Benefits Administrator's Manual

Chapter 2

Eligibility file, Billing file, Reports, Access, FSA/DCAP file, etc.
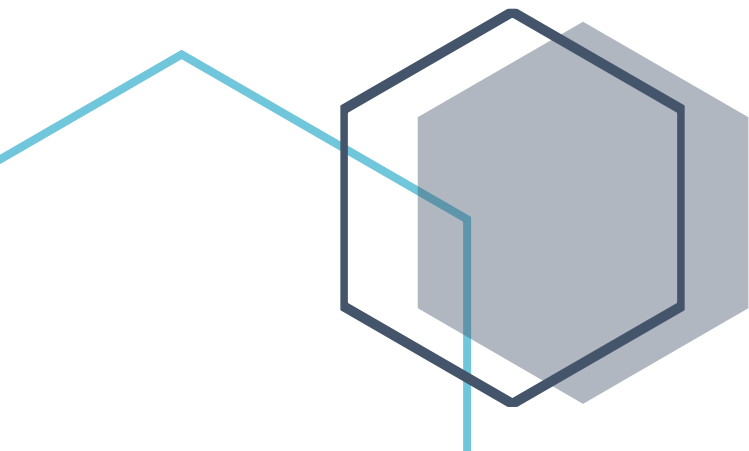
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Manage access to SEBB My Account

Requires SEBB My Account Admin access rights granted by HCA.
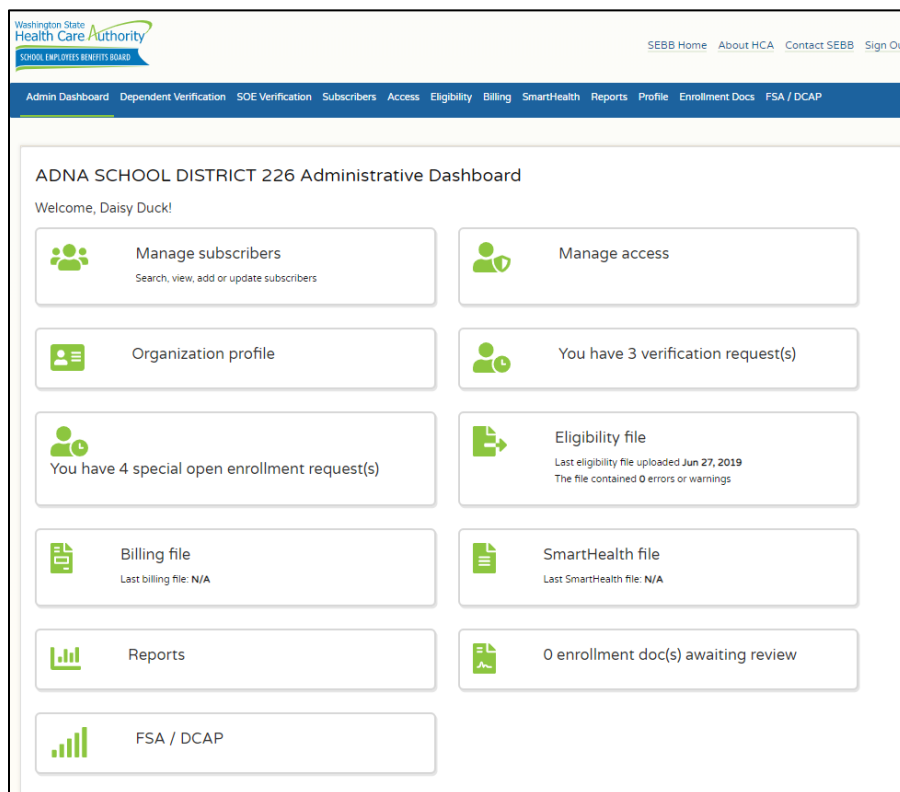

TIPS

When adding or updating permissions for benefits administrators, verify the organizations' contacts listed under the Organization Profile are also up to date. See the Organization Profile section of the manual for instructions to add, update or remove contacts.

