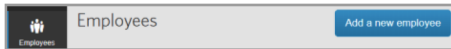




# Benefits Administrator Quick Tips

## How do I add new employees?

To add new employees to the system, select the **Employees** tab and then select the **Add New Employee** button.



Note that required fields are identified with an asterisk (\*).

The following fields are required to add a new employee to the system:

- First and Last Name
- Gender
- Date of Birth
- SSN
- Hire Date
- Address

Other fields may be required depending on the settings established for your company.

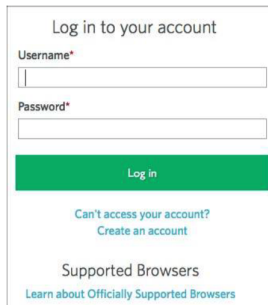
## How do employees access the system?

Depending on settings established for your company, employees may log directly in to the system or may access it from another portal. If they log directly in to the system, they receive their credentials in one of two ways after their account is created within the system:

1. A Benefits Administrator (or Agent) sends employees their Username and Password so that they may log in to the system. The first time they log in, employees are required to change their Password.
2. Alternately, employees may self-register.

To self-register, employees will:

- Enter identification information.
- Create a Username and Password.
- Enter 3-5 Secret Questions/answers.



## What are my login requirements?

To log in to the system, enter your Username and Password and select Log in. Your Password must:

- Contain 8-15 characters.
- Contain at least one capital letter.
- Contain at least one lower case letter.
- Contain at least one number.
- Not have more than two of the same characters in a row.
- Not be the same as a previous password.
- Not contain your Username.

## SESSION TIMEOUTS

A system message warns you that you'll be logged out of the system if you remain inactive after 30 minutes. If you don't respond to the message, you're returned to the Login page and must re-enter your Username and Password.

## LOCKOUT PROCESS

When you fail to log in after a number of attempts, your Username is disabled. A Systems Administrator must unlock it.

## How do employees reset passwords?

If employees forget their password, they can select the Cannot access your account link on the Login page. Then they must:

- Enter identification information.
- Verify information to match what has been entered into the system.
- Create and confirm a new password.

Note: Depending on your permissions, you may be able to reset employee passwords by selecting Update Login Information from the Manage Employee drop-down on an employee's record.

## How do I send messages to employees?

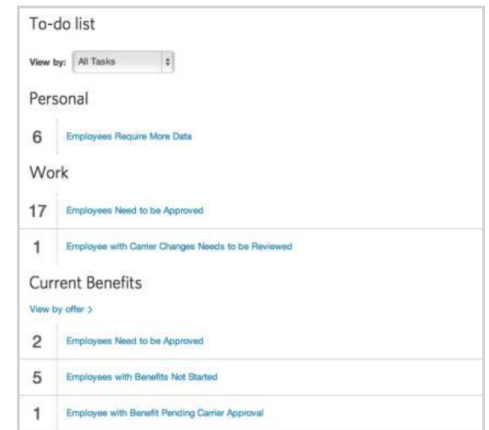
If your account has permissions to the Messages tab, you can:

- Define which types of messages will be delivered as well as the content of the messages.
- Send SMS text or email messages to employees.
- Define all aspects of the communication.
- Track activity of messages sent and messages failed via reports.

## How do I manage my daily tasks?

The To-do list shows actions that you need to perform based on specific categories of information, such as an employee's benefits and tasks on the Work or Personal tabs.

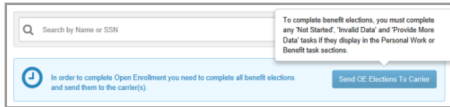
Keeping up with the items in your To-do list is important to ensure that data is sent to insurance carriers quickly and your employees' benefits are processed promptly.



Note: If your company has over 1,000 employees, the **To-do list** is collapsed by default, and you must select View by > All Tasks to see all categories of information.

## How do I manage Open Enrollment?

The Open Enrollment Manager supports additional options and displays specific messages in your To-do list for quick and easy access to your company's Open Enrollment period.



