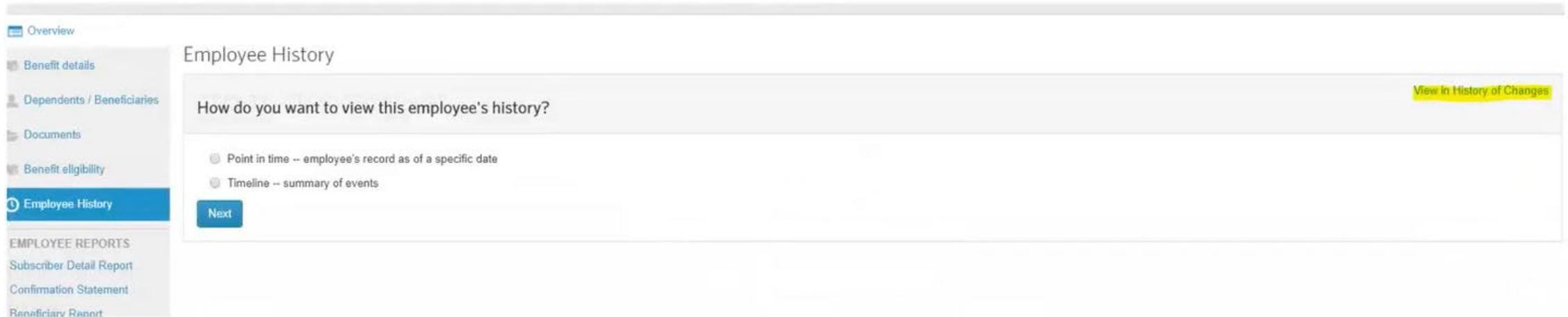
The screenshot displays the 'Data & Reporting' section of the eBenefits system. A red arrow on the left points to the 'Data & Reporting' menu item in the sidebar. The main content area features a search bar at the top right with the placeholder text 'Search by Name or SSN'. Below the search bar, the 'Data & Reporting' title is centered. A horizontal menu lists various report categories: 'Your reports', 'Standard reports' (highlighted in blue), 'Scheduled reports', and 'ACA Reporting'. Below this menu, a 'Popular Reports' section is displayed as a table.

Report Name	Description
★ Benefit Summary	Includes cost and enrollment summary information for each plan and coverage level
★ Benefit detail	Includes cost and enrollment information for each covered person
★ Benefit refused / cancellation	Includes enrollment information for persons that refused or canceled coverage
★ Employee Participation	Includes detailed information regarding employee participation
★ Employee census	Includes name, address, and date information for all employees
★ Dependent census	Includes basic information for dependent spouses and/or children; you have the option to show only dependents turning a particular age between dates that you specify
★ Terminated employees	Includes basic information for employees terminated between dates that you specify
★ Task List	Provides a list of items which requires attention
★ Active User Accounts	Includes details of current active user accounts

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.



The screenshot shows the 'Employee History' page in the eBenefits system. On the left is a navigation menu with options: Overview, Benefit details, Dependents / Beneficiaries, Documents, Benefit eligibility, Employee History (highlighted), EMPLOYEE REPORTS, Subscriber Detail Report, Confirmation Statement, and Beneficiary Report. The main content area is titled 'Employee History' and contains the question 'How do you want to view this employee's history?'. There are two radio button options: 'Point in time -- employee's record as of a specific date' and 'Timeline -- summary of events'. A 'Next' button is located below the options. A yellow highlight is present on the 'View in History of Changes' link in the top right corner of the main content area.

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.

The screenshot shows a web application interface with a search bar at the top containing the text "due to". Below the search bar, there are several entries for "NC Flex Voluntary AD&D" and "NC Flex Vision". Each entry has a "LIFE" icon and a title. The first entry is "NC Flex Voluntary AD&D - 2020 NC Flex Accidental Death and Dismemberment (01/01/2020 - 12/31/2020)". Below this entry, there is a table with columns "Old Value" and "New Value". The table shows changes in "Allocation Percent", "Relationship", and "Primary/Secondary". The second entry is "NC Flex Voluntary AD&D - 2019 NC Flex Accidental Death and Dismemberment (01/01/2019 - 12/31/2019)". Below this entry, there is a similar table showing changes in "Allocation Percent", "Relationship", and "Primary/Secondary". The third entry is "NC Flex Vision - 2019 NC Flex Vision (01/01/2019 - 12/31/2019)". Below this entry, there is a table showing changes in "Effective Date", "Status", "Description", and "Relationship". The fourth entry is "NC Flex Critical Illness - 2019 NC Flex Critical Illness (01/01/2019 - 12/31/2019)". Below this entry, there is a table showing changes in "Edited Subscriber : Kristen Walker Carter".

Old Value	New Value
50.0	50.0
Child	Child
Secondary	Secondary

Old Value	New Value
50.0	50.0
Child	Child
Secondary	Secondary

Old Value	New Value
	08/01/2019
	SPECIAL
	Accepted
	Child

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.