The Health Care Authority (HCA) will grant Administrative (Admin) access to staff named by the SEBB Organizations' Superintendent. The Superintendent must complete the *SEBB Admin Appointment form* and forward it to the Health Care Authority (HCA*)* through HCA Support (secure messaging). Recommendation: At least one main contact and a back-up should be named. If an update is required, a new form must be completed and sent to HCA.

Once the Admin access is granted, the Admin has the ability to grant Access management, Edit, Finance, and Read Only access to other SEBB Organization benefit 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 in the system.

Granting access

1. Log into SEBB My Account. From the Administrative Dashboard, select the Manage access tile.

2. The Manage access page displays with two options:

- Manage application access, and

- Manage API access

Manage application access

3. To manage application access, choose 'Add system user'. A new line is added to the list.

4. Enter the first and last name of the benefits administrator.

5. Enter their work email address.

6. Select the checkbox under the permission to be granted.

- **Access management** – Allows a user to release an employee's account in the event an employee created a new SAW account because they couldn't access their old account. See the 'Troubleshooting employee access' section of this manual.

- **Edit** – Allows a user to add newly eligible employees, assist employees with benefit enrollment, approve or deny a special open enrollment event, update /change enrollment data on behalf of the subscriber, terminate coverage, upload an enrollment file, upload an eligibility file, and access reports.

- **Read Only** – Allows a user to view employee enrollment and eligibility data and access reports. Do not assign Read Only with any other permissions.
- **Finance** – Allows a user to download the billing file, upload and download the Medical FSA/DCAP files, download the SmartHealth file, and access reports.

7. Repeat the steps for each benefits administrator.

Change or remove access

1. Log into SEBB My Account. Select 'Manage access' from the Administrative Dashboard.

2. To remove permissions, uncheck the permissions next to the name of the user. While the change or removal of access is immediate, the line will remain visible for 30 days and then it will automatically be removed.

   To change permissions, first uncheck the permissions no longer needed and then check the new permissions.

Permissions at multiple SEBB organizations

If you manage multiple SEBB Organizations' eligibility, enrollment, etc., a drop-down menu will be available to access the different SEBB organizations. Permissions for multiple SEBB organizations must be given by the SEBB My Account Administrator for each individual SEBB organizations.
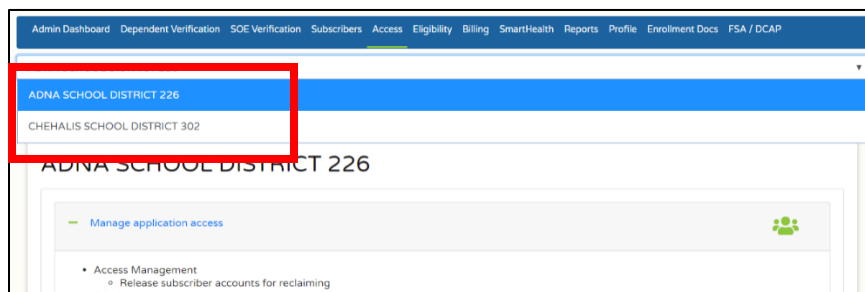
Manage API access

Managing API access requires SEBB My Account Admin access

The Application Process Interface (API) is a software intermediary that allows two applications to talk to each other. SEBB organizations can use the API to create new employee and dependent records in SEBB My Account or post updates to existing SEBB records from the SEBB organizations source system.

The file format used with the API must be pipe delimited. See the specifications document in the Appendix for file format information.

The body of the response will contain all errors generated by the record.

- 200 OK will be returned as a result of a successful create or update of a record.
- 400 Bad Request will be returned with records that don't meet data specifications.

Authorization is required to utilize the API function. Refer to the specifications document for additional information.

