

Benefits 24/7

Benefits Administrator Manual

PEBB Version

*Chapter 2 – Managing
Benefits 24/7*



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Introduction

This manual is intended for use as a training document only. The purpose of this manual is to assist you with managing employee information that affects Health Care Authority (HCA) sponsored PEBB Program insurance coverage. The following instructions pertain to information relevant to HCA insurance only. If there is any inconsistency between information in this manual and the Revised Code of Washington (RCW) and Washington Administrative Code (WAC), RCW and WAC take precedence.

If you have questions about Benefits 24/7 or any procedures contained in this manual, contact:

Outreach and Training

Phone: 1-800-700-1555

[HCA Support](#)

Contact Information

Outreach and Training For Benefits Administrators Use Only	
Phone:	1.800.700.1555
Email:	HCA Support – Select the Benefits administrator Inquiry tile
BA website:	PEBB benefits administrators Washington State Health Care Authority
Order materials:	Order materials
Fax number:	360.725.0771
Insurance Accounting /Accounts Receivable	
Email:	HCAPEBBAR@hca.wa.gov
Fax number:	360.753.9152

Manage access to Benefits 24/7

Requires Benefits 24/7 Admin access rights granted by HCA.



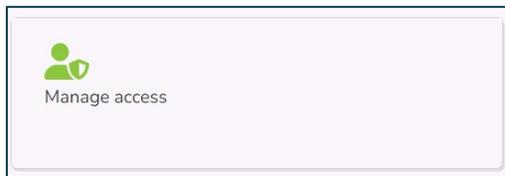
When adding and updating permissions for benefits administrators, verify the organizations' contacts listed under the Organization Profile are up to date. See the [Organizational Profile](#) section of the manual for instructions to add, update, and remove contacts.

The PEBB Program will grant Administrative (Admin) access to staff named by a designated authority of the employing organization. The designated authority must provide the request in writing through HCA Support. *Recommendation: At least one main administrator and a back-up should be named. If an update is required, a request in writing from the designated authority is required.*

Once Admin access is granted, the Admin has the ability to grant Admin, Edit and Read Only access to Benefits Administrators as needed, as well as perform all functions in the system. Due to the sensitive information housed in the system, access should be granted based on tasks to be completed.

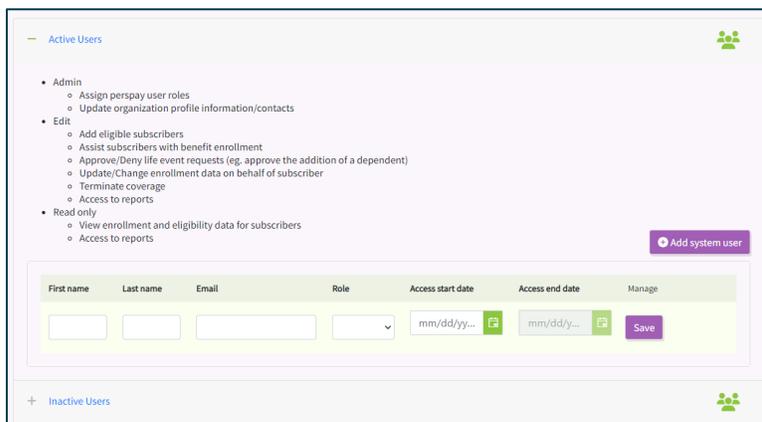
Granting access

Log into Benefits 24/7. From the Administrative Dashboard, select the Manage access tile.



Manage application access

1. To manage application access, select 'Add system user'.



2. Enter the first and last name of the benefits administrator in the appropriate fields.
3. Enter their work email address.
4. Select the role from the dropdown menu:
 - **Edit** – This role allows benefit administrators to add eligible employees, verify or deny dependent verification, assist employees with benefit enrollment, approve or deny special open enrollment events, update or change enrollment data on behalf of the employee, terminate coverage, and access reports.
 - **Read only** – This role allows a user to view employee accounts and access reports.
5. Enter the 'Access start date'. Select 'Save'.
6. Repeat the steps for each benefit administrator.

Change or remove access



Reminder – as staff move on to new positions or leave employment, be sure to remove access to Benefits 24/7 access.

- **Remove Permissions** – Enter an Access end date in the field. Select 'Save'. The record will be removed from the Active Users list and added to the Inactive Users list below.
- **Change Permissions** – Select the new role from the dropdown menu. Select 'Save'.

