MBC HR Interface

User Guide

2022 Version

HR Interface

The MyBenefitChoice (MBC) HR interface is your tool to access the information in the Milliman MBC system. It provides direct access to an employee's enrollment information without going through the participant enrollment website. You can quickly review the census, benefit and dependent election records, view the source of the election (employee, HR, or system) and the date and time the election occurred, and the beneficiary information.
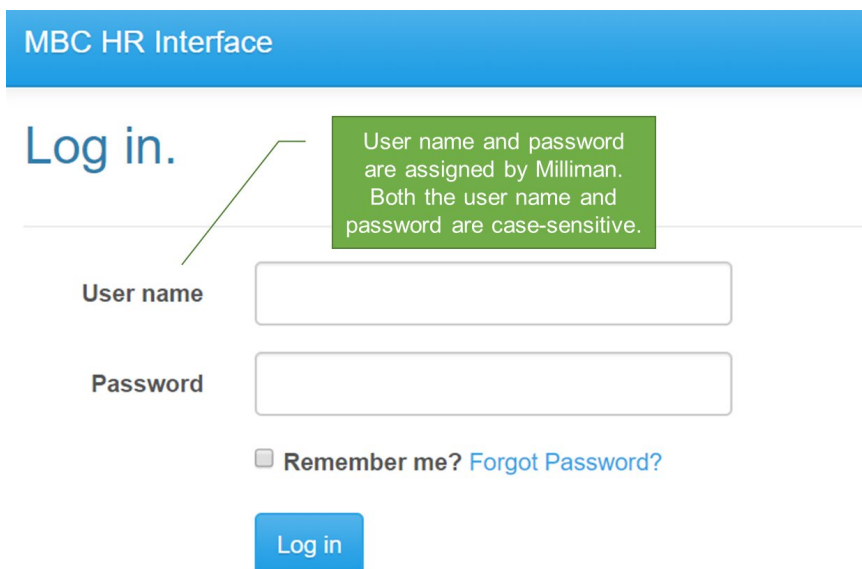
The HR interface also has robust reporting tools for you to summarize and report on your benefits data.

To access the site, open your web browser and connect to
https://www.mybenefitchoice.com/HRInterface.com.

The instructions in the following pages will provide you with a quick overview of the interface.

The HR Interface is a web interface tool that goes through a constant enhancement/ revision version cycle. This HR Interface guide will be updated once per year and will include all revisions since the last version.

Logging In

MBC HR Interface

Log in.

> User name and password are assigned by Milliman. Both the user name and password are case-sensitive.

User name [   ]

Password [   ]

☐ Remember me? Forgot Password?

Log in

Home Page Menu Overview

- **Search** – This item allows you to search for an individual employee or dependent record.
- **Participant** – Employee's general information (generally only displays after you have searched for and pulled up an individual's information).
- **Benefits** – This section shows each plan year's benefits summary information at-a-glance.
- **Event History** – Displays the individual's event history in the system (including new hire, annual enrollment, qualifying events) and when/how the participant accessed the MBC system.
- **HR Tool** – Your main resource for making changes in the system including approving qualifying events, approving EOI, etc.
- **Report** – Your benefits reporting tools.
- **More** – Various tables of information providing dependent information, beneficiary designations, other info (such as guarantee issue details, PCP designations and uploaded documents), billing, & HRA details.