Add the API Access (if determined necessary/required by the SEBB Org)

1. Choose the + to open the Manage API access section.
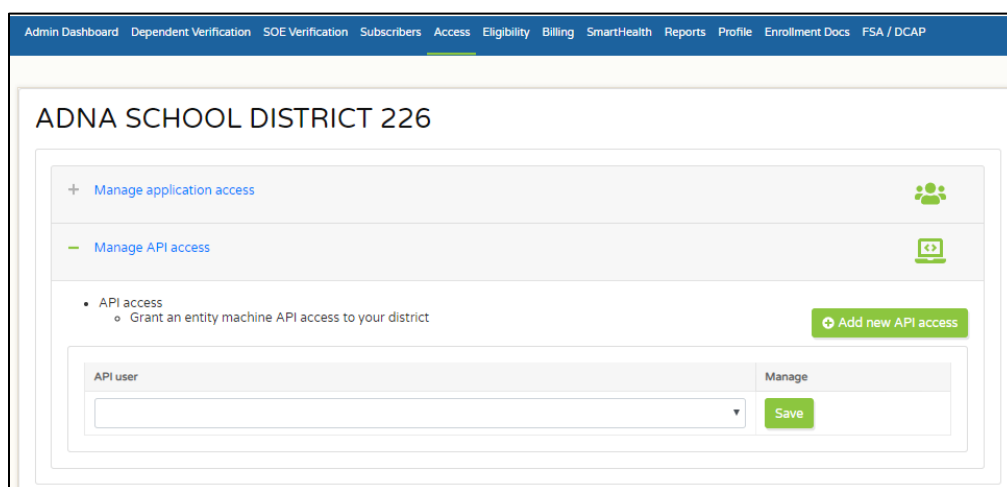
2. Choose 'Add new API access'. A new line is added to the list.

3. Enter the 'API user'.

4. Click 'Save'.

Note: If your SEBB organization is interested in this process, discuss with your IT department first, then contact Outreach and Training through HCA Support.

Organization profile

Updating the organizational profile requires SEBB My Account Admin access rights granted by HCA.

1. Log into SEBB My Account. From the Administrative dashboard select the Organization profile tile.

ADNA SCHOOL DISTRICT 226 Administrative Dashboard

Welcome, Daisy Duck!

Manage subscribers Search, view, add or update subscribers	**Manage access**
Organization profile	**You have 3 verification request(s)**
You have 4 special open enrollment request(s)	**Eligibility file** Last eligibility file uploaded Jun 27, 2019 The file contained 0 errors or warnings
Billing file Last billing file: N/A	**SmartHealth file** Last SmartHealth file: N/A
Reports	**0 enrollment doc(s) awaiting review**
FSA / DCAP	

2. Information about the SEBB organization is displayed.

Updating the SEBB organization information

3. The OSPI number, Federal tax ID, HCA code, SEBB organization name, Effective date, and the Physical address will be pre-populated the first time you log in. Verify the information is correct.

4. If any information in the greyed out fields requires updating, contact Outreach and Training through HCA Support with the correct information.

5. Update any information in the fields that are not greyed out.

6. If there are different addresses for billing, mailing, and shipping, add the addresses under the appropriate header. If the main address is correct in all instances, select the 'Same mailing/shipping/billing address checkbox.

7. If you made changes, click 'Submit Changes'.

Update first day of school

Update the first day of school no later than August 1 of each school year.

If the SEBB organization has multiple first days of school, enter the latest date. For example, the high school and middle schools start September 4, but the elementary schools start September 9, enter September 9 as the first day of school.

Educational Service Districts (ESDs) enter the first working day in September.

1. From the Organization profile page, enter the date of the first day of school and for ESDs the first working day of September in the 'First day of school' field. If there is more than one first day of school within the district, enter the latest date.

2. The 'First day of school' should be updated each year, no later than August 1.

3. Click, 'Submit changes'.

Add/update contact information

The contact information is used by HCA Outreach and Training, Accounting, and Customer Service to coordinate coverage for the SEBB Organization employees and terminated employees for SEBB Continuation Coverage booklet mailings.

There are four roles to select from:

- Benefit Specialist
- Insurance/ Billing
- Payroll
- 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. From the Organizational profile page, click the 'Add contact' button.