Restore access

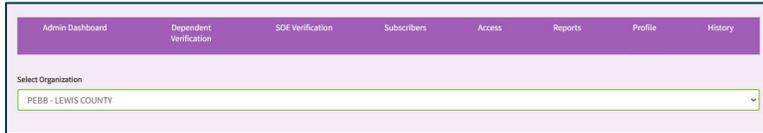
User access can only be restored if the account was never claimed. If the account was claimed, add the benefits administrator as a new user.

- Select the + symbol next to Inactive Users.

- Remove the access end date from the user to be reinstated. Select 'Save'.

Permissions at multiple PEBB employers

If a benefits administrator manages multiple agency's eligibility and enrollment an employer's administrator can add 'Admin or 'Edit' access through the Manage Access tab. Once the benefits administrator is given access, there will be a drop-down menu at the top of the dashboard to switch between employers.



Updating the Benefits 24/7 Admin designation

Adding and removing Admin designation for Benefits 24/7 must be completed by the PEBB Program. The request must come from the employer's designated authority. The request cannot come from the person who is being named admin.



It is important to remove access to Benefits 24/7 for Benefits Administrators and Admins as they leave or change positions.

Admins must be added and removed by the PEBB Program. Admins can add and remove benefits administrators with 'Edit' and "Read Only' access.

1. The designated authority must send the request in writing through HCA Support.
2. The PEBB Program will add or remove the Admin.

Organizational Profile

The Organizational Profile includes information about the employer. Fields that are grayed out require HCA to update the information. It is important to notify Outreach and Training through HCA Support information that needs updating.



It is important to add, update, and remove contact information as it changes. This information is used by Outreach and Training, Accounting and Customer Service to coordinate coverage and resolve issues for active employees and terminated employees.

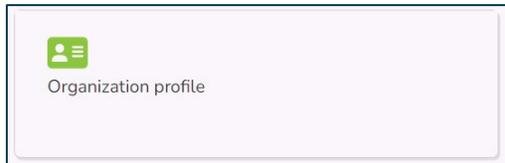
Add a contact

Contact information is used by Outreach and Training, Accounting, and Customer Service to coordinate coverage and resolve issues for active employees and terminated employees.

There are six contact types to choose from: Benefit Specialist, Insurance/Billing, LTD, Other, Payroll, or Superintendent.

Multiple roles may be assigned to the same person. Multiple people may be assigned the same role. It is important to keep the contact information up to date.

1. Log into Benefits 24/7. From the dashboard, Select the 'Organizational profile' tile.



2. Scroll down to the Contacts section of the page. Select 'Add contact'.



3. The contacts section expands. Select the + next to 'New contact'.

A screenshot of the expanded "New contact" form. The form is titled "Contacts" and has a purple "Add contact" button at the top right. Below the title is a light green input field with a plus sign and the text "New contact". The form contains several input fields: "First name*", "Middle initial", "Last name*", "Email address*", "Phone*", "Fax", "Email Address", "Phone Number", "Phone Number", "Mailing Address line 1*", "Street #, Street", "Mailing Address line 2*", "Unit #, Suite #", "City*", "State/Province*", and "Zip code*". There is a checkbox for "Address same as organization physical address". Below the address fields are "Contact types:" with checkboxes for "Benefit Specialist", "Insurance/Billing", "LTD", "Other", "Payroll", and "Superintendent". At the bottom right is a "Remove contact" button. At the bottom are two purple buttons: "Submit changes" and "Clear changes".