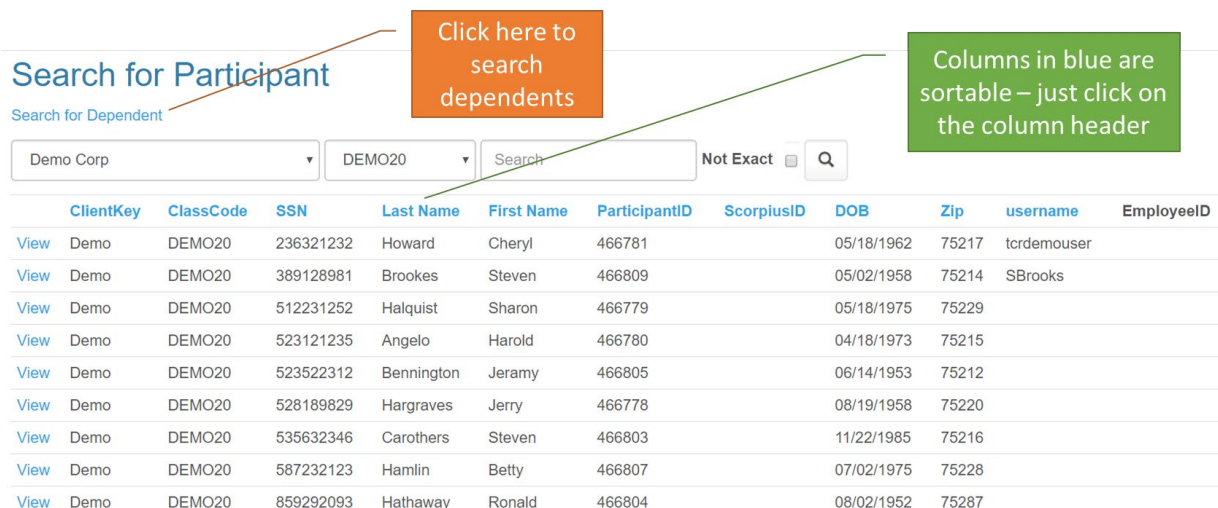## Search – Functionality

Search Options

- Select a Client - Allows the User to search for an employee by client name.
- Select a Class - Allows the User to search for an employee by Class.
- Search Box
  - If you know the participants information type in the SSN, Last Name, or Participant ID to find the record.
  - If you don't know the exact spelling select the "*not exact*" box to bring up all relevant records.
  - When a name search is done and more than one record exists for that last name use the first name, SSN, and group (Plan) the employee belongs to within your organization to help you further identify the correct employee.

Search Information Displayed

Once an employee record has been identified using the search function the employee data will display in each section.

Sorting

The name fields can be sorted in alphabetical order. Click on the First Name or Last Name in the column header for the most relevant way to sort. The names will sort in descending order first (Z to A). Click the field again and it will be sorted in ascending order (A to Z).

Selecting a Participant

- Click **View** to take you directly to that employee's Participant page.

Participant – Functionality

This section provides an overview of the employee's current census and personnel records. There is easy access to historical data – just click on the 🛈 icon (click on it again to hide the information). For example, the 🛈 link to the right of SSN will show if the employee's SSN has changed in the system based on either data from your eligibility files or from manual data entry.

Participant Information

The following links can be used to access different aspects of the system (functionality may or may not be available, depending on the services you receive from Milliman:

Demographic Information

- This displays the most current demographic information on file with Milliman, including the address of record.

- To edit the information, scroll to the bottom and click the Edit button:

Employment Information

- <u>Eligibility Date</u> – This date drives the effective date of benefits when an employee is first eligible for benefits or is rehired.

- <u>Date of Hire</u> – The date of hire for the employee as provided on the eligibility file.

- <u>Date of Hire 2</u> – If an adjusted date of hire applies, it will show here.

- <u>Surviving Spouse</u> – For retiree medical administration, this flags a surviving spouse record for easy identification. This field drives certain administrative processes such as benefits offered and the premium charges.

- <u>Vesting Years</u> – For retiree medical administration; the subsidy provided can be calculated based on the retiree's vesting years/service.

- <u>Service</u> – If the vesting service credit for subsidy is capped, it will show here. For example, if a retiree has 33.75 years of service but the employer's subsidy of 2.5% per year of service is based on a cap of 30 years, the Service will show 30.

- <u>ER Contribution %</u> – The percentage of the total premium the employer will contribute to monthly premium. The employee owes the difference between the total premium and the amount the employer will contribute based on this percentage. Mostly used for retiree coverage.