2. Select 'New contact'.

3. Enter the contact information.

4. If the address is the same as the address listed in the organizational profile above, select the 'Address same as agency physical address' checkbox. The address from above will populate the fields.

5. Select the checkbox(s) next to the type of contact, Benefit Specialist, Insurance/Billing, Payroll, and Superintendent. You may select multiple roles for the same person.

6. Repeat the above steps for each contact.

7. Select 'Submit Changes'.

Remove a contact

1. From the Organizational profile page, click the grey bar with the contact to be removed.

2. Click 'Remove contact'. The contact record is removed.

3. Click 'Submit changes'.

Eligibility file

Uploading the eligibility file requires Admin or Edit access.

SEBB organizations have the ability to import eligible employees and their dependents into SEBB My Account. The expected file format is pipe-delimited ('|') csv (comma separated values) or txt (text file). Employees and dependents must be uploaded separately, as the file format is different for each.

Eligibility file uploads are for newly eligible employees and dependents only. If you upload a file that contains information that has already been uploaded in SEBB My Account, the duplicate records will error out.

Determining eligibility

The first step to creating the eligibility file to upload to SEBB My Account is to determine employees' eligibility for the employer contribution.

There are several things that need to be considered when determining eligibility of your employees:

- Include all hours anticipated to be worked by the employee in their capacity as a school employee.
- Consider all hours anticipated to be worked as a school employee from the beginning of the school year.* Even though SEBB benefits are effective January 1, 2020, eligibility is based on the entire 2019-2020 school year.
- Employees may stack (include) hours from multiple positions within one SEBB organization to establish eligibility.
- Eligibility is determined solely by the criteria that most closely describes the school employee's work circumstances.

School year is defined as September 1 through August 31.

The recommended process is to separate employees into three categories: Eligible, Ineligible and It's complicated.

Eligible/ineligible category:

To move employees into the eligible or ineligible category, start by asking yourself the following questions:

1. Will the employee be working as a school employee in multiple positions in your organization? *(Do not include hours the employee may work at other SEBB Organizations.)*

    Yes or No.

    If the answer is 'Yes', include all anticipated work hours in the determination.

2. Do you anticipate the employee will work at least 630 hours for the 2019-2020 school year?

    Yes or No.

    If the answer is 'Yes', the employee is eligible for SEBB Program benefits.

    If the answer is 'No', go to question #3.

3. Did the employee work at least 630 hours in each of the previous two school years? and

    Is returning to the same type of position or combination of positions with the same organization?

    Yes or No.

    If the answer is 'Yes' to both questions, the employee is presumed eligible for SEBB Program benefits.

    If the answer is 'No' to one or both questions, the employee is not eligible at this time. Monitor these employees for eligibility throughout the school year.

A SEBB organization rebuts this presumption by notifying the employee, in writing, of the specific reasons why the school employee is not anticipated to work at least 630 hours in the current school year and how to appeal the eligibility determination.

These employee could become eligible based on:

1. The employee's work pattern is revised in such a way that they are now anticipated to work 630 hours for the year. Or,

2. The employee actually works 630 hours in the school year.

It's complicated category:

In some cases, it may be difficult to determine whether some employees meet the eligibility criteria. In these cases, additional analysis is needed. Contact SEBB Outreach and Training through HCA Support (secure messaging) or by phone 1-800-700-1555 for assistance in making the determination.

Mid-year hires:

Employees hired during the school year present another challenge. The employee may not be anticipated to work at least 630 hours in this school year, because of the time of the year they are hired. However, the employee is anticipated to work at least 630 hours in the next school year.

In these situations:

- If the employee is a 9-10 month employee and is anticipated to be compensated for at least 17½ hours per week in 6 of the last 8 weeks counting backward from the week that contains the last day of school.

- If the employee is a 12-month employee and is anticipated to be compensated for the at least 17½ hours per week in 6 of the last 8 weeks counting backward from the week that contains August 31, the last day of school year.