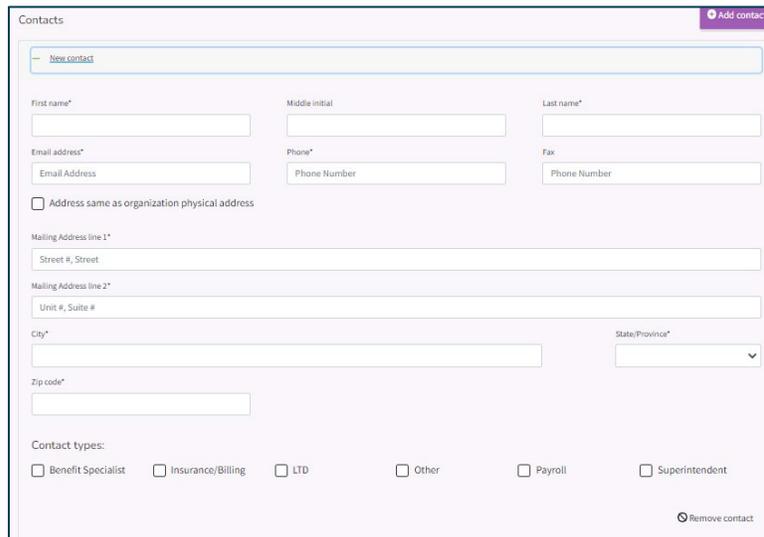
4. Enter First name, Last name, email address, phone number, and fax number if there is one. *Note: Fields with an asterisk are required.*
5. Select the 'Address same as organizational physical address' checkbox if it is the same as the address on the Organizational profile. If the address is different, enter the address in the fields provided.
6. Select the checkbox next to the appropriate Contact types. The choices include: Benefit Specialist, Insurance/Billing, LTD, Other, Payroll, Superintendent. Select all that apply.
7. Select 'Submit changes'.
8. Repeat for each contact.

Update contact information

1. Select the + next to the contacts name. The record expands.
2. Update the applicable information.
3. Select 'Submit changes'.

Remove a contact

1. Select the + next to the contacts name.
2. Select 'Remove contact' in the bottom right corner of the record.



3. The contact is removed.

Reports

The Reports tile contains reports benefits administrators can use to help with the administration of benefits. There are currently eight reports available.

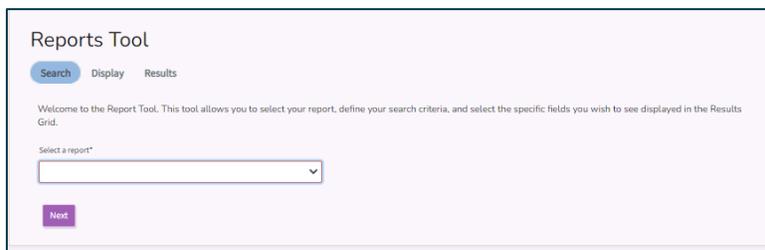
The reports include API Submission Report, Benefit Election Status, Dependents turning 26, Dependents without an SSN for an organization, LTD 90-day waivers, Represented employees, Spousal re-attestation for an organization, and State-wide benefit administrator contact list.

Select the 'Reports' tile.



Run a report

1. Select the desired report from the drop-down menu.



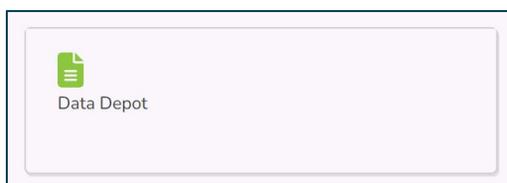
2. If a date or date range fields are available, enter the desired date/date range. Select 'Next'.
3. Select the fields that you would like for the report.
4. Select 'Run report'.
5. To download the report, Select 'Download'. The report will export to Excel.

Data depot

The Data Depot will be used by the PEBB Program to upload files for benefits administrators. If the files are uploaded for all employers a GovDelivery message will be sent to alert the benefits administrator. If you have not signed up for GovDelivery messages, you can register [here](#).

If the data provided is specific to your organization, an email will be sent to the contacts listed on the Organizational Profile.

1. Select the Data Depot tile on the Administrator's dashboard.



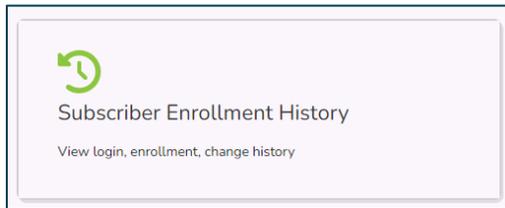
2. The file will display under the 'Previously uploaded files'.



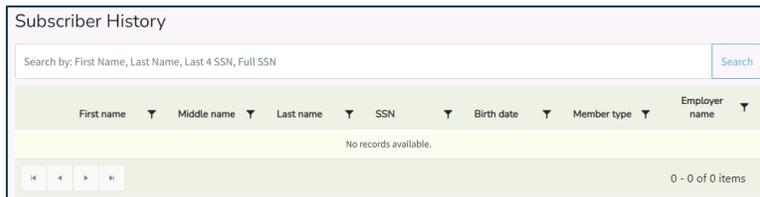
3. Select the Paper icon. Open the file. Save the file for future use.