- <u>Pension Amount</u> – This information is refreshed monthly and represents the monthly pension benefit a retiree receives (where Milliman is also the pension administrator).

- <u>No Web Enroll Access</u> – Exception records do not have web access. This box will be checked in such instances.

- <u>No Update</u> – The No Update field tells us this is an exception record. It means the routine file load will not automatically change any data for this participant. Changes must be processed manually. This box will be checked if the record must be manually updated.

- <u>ACA Medical Only</u> – This field is used to identify employees who are only eligible for medical benefits in order to meet ACA compliance. This suppresses the other benefits for that class from being displayed to the employee.
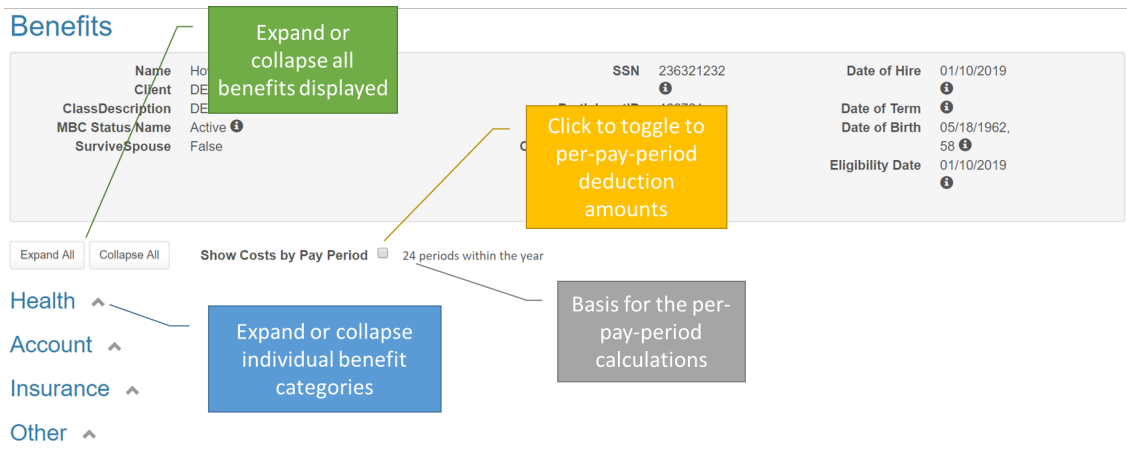
Process Level

- These fields are considered "employer-defined," meaning that they can be used for anything that you needs to store on an employee's account. If you have custom fields that Milliman is importing or using, they will display here.

Pay

- These fields are considered "employer-defined," meaning that they can be used for various pay type items, such as Annual Salary – which is typically required, and other pay items used for benefits calculations including adjusted annual salary, hourly pay, etc.

- Updating annual salary will not automatically update other calculated benefit amounts. A routine process will need to be run (typically overnight) to update benefit calculations.

Benefits – Functionality

An employee's entire benefit plan election can be viewed by plan year. Select the drop down arrows or select "Expand All" to see detailed information about each benefit.

Event History – Functionality

All historical changes that have been made in the system.

Event Log

- ID – The order in which the actions were processed against this record. Typically, the most recent action is in the first row
- Created – The date and time the action was processed
- Name – The type of action that took place or will take place
- Enroll – record open to enrollment, generally due to a status change.
- New – a record was loaded that was identified as a new hire or rehire.
- Recalc – a recalculation of benefits has occurred. Generally related to salary based benefits or age rated benefits.
- Term – the employee/retiree is no longer eligible for benefits.
- Initial – the date the record was initially loaded during the client implementation.
- Note – The reason the action took place. Death – When combined with an action of Term, this means the participant's coverage has terminated due to the death of the participant.
- Begin – The date the action is effective
- End – The date the action ends. This date determines if the web is open and for how long.
- Closed/Pending – True means the action has been closed; False means the record is still open and waiting for final processing by the load program to close the record.