If the employee meets the above criteria, the employee is eligible for SEBB Program benefits.

Reference: WAC 182-31-040

Locally negotiated eligibility:

Eligibility is determined based on the negotiated work hours of no less than 180 hours and no more than the minimum hours to meet SEBB eligibility with the particular collective bargaining unit, group of non-represented, etc.

Only employees whose services are substantially all in the performance of essential governmental functions, but not in the performance of commercial activities, whether or not those activities qualify as essential governmental functions may be considered.

A SEBB Organization providing SEBB benefits to a group of school employees under this section must notify the SEBB Program each time the CBA is negotiated.

Reference: WAC 182-30-130

Create the eligibility file

Create the eligibility file using the specification document included in the Appendix of the manual.

TIPS The specifications for the employee file and the dependent file are different. Create and upload the files separately based on the specifications.

Upload the eligibility file

1. Log into SEBB My Account. From the Administrative dashboard select the 'Eligibility file' tile.

Admin Dashboard	Dependent Verification	SOE Verification	Subscribers	Access	Eligibility	Billing	SmartHealth	Reports	Profile

Aberdeen School District

Eligibility File Upload

Last eligibility file uploaded: Mar 18, 2019

The file contained 5 errors or warnings.

Select files...

Allowed file types: **csv, txt**

Upload Date	First Name	Last Name	SSN	Response	Column	Row	Message
Monday, March 18, 2019 at 10:37:11 AM GMT-07:00	0001, ShortRecord Sebb	ShortRecord	XXX-XX-0001	Error	Marital Status	0	Marital status must be M (for married) or S (for single).
Monday, March 18, 2019 at 10:37:11 AM GMT-07:00	0001, ShortRecord Sebb	ShortRecord	XXX-XX-0001	Error	County	0	The county code is invalid.
Monday, March 18, 2019 at 10:37:11 AM GMT-07:00	0003, NoMarrDate Sebb	NoMarrDate	XXX-XX-0003	Error	Marriage Date	1	Provide marriage date if marital status is M.
Monday, March 18, 2019 at 10:37:11 AM GMT-07:00	0003, NoMarrDate Sebb	NoMarrDate	XXX-XX-0003	Error	County	1	The county code is invalid.
Monday, March 18, 2019 at 10:37:11 AM GMT-07:00				Error		2	The number of expected columns is 29. This row is empty. This row will not be processed.

2. Click 'Select files...'. The Windows 'Open' dialog box displays. Use the dialog box to select the file to be uploaded. Click 'Open'.

3. The file will upload the data into SEBB My Account. The file upload date and time will display, and the file is in queue to process.

4. Once the file is processed, the tile will display the number of errors, if any. File processing times may vary, but not to exceed 24 hours.

5. Check the error log. There is an option to export the error log to Excel. If you do not see the option, go back to the Admin Dashboard, and then click the 'Eligibility file' tile.

6. Make any corrections to the data in your payroll system and resubmit only the records included on the error file. There will be an option to export the error report to Excel.

The 'Eligibility file' tile shows the most recent upload's date and time, and whether or not the file contained errors.

Records that failed to upload due to error(s), will be visible by clicking on 'Eligibility file' tile. The record with error(s) will display, and an explanation as to why the record resulted in error is in the Message column.

Correct the errors in your system of record. Create a new file extract and upload the new file to load resolved records.

If the file contains no errors, SEBB My Account will display a message: 'The file contained no errors'.

Invoicing – billing file

Downloading the billing file requires Admin or Finance access.

> **TIPS**
>
> Recommendation: Reconcile the invoice you receive from HCA Accounting to information you have in your payroll system every month to ensure the two systems are in sync and your invoice will be correct.
>
> Refer to the HCA Accounting Manual on the SEBB Benefits Administrator's website for more information.

Invoicing runs on the evening of the 15th of every month unless the 15th is a weekend. Refer to the Invoicing Schedule on the SEBB Benefits Administrator's website for billing dates.