Subscriber enrollment history

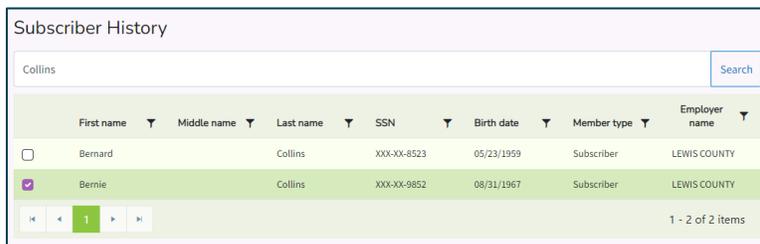
1. Select the Subscriber Enrollment History tile.



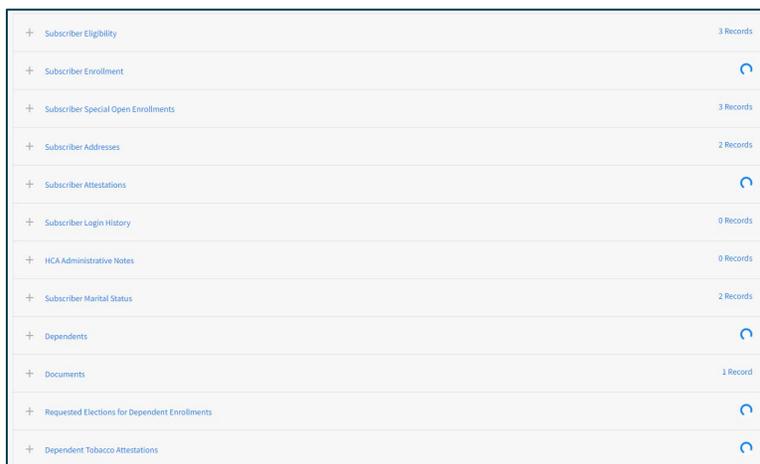
2. Search for the employee by entering their first name, last name, SSN or ITIN, or the last 4 of the SSN.



3. Select the checkbox next to the employee's name.



4. The Subscriber details are broken into categories. Select the + symbol next to the category to be viewed.



The categories include:

- **Subscriber Eligibility** – records the organization (s) name, effective date(s), and the termination date(s). It also shows who created and modified the account.
 - **Subscriber Enrollments** – records the elections made, the date the elections were made and who made the elections.
 - **Subscriber Open Enrollments** – records special open enrollments (SOE) submitted, date received, date of the event, effective date, SOE end date, verification status, verification date, who verified the SOE, modification date, and who created or modified the SOE,
 - **Subscriber Addresses** – records the employee’s residential and mailing address(es) and any changes made to the address, the date the address was created, the end date of the address if changed, the modified date, and who created or modified the address.
 - **Subscriber Attestations** – records the employee’s attestations, both tobacco and spousal, the attestation date, modified date, and who created or modified the attestation.
 - **Subscriber Login History** – records the date and time the employee logged into their account.
 - **HCA Administrative Notes** – records noted on the account left by HCA staff when correcting or modifying an account.
 - **Subscriber Marital Status** – records the marriage start date, marriage end date, who created the spouse account, and the date the account was created or modified.
 - **Dependents** – records dependents, their relationship, verification status, who approved or denied the verification, date the verification was approved or denied, the creation date, modified date and who created or modified the account.
 - **Documents** – records documents uploaded to the account, date they were uploaded and who uploaded the documents.
 - **Dependent Enrollments** – records the plans the dependent is enrolled in, the effective date, the enrollment reason, the end date, the termination reason, the date the dependent account was created, who created the account, the date the account was modified and who modified the account.
 - **Dependent Tobacco Attestations** – the dependents attestation, the date of the attestation, the date the attestation was entered, the date the attestation was created, who created the attestation, the date the attestation was modified and who modified the attestation.
5. If you need a copy of the history, Select ‘Download’ at the bottom of the page.

Troubleshooting employee access

Releasing employee account requires Benefits 24/7 Admin access.

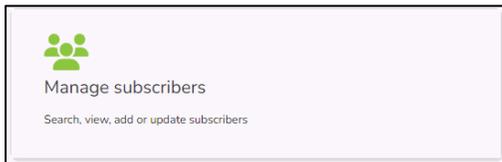
As a benefit administrator you may be contacted by eligible (or even non-eligible employees) inquiring about why they cannot access Benefits 24/7. When you are contacted, if you follow these instructions, you will be able to resolve almost every login issue.