Web Access Log

The web history allows you to view when an employee's record was accessed and by whom.

HR Tool – Functionality

Includes information for event history, Dependents, Beneficiaries, other information, Billing, HRA, HR tool and Reports. Some of these items may not be relevant to your arrangements with Milliman.

Note that for participant-specific functionality, please Search and pull up the participant for which you wish to perform a function before proceeding with most of the tools below.

Account

- Register Participant
    - This tool is used to register a participant who would like to use the website, but does not wish to give their email address.
- Reset Password
    - Reset password for a user. You will receive a randomly generated password. This functionality is not available when single sign on (SSO) is in use.
- Send Password Email
- Unlock Participant
    - If a participant is locked out, this tool can be used to immediately unlock them. Otherwise, the participant must wait at least one hour before attempting to login.

Events

- Approve Pending Event
    - Events requiring documentation can be approved using this tool. Click on the event you want to approve and enter the date you would like the event to be effective.
- Approve Dependent
    - Dependents requiring verification can be approved using this tool. Click on the dependent you want to approve and enter the date you would like the dependent to be effective.

- Deny Dependent
  - Dependents requiring verification can be denied using this tool. Click on the dependent you wish to deny. The denial will automatically process.
- Create Life Event
  - Life events vary significantly from client to client and a separate document will be developed to help you understand which events to use under certain circumstances and the dates you should use.
- Create Work/HR Event
  - Work events vary significantly from client to client and a separate document will be developed to help you understand which events to use under certain circumstances and the dates you should use.
- Close an Open Event
  - If you have entered an incorrect event, or you need to close an open event (and close the enrollment window for the participant), you may use this tool.

Tools

- Access Enrollment Site
  - Launch to the participant website. You must have a participant selected.
  - Note that you can specify a date in the future or past to access the site. This can be used to enroll someone during a window that has already closed.
- Mailing Complete
  - Log of mailed items
- Create New Mailing
  - Request a new mailing such as a confirmation statement or a new hire checklist – only available to clients with mailed confirmation statements.
- Health Rate Finder
  - Review rates by class and zip code.
- Add Process Level
  - Update user-defined items. The most recent item will be used in reporting.

- Add Pay
    - Update user-defined items. The most recent item will be used in reporting.
- Approve Pending EOI
    - Use this tool to manually approve pending amounts of life insurance. Enter the date you would like the new coverage to be effective.
- Deny Pending EOI
    - Use this tool to manually deny pending amounts of life insurance. No date needs to be entered.

Work Event Process

- Create New Participant
    - Use this tool to manually create a new participant. Be sure to enter the information exactly as will be submitted on the next eligibility file to prevent duplicate records.
- Terminate Participant
    - This tool terminates the participant and all benefit coverages per the termination rules set up in the system (e.g., date of death or end of the month following termination of employment).
- Create Dependent
    - Allows you to easily add a dependent to the system for a participant. Be sure that the dependent information exactly matches what will be sent on the following eligibility file to prevent duplicate dependents.
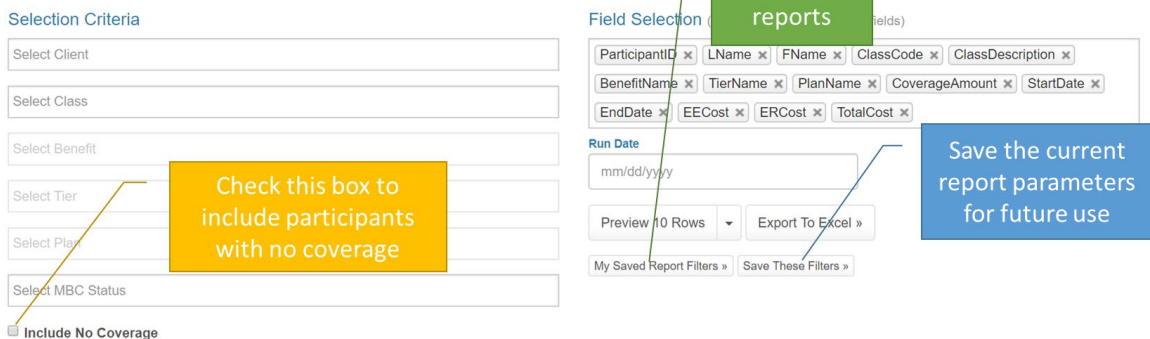
Report – Functionality

