

<b>Type: System Enhancements</b>	<b>ID Number: SE 81</b>
<b>Date: March 30, 2012</b>	<b>Subject: Health and Insurance Screen Enhancements</b>

**Suggested Audience:**

All People First Users

**Details:**

System improvements are being made to the Health and Insurance screens within People First. The **enhancements will be implemented on April 7, 2012**, and include the following changes within the Health & Insurance tab:

**"Your Benefits" Screen**

- The following changes are being made to the "Your Benefits" screen selections. To access the "Your Benefits" screen, select "Current Benefits" in the My Quick Links, "Your Benefits" on the Health & Insurance Home Page or "Your Benefits" from the *Benefits* menu on the My Direct Reports page.
  - Remove current selections "Overview" and "Dependent Summary."
  - Retitle the selection "By Plan Type" to "Benefits Details by Plan Type."
  - Retitle the selection "As of Date" to "Benefits Details as of Date."
  - The following changes are being implemented to both the "Benefits Details by Plan Type" and "Benefits Details as of Date" screens.
    - Remove the column "Monthly Cost."
      - This field has always shown the current rate and does not consider rate change periods. Agencies should always access the Benefits Premium History screens (see below) to obtain rates for a specific coverage period.
    - Retitle "Plan Effective Date" to "Plan Participation Date."
      - This field shows the date the employee first obtained coverage with this carrier, without changing carriers or having a break in coverage. If an employee comes back to a previous carrier, this date will be the new coverage effective date.
    - Retitle "Coverage Date" to "Effective Date."
      - This field shows the effective date of the employee's last coverage change. This applies whether changing coverage levels, changing covered dependents within a coverage level or changing agencies.
    - Add a new field "Coverage Level Date."
      - This date represents the day the employee enrolled in the "Coverage Level" for this plan.
    - Add a new field "Pre-Tax Flag."
      - This field will contain an "x" if the employee's plan is pre-tax. If the plan was employer pay all, then "N/A" will be presented in this field. If post-tax, the field will be blank.

- Update "Coverage Level" field to make the coverage level within the field a hyperlink. Once selected, the employee's dependents for that plan, for the period shown on that row are displayed in a separate table (see screenshots below).
  - For the "Benefits Details by Plan Type" screen, to review dependents that are covered for a separate period, you must select the appropriate row in the table. For example, "Screenshot 1" below shows the record with an "Effective Date" of 06/06/2007 selected. For this row, the selected employee has both a spouse and a child covered. However, when you select the row with an "Effective Date" of 06/07/2005, only the Spouse was covered and is shown (Screenshot 2).
  - For the "Benefits Details as of Date" screen, to review dependents for a particular "Benefit Plan" (e.g., Health, Dental), select the coverage level for that "Benefit Plan" (Screenshot 3).
  - Currently you have to select either "View Details" to access a PDF presentation that contains the dependents or you have to access the "Dependent Summary" view to obtain this information.
- The data available when selecting the "View Details" button will contain the same information that is on the screen (as shown in the screenshots below). The PDF document that is generated when selecting "View Details" will only be required if the user wishes to print the information contained on the screen.

**Screenshot 1:** New "Benefits Details by Plan Type Table, when selecting the hyperlink for the "Coverage Level" for the row with an "Effective Date" of 06/06/2007.

**View Benefits Elections**

This screen may contain information that is confidential under state or federal law. Improper access or release of such information may be a violation of these laws.

Select Benefits View: Benefits Details By Plan Type ▾  
 Plan Details by Plan: Health ▾

Menu View

	Benefit Plan	Plan Participation Date	Coverage Level	Coverage Level Date	Pre-Tax Flag	Medical Underwriting	Effective Date	End Date
<input checked="" type="checkbox"/>	Capital Health Plan HMO	08/01/1999	Family	08/01/1999	X	N/A	06/06/2007	12/31/9999
<input type="checkbox"/>	Capital Health Plan HMO	08/01/1999	Family	08/01/1999	N/A	N/A	06/07/2005	06/05/2007
<input type="checkbox"/>	Capital Health Plan HMO	08/01/1999	Family	08/01/1999	N/A	N/A	11/01/2004	06/06/2005

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**Dependents --- Capital Health Plan HMO**

Dependent/Beneficiary Name	Participation Date	Relationship
My Spouse	08/01/1999	Spouse
My Child	08/03/2007	Child

View Details

**Screenshot 2:** New "Benefits Details by Plan Type" table, when selecting the hyperlink for the "Coverage Level" for the row with an "Effective Date" of 06/07/2005.

**View Benefits Elections**

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Select Benefits View: Benefits Details By Plan Type

Plan Details by Plan: Health

Menu View

	Benefit Plan	Plan Participation Date	Coverage Level	Coverage Level Date	Pre-Tax Flag	Medical Underwriting	Effective Date	End Date
<input type="checkbox"/>	Capital Health Plan HMO	08/01/1999	Family	08/01/1999	X	N/A	06/06/2007	12/31/9999
<input checked="" type="checkbox"/>	Capital Health Plan HMO	08/01/1999	Family	08/01/1999	N/A	N/A	06/07/2005	06/05/2007
<input type="checkbox"/>	Capital Health Plan HMO	08/01/1999	Family	08/01/1999	N/A	N/A	11/01/2004	06/06/2005

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**Dependents --- Capital Health Plan HMO**

Dependent/Beneficiary Name	Participation Date	Relationship
My Spouse	08/01/1999	Spouse