1. Log into SEBB My Account. From the Administrative dashboard select the 'Billing file' tile.

ADNA SCHOOL DISTRICT 226

Billing Files

Selected Billing File

`600 D02-BillingFile-April.txt` ▾

[x] Export to Excel

Age...	Last...	First...	MI	SSN	Tran...	Tran...	Cov...	Bat...	Hea...	Den...	Visi...
1	Corey	Ixer	S	8794317 77	12/20/2 0	0	202001	2694602 0	QNLH	ATAC	RTZD
2	Bianka	Rannie	P	7668754 05	03/05/2 0	8	202001	3754060 9	MHAW	AGLF	MXRU
3	Laney	Twomey	T	8762625 64	10/12/2 0	1	202001	1414466 2	LUAD	IGFL	NDWE
4	Athene	Mewe	I	3285384 49	12/19/2 0	8	202001	7252798 3	QIQA	BCSO	SXRX
5	Elisabett	Clapp	M	1521677	10/22/2	1	202001	6194995	ZJHM	ZRQT	GQZO

2. The billing file will be available the morning after invoicing runs each month.

3. Click 'Export to Excel' to save the file for reconciliation.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Employer Agency Code	Employee Last Name	Employee First Name	Employee MI	SSN/ITIN	Transaction Date	Transaction Type	Coverage Period	Batch Number	Health Carrier Code	Health Family Composition	Dental Carrier Code	Dental Family Composition	Transaction Amount	Employee Health Premium Amount
2	600D02	TOTAL			000000000	0		201901						00,000.00	00,000.00
3	600D02	COREY	IXER	S	879431777	20191202	I	201901	INV0120	V	EE AND SPOUSE	EE AND SPOUSE	EE AND SPOUSE	$1,140.00	00,224.00
4	600D02	BLANKA	RANNIE	P	766875405	20191202	I	201901	INV0120	V	EE AND SPOUSE	EE AND SPOUSE	FULL FAMILY	$1,190.00	00,224.00
5	600D02	LANEY	TWOMEY	T	876262564	20191202	I	201901	INV0120	V	EE ONLY	EE ONLY	EE ONLY	$1,023.00	00,107.00
6	600D02	ATHENE	MEWE	I	328538449	20191202	I	201901	INV0120	V	EE ONLY	FULL FAMILY	FULL FAMILY	$1,023.00	00,107.00
7	600D02	ELISABETT	CLAPP	M	152166721	20191202	I	201901	INV0120	V	FULL FAMILY	FULL FAMILY	FULL FAMILY	$1,220.00	00,304.00

4. Review the HCA Accounting invoice for accuracy and ensure that their billing correctly matches the eligibility information you have in your system. Invoices may include amounts due from previous coverage periods, which are displayed in the coverage period column.

There will be up to 6 months of billing files available.

SmartHealth file

Downloading the SmartHealth file requires Admin or Finance access.

A file will be available at the beginning of each January that identifies the employees who earned the SmartHealth incentive for 2020. This information is used for W-2 reporting.

To earn the wellness incentive for 2020, employees must complete their well-being assessment on the SmartHealth portal between October 1 and November 15, 2019. Employees who complete the well-being assessment during this time will earn $50 off their deductible or $50 will be added to their HSA (Health Savings Account) if they are enrolled in a HDHP (high deductible health plan). Employees will see the reduction in the deductible or the deposit into their HSA in January.

Exception: SEBB employees who were enrolled in PEBB coverage in 2019 and earned the wellness incentive for 2020 will receive the PEBB wellness incentive in January 2020. The amount earned will be $125 off their deductible or $125 added to their HSA, if they are enrolled in a HDHP. The incentive will be added at the end of January with the employer contribution as one lump sum.

1. Log into SEBB My Account. From the Administrative dashboard select 'SmartHealth File'.

2. Click on 'Export to Excel' to save the file. The data is used to report on the employee's W-2. See the W-2 Reporting guidance on the SEBB [Benefits Administrator's website](#).