Only the dependents with benefit coverage show on this screen. A dependent's coverage history cannot be viewed from this screen. This is demographic information for the dependent. The dependent coverage history can be viewed through the benefits tab.

Report Builder

This allows for the creation of simple reports based on criteria selected from the various boxes. Due to the flexibility of this tool, no specific instructions are available, but training may be provided upon request:

- <u>Run date</u> – Enter the date for which the report should be run. If you leave the date field blank, the report will pull everyone who is currently in an active status in the system. This means that if you have already terminated someone, but it was in the future, they will not pull into the report if you leave that field blank, as they are currently listed as "inactive" in the database.

- <u>Field selection</u> – Multiple fields can be selected by holding down the CTRL key and clicking on the items. You can also search for items and add them by name.

- Some other tips:

Census Report

- <u>Employee Census</u> – Provides a full census of participants as of the run date. Fields are not customizable. This report can take a long time to run due to the back-end processing of creating the format of the report (single line of benefits per employee).
    - Note that the census report will pull all participants and cannot be limited to only active participants.

Group Reports

- <u>Event History</u> – Enter a date range to receive a list of events (such as qualifying events, new hires, salary updates, etc.) that have occurred during those time frames. Fields are not customizable.

- <u>EOI Pending Report</u> – Roster of participants in an EOI pend status. Data displayed includes eligible earnings, volume of coverage requested and when request was made.

- <u>Enrollment Non-Response Report</u> –This report is used during open enrollment. It lists all employees who have not accessed the web to view or update their benefit elections, or called the Milliman Benefits Service to review/discuss their benefit elections

- <u>Invalid Dependent SSN Report</u> – List all dependents with invalid SSN.

- <u>Pending Dependents</u> – If you verify dependents before adding them to coverage, this report will pull those dependents pending approval.

- <u>No Beneficiary</u> – List of participants and benefits for which a beneficiary has not been elected.

- <u>Employment History</u> – Provides a list of all employment changes during a range.

- <u>Coverage History</u> – Provides a full list of all coverage changes during a specified timeframe.

- <u>Multiple Open Period Report</u> – List of participants who have more than one event open at the same time (e.g., new hire during annual enrollment).

Informational Reports

- <u>Participant Name Change</u> – List of participants who have had name changes over a specified period of time.

- <u>Dependent Name Change</u> – List of dependents who have had name changes over a specified period of time.

- <u>Non Elected Dependents</u> – List of dependents without current coverage in MBC.

- <u>Transfer Report</u> – List of participants who transferred classes or subclasses over the specified timeframe.

Individual Reports & Forms

- These reports are in development.

Headcount Reports

- <u>Headcount By ClassCode</u> – Tally of active participants by MBC Class as of a specified date.

- <u>Covered Members by Tier</u> – Tally of active members (employees and dependents) by health plan (medical, dental, vision, etc. – plans that have tiers) and by tier as of a specified date.