Employee attempting to claim their account for the first time

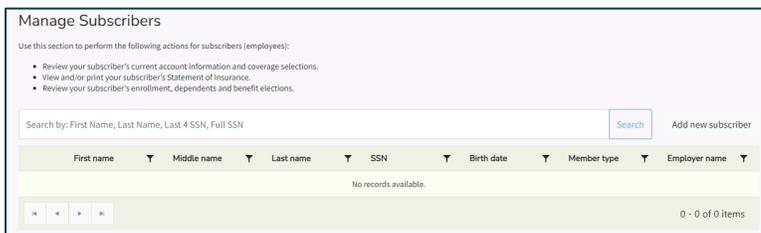
1. You receive notification that an employee has an issue accessing Benefits 24/7.
2. Is the employee eligible for PEBB Program benefits?
 - If 'yes', continue to step 3.
 - If 'no', let the employee know they are not eligible for PEBB benefits.
3. Is the employee's eligibility information in Benefits 24/7?

To determine if the employee is in Benefits 24/7:

- Log into Benefits 24/7 with your benefits administrator account.
- Select 'Manage subscribers' from the administrator dashboard.



- Enter the employee's first name, last name, SSN or ITIN, or SSN. Select 'Search'.



- Is the employee in Benefits 24/7?
 - If 'no', add them to Benefits 24/7 manually (see instructions in Chapter 3) Select 'Add new subscriber'. Enter the employees' information. After adding them, tell the employee to attempt to log in again.
 - If 'yes', go to step 4.

4. Is the information associated with the employee correct? (name, SSN or ITIN, date of birth, etc.)
 - If 'no', correct the information through the 'Eligibility' tab.

- If 'yes', confirm the information the employee entered in Benefits 24/7 to claim their account?
- The employee needs to correctly enter their last name, the last 4 of their SSN, and their birth date to claim their account.

The above steps allow the benefit administrator to troubleshoot Benefits 24/7 access issues associated with an employee claiming their account for the first time.

Once the employee has successfully claimed their account, they will be prompted to choose 3 security questions and provide answers.

Once completed the User Dashboard will open and the employee can make elections.

Release an old SAW account for an employee

Employees will need to create an account with Secure Access Washington (SAW) to log into Benefits 24/7. Employee's should use a personal email address to create their login to ensure if they change employers they can still access their account.

Once they have claimed their account within Benefits 24/7, their SAW account is tied to that member record. No other SAW account will be able to claim the record once it is tied to a SAW account without additional action being taken.

For example: The employee creates a SAW account, logs into Benefits 24/7 successfully, and makes their benefit elections.

The next time the employee wants to log into Benefits 24/7 and make changes (either for annual open enrollment or a special open enrollment event); however, the employee forgot their username and password for the SAW account they used to claim their record in Benefits 24/7 and they are unable to reset their password because they no longer have access to the email they used. The employee will need to create a new SAW account.

The issue when they create a new SAW account is that their record in Benefits 24/7 is tied to that previous SAW account.

After they create their new SAW account and attempt to log in, they will be prompted to enter their demographic information again.

If the employee enters their demographic information successfully, Benefits 24/7 will realize that a new SAW account is attempting to claim a record in the application and prompt them to answer their security questions.

If those questions are answered correctly, the old SAW account will be removed, and they will now tie their new SAW account to their record in Benefits 24/7.

If the employee cannot successfully answer their security questions, they will be directed to their benefit administrator to manually release their record in Benefits 24/7.

Here are those steps to release an account:

1. You are contacted by an employee who has previously successfully logged into benefits 24/7 and now cannot log in to their account.
2. Did this employee create a new SAW account because they could not access their old one?
 - If 'no', refer to the steps above and assist with the initial claiming process
 - If 'yes', log in to Benefits 24/7 with your benefit administrator log in, go to step 3.
3. Select on the 'Manage subscriber' tile and search for the employee. Search criteria may include the employee's first name, last name, the SSN or ITIN, or the last 4 of the SSN.
4. Verify the identity of the employee having the access issue.
5. Once you have confirmed the identity of the employee and verified that this is the issue preventing access select 'Disassociate this subscriber account?'. *Note: The option to disassociate the account will only display if the employee previously claimed their account.*

This action will release the old SAW account from the employee record. The employee will then need to go through the steps to claim their account again (entering in their demographic information, selecting, and providing answers for their security questions).