Medical Flexible Savings Arrangement (FSA)/Dependent Care Assistance Program (DCAP)

Download/upload of Medical FSA/DCAP files requires Admin or Finance access.

Newly eligible employees – Newly eligible employees must complete a paper form and submit the form to their benefits administrator. The benefits administrator completes the employer portion of the form and forwards the form to Navia Benefit Solutions.

Annual open enrollment – During annual open enrollment, employees may enroll in the Medical FSA and/or DCAP through the Navia Benefit Solutions portal or submit an open enrollment form. The employee may send the form directly to Navia Benefit Solutions during annual open enrollment.

Special open enrollment – Depending on the life event, enrollment and changes may be allowable to the FSA/DCAP. The employee must complete the Change in Status form and submits the form to their benefits administrator. The benefits administrator completes the employer portion of the form and forwards the form to Navia Benefit Solutions. Refer to Policy 45-2, Addendum 45-2A.

When open enrollment ends, Navia Benefit Solutions will send the enrollment report to HCA. HCA will upload the report to SEBB My Account. The file contains the total employee requested contribution amount and the per paycheck deduction amount based on 12 paychecks per year. Work with Navia Benefit Solutions directly if you have employee's that do not receive 12 paychecks per year and need to adjust the per paycheck amount.

Download the Enrollment File

1. Log into SEBB My Account. From the Administrative dashboard select the 'FSA/DCAP' tile.

2. Download the enrollment file.

3. Import/enter the payroll deduction for the employee in your payroll system.

Upload payroll deductions file

1. One week prior to the pay date, upload a file that includes the actual payroll deduction taken for that pay period. Use the approved Navia Benefits Solutions file format. Name the file SWB.AgencySubAgency.Date. The Agency sub agency code is the HCA code assigned to your SEBB organization. (600 XXX).

2. Click 'Select files…' to upload the file to SEBB My Account. Send payment to HCA. Refer to the accounting manual for more information on payment.

3. Navia Benefits Solutions will receive the file and apply the deducted amount to the employee's account.

4. Navia Benefit Solutions will contact you if there are any discrepancies in the file.

Reports

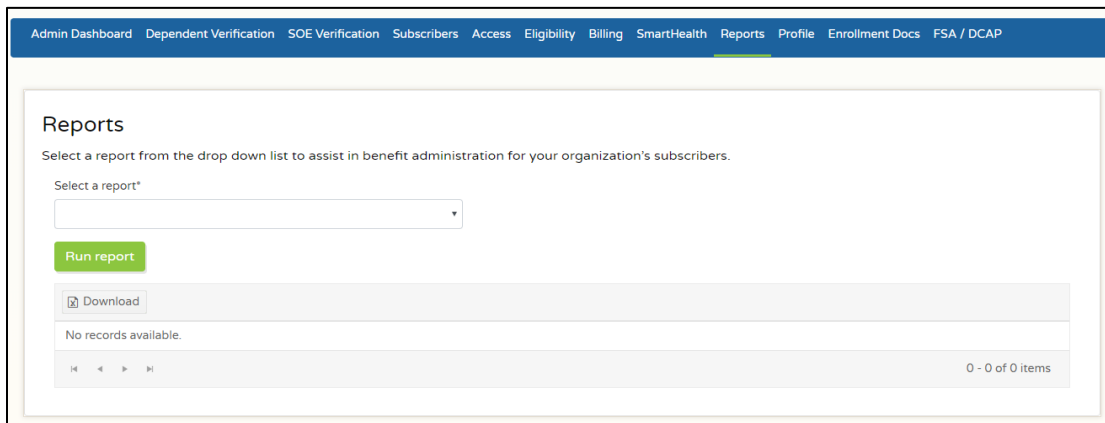Running reports requires Admin, Edit, Read only, or Finance access.

Reports are available to help manage employees and their enrollment.