- <u>Covered Members by Plan</u> – Tally of active employees (participants), spouses and children by health plan (medical, dental, vision, etc.) as of a specified date.
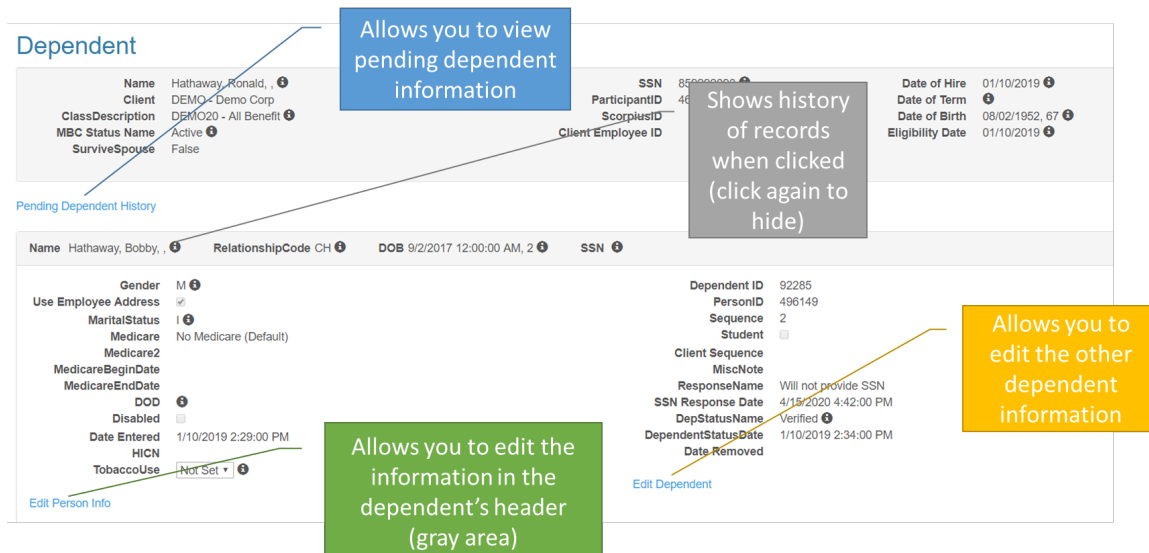
Web Usage Reports

- <u>Login Log</u> – Reports the number of logins by date during a selected timeframe.

More – Functionality

We have limited space on the top menu, so the "More" link drops down additional menu items for you to access.

Dependent

This menu allows you to view the dependent information for an individual employee.

Beneficiary

Similar to the dependent information, this menu allows you to review the individual's beneficiary information. Note that dependent records are separate from beneficiary records (although a participant can use a dependent as a beneficiary). Participants will need to update both records separately.

- Benefit – The benefit type for the beneficiary designation.
- Primary % – The primary beneficiary designation will show in this field. If more than one primary beneficiary is designated, the amount shown will be less than 100%. In the example above, Sam Jones is the primary beneficiary at 100% for both benefits.
- Secondary % – In the event the primary beneficiary(ies) is not alive at the time of

the employee's death, the secondary beneficiary will receive the benefits in the amount designated by the employee.

- Date Entered – The date the beneficiary designation was made by the employee.
- Deactivated Date – The date the beneficiary designation was revoked by the employee. If the employee terminates employment or moves to a non-benefit eligible status, the deactivate date will equal the last day the benefit was in effect.

Other Info

This menu offers access to three additional sets of participant information:

- Load History – Click this button to access the information about the participant's eligibility history
- Guarantee Issue – Table of the guarantee issue (GI) settings for applicable benefits (typically life insurance). May vary based on annual enrollment allowed changes versus year-round allowed changes (with qualifying events).
- Mailing Log – If you use Milliman for mailing participant information, this will show the items mailed, timing, etc.
- Decline Log - This reflects any benefits that were declined due to failed EOI.
- Primary Care Provider/Dentist (PCP) – History of PCP elections. Usually sent once to the carrier and then dropped from eligibility files (PCPs are maintained by the carrier)
- Imputed Income Response – Historical calculations of imputed income calculations. Will be updated based on your salary update settings (annually or at time of salary change).
- Uploaded Documents – Area where you can access a participant's uploaded documents.

Billing

If Milliman provides a billing service for premium payment (retirees, leave of absence, etc.), the billing/payment history will be available for your review in this section. A separate user guide is available for the billing section.

HRA

For retiree administration clients who use have a retiree HRA, this menu item allows you to view the HRA balance versus premiums deducted from the account.