Depending on settings established by the carrier, at the end of your Open Enrollment period, you can:

- Send elections to the carrier and close your Open Enrollment period.
- Review the appropriate tasks (such as benefit approvals and tasks not yet started) that must be completed before ending the Open Enrollment period.
- Receive email messages that indicate the Open Enrollment period has been successfully completed or, conversely, that attention is required because of outstanding tasks.

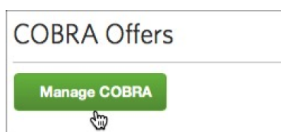
## How do I change plans for an existing employee?

- Search for the employee.
- Select the Benefit Details link for the employee.
- Edit the benefit election.  
Note: You may be required to enter a life event, such as birth, marriage, etc. as a reason for changing the employee's benefit plan.
- Select the Edit button next to the Plan section to change the benefit plan
- Select the new benefit plan and select Next.
- Continue with the enrollment flow and select Save when you have completed the plan change.

## How do I add COBRA benefits for an employee?

COBRA functionality is used in place of COBRA forms and reports that are sent to your insurance carrier. Employees and dependents that are canceled from basic group coverage may be eligible for a COBRA election. COBRA benefits are added via the Benefit Details link.

- Search for the employee.
- Select the Benefit Details link.
- Select the Manage COBRA button for the COBRA Benefit.



- Select the Add Policy button.
- Select a Qualifying Event.
- Select the plan. Note: the plan may be selected by default.
- Select Benefits Coverage Level.
- Add dependents (if applicable).
- Enter optional information.
- Save the benefit election.

## How do I cancel a benefit policy without changing the employee's Active status?

When you cancel benefits for employees, they remain as Active employees.

- Search for the employee.
- Select the Benefit Details link for the employee.
- Edit the benefit election.
- Select the Cancel Benefits for All button.



- Select OK for the warning message that displays to confirm you want to cancel benefits.  
Note: You may be required to enter a life event, such as birth, marriage, etc. as a reason for changing the employee's benefit plan.
- Enter the date to cancel benefits and select Next.
- Review and Save the changes.

## How do I terminate employment? What's the difference between terminating employment and canceling benefits?

When you cancel benefits for employees, the employee remains in an Active status. Terminating employment changes the status of the employee from Active to Terminated and also cancels all benefits for the employee.

- Search for the employee.
- Select Terminate Employment from the Manage Employee drop-down box.
- Enter the employment termination date for the employee.
- Select whether or not to disable the employee's login.
- Enter a Termination Reason and select Next.

- Review the benefit cancellation date for each benefit available. This date is pre-populated based on the employee's termination date and the benefit termination rule.
- Save the changes.

## How do I rehire employees?

Once employment is terminated, employees can be rehired and their benefits can be reinstated. The system allows for a rehiring strategy to be based on if the rehire date is within a certain number of days or more than a certain number of days past the termination date as defined in the Rehire Rules.

To rehire an employee:

- Search for the employee.
- Select Rehire Employee from the Manage Employee drop-down box.
- Enter the employee's rehire date.
- (If applicable) Reset employee Login and Password.



- Allow employee to login  
Note: You can assign a new password for the rehired employee. If you allow your employees access to make their own changes, create a new password and select the Allow employee to login box; if not, leave the fields blank.
- Select Next.
- Select the appropriate Benefit Reinstatement radio button.
- (If applicable) Specify how to reinstate benefits.
- Review the rehire information and select Save.

## What reports can I access?

You can create numerous group reports, including Benefit Detail, Employee Census, and Dependent Census reports.

From the Data & Reporting tab, you can:

- Generate reports in multiple file formats, including PDF, Excel, or CSV.
- Sort reports by employee name or SSN.
- Group and/or filter reports.
- You can also generate employee specific reports from the Employee Reports section of the employee's record.



MASSACHUSETTS

Blue Cross Blue Shield of Massachusetts is an Independent Licensee of the Blue Cross and Blue Shield Association  
® Registered Marks and Service Marks of the Blue Cross and Blue Shield Association. © 2018 Blue Cross and Blue Shield  
of Massachusetts, Inc., and Blue Cross and Blue Shield of Massachusetts HMO Blue, Inc  
188997M

(09/18)