Available reports include:

- Benefit election status by employee – This will report will return the names of the employees who have made their enrollment elections and employees who have not made their elections. The search is based on the date range that you choose.
- Default benefit elections – This report will return employees who have been defaulted into benefits due to non-response. The search is based on the date you choose.
- Dependent verification status – This report will return the status of dependent verification showing approved, denied, and pending. The search is based on the date range that you choose. *Note: The HCA auditors will conduct auditing review of dependent verification completed by the third-party vendor and the SEBB organizations. Approvals or denials may change based on their determination.*
- Eligibility terminations – This report will return the eligibility status of the employee (e.g., eligible and terminated employees). The search is based on the date range that you choose.
- Represented employees – This report returns a list of the represented and non-represented employees. The search criteria can be set to show represented, non-represented, or both.

Run a report

1. Log into SEBB My Account. From the Administrative dashboard select the 'Reports' tile.

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

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

4. Enter the criteria, based on the selected report.

5. Click 'Run report'.

6. Click 'Download' to export the report into Excel.

Troubleshooting employee access

Releasing employee account requires SEBB My Account Admin or Access Management access.

As a benefit administrator you will be contacted by your SEBB eligible (or even non-SEBB eligible employees) inquiring about why they cannot access SEBB My Account. When you are contacted if you follow these instructions you will be able to resolve almost every issue they will have.

Employee attempting to claim their account (login) for the first time

1. You receive notification that an employee has an issue accessing SEBB My Account. The notification may be via phone, email, in-person, etc.

2. Is the employee eligible for SEBB Program benefits?

   - If 'yes', continue to step 3.

   - If 'no', let the employee know they are not eligible for SEBB benefits.

3. Is the employee's eligibility information in SEBB My Account?

   To determine if the employee is in SEBB My Account:

   - Log into SEBB My Account with your benefits administrator account. (See Chapter 1)

   - Select 'Manage subscribers' from the administrator dashboard.

- Enter the search criteria associated with the person you are looking for and click 'Search'.

- Is the employee in SEBB My Account?

  - If 'no', add them to SEBB My Account manually. Click '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, date of birth, etc.)

- If 'no', correct the information through the 'Employment' tab.

- If 'yes', confirm the information the employee is entering into SEBB My Account 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 SEBB My Account 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.

Release an old SAW account for an employee

Your employees will need to create an account with Secure Access Washington (SAW) in order to log into SEBB My Account. Once they have claimed their account within SEBB My Account, their SAW account is tied to that member record. No other SAW account will be able to claim this record once it is tied without additional action being taken.

For example: Open enrollment 2019, the employee creates a SAW account, logs into SEBB My Account successfully, and makes their benefit elections.

The next year the employee wants to log back in to SEBB My Account 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 SEBB My Account last year and they are unable to reset their password because they no longer have access to the email they used.

If they contact WaTech (the state agency that is responsible for Secure Access Washington), WaTech will advise them to create a new SAW account.

The issue when they create a new SAW account is that their record in SEBB My Account is tied to that former SAW account. This is where the security questions come in.

After they create their new SAW account and attempt to log in they will be prompted to enter their demographic information again (see troubleshooting steps associated with claiming an account if they do not get past this point).

If the employee enters their demographic information successfully, SEBB My Account 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 SEBB My Account.

The problem is when the employee cannot successfully answer their security questions.

When that happens they will be directed to their benefit administrator to manually release their record in SEBB My Account.

Here are those steps:

1. You are contacted by an employee who has previously successfully logged into SEBB My Account and now cannot log in to their account.

2. Did this employee create a new SAW account because they couldn't access their old one?

    - If 'no', refer to the steps above an assist with the initial claiming process

    - If 'yes', log in to SEBB My Account with your benefit administrator log in, go to step 3.

3. Click on the 'Manage subscriber' tile and search for the employee.

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 click the button indicated above 'Disassociate this subscriber 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).

Contact Center

A contact center will be available to help employees with questions, SEBB My Account log in, and enrollment. The contact center will be available as follows:

September 23 – 30: Monday to Friday 8 am to 5 pm

October 1 – November 15: Monday to Friday 7 am to 9 pm, Saturdays 10 am to 4 pm.

We will provide the phone number in September.