View Details

**Screenshot 3:** New "Benefits Details as of Date" table, when selecting the hyperlink for "Coverage Level".

**View Benefits Elections**

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Select Benefits View: Benefits Details As Of Date

Plan Details as of: 03/30/2012

Menu View

	Benefit Plan	Plan Participation Date	Coverage Level	Coverage Level Date	Pre-Tax Flag	Medical Underwriting	Effective Date	End Date
<input type="checkbox"/>	Basic Life Minnesota	01/01/2008	\$25,000	01/01/2008	N/A	N/A	01/01/2008	12/31/9999
<input checked="" type="checkbox"/>	Capital Health Plan HMO	08/01/1999	Family	08/01/1999	X	N/A	06/06/2007	12/31/9999
<input type="checkbox"/>	Medical Reimburse Acct	01/01/2007	\$3,000.00	01/01/2011	X	N/A	01/01/2011	12/31/9999
<input type="checkbox"/>	Optional Term Minnesota	01/01/2011	5 times salary	01/01/2011		N/A	01/01/2011	12/31/9999

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**Dependents --- Capital Health Plan HMO**

Dependent/Beneficiary Name	Participation Date	Relationship
JAIME COX	08/01/1999	Spouse
TIMOTHY COX	08/03/2007	Child

View Details

### **"Benefit Premium History" Screen**

- The following changes are being made to the "Benefit Premium History" screens when selecting the "Benefit Premium History" link on the Health & Insurance Home Page or the "Premium History" link in the *Benefits* dropdown on the My Direct Reports page.
  - Add a new "Select Premium History View" dropdown containing the following selections:
    - "Two Years of Under/Over History"
      - This view is an additional tool to allow agencies to identify if a particular employee has either an Under or Overpayment for any of their Health & Insurance enrollments.
      - This view looks at the current coverage month, plus the previous 23 coverage months, that have either an Under or Overpayment.
      - Only plans with an Under or Overpayment are shown and only for the coverage months with an Under or Overpayment (Screenshot 4).
      - The "Total" row will show the total Under or Overpayment for the employee.
    - "Two Year Premium History by Plan Type"
      - This view will allow agencies to access the premium history for a specific plan for the past two years.
      - This view looks at the current coverage month, plus the previous 23 coverage months.
      - This view is plan specific. Once you select this view, you will then have to select the plan to view.
      - The "Total" row will show the total Under or Overpayment for the employee.
    - "Premium History by Coverage Month"
      - This view is the same as the current view in production.
      - Once you select this view, you will then have to select the coverage month you want to view.
      - This view will list all plans for the selected coverage month.
      - The "Total" row will show the total Under or Overpayment for the employee for the selected coverage.

### Screenshot 4: New "Two Years of Under/Over History" screen.

**Premium History**

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Select Premium History View: Two Years of Under/Over History

[Menu](#) [View](#)

<input type="checkbox"/>	Benefit Plan	Coverage Month	EE Due	EE Paid	EE Variance	ER Due	ER Paid	ER Variance
<input checked="" type="checkbox"/>	Capital Health Plan HMO	FEB-2012	30.00	0.00	-30.00	1,213.34	0.00	-1,213.34
<input type="checkbox"/>	Basic Life Minnesota	FEB-2012	0.00	0.00	0.00	4.54	0.00	-4.54
<input type="checkbox"/>	Optional Term Minnesota	FEB-2012	42.10	0.00	-42.10	0.00	0.00	0.00
<input type="checkbox"/>	<b>TOTAL</b>				<b>-72.10</b>			<b>-1,217.88</b>

[View Details](#)

### Screenshot 5: New "Two Year Premium History by Plan Type" screen.

**Premium History**

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Select Premium History View: Two Year Premium History by Plan Type

Premium History by Plan: Health

[Menu](#) [View](#)

<input type="checkbox"/>	Benefit Plan	Coverage Month	EE Due	EE Paid	EE Variance	ER Due	ER Paid	ER Variance
<input type="checkbox"/>	Capital Health Plan HMO	FEB-2012	30.00	0.00	-30.00	1,213.34	0.00	-1,213.34
<input checked="" type="checkbox"/>	Capital Health Plan HMO	JAN-2012	30.00	30.00	0.00	1,213.34	1,213.34	0.00
<input type="checkbox"/>	Capital Health Plan HMO	DEC-2011	30.00	30.00	0.00	1,213.34	1,213.34	0.00
<input type="checkbox"/>	Capital Health Plan HMO	NOV-2011	30.00	30.00	0.00	1,213.34	1,213.34	0.00
<input type="checkbox"/>	Capital Health Plan HMO	OCT-2011	30.00	30.00	0.00	1,213.34	1,213.34	0.00
<input type="checkbox"/>	Capital Health Plan HMO	SEP-2011	30.00	30.00	0.00	1,213.34	1,213.34	0.00
<input type="checkbox"/>	Capital Health Plan HMO	AUG-2011	30.00	30.00	0.00	1,213.34	1,213.34	0.00
<input type="checkbox"/>	Capital Health Plan HMO	JUL-2011	30.00	30.00	0.00	1,213.34	1,213.34	0.00
<input type="checkbox"/>	Capital Health Plan HMO	JUN-2011	30.00	30.00	0.00	1,213.34	1,213.34	0.00
<input type="checkbox"/>	Capital Health Plan HMO	MAY-2011	30.00	30.00	0.00	1,213.34	1,213.34	0.00
<input type="checkbox"/>	Capital Health Plan HMO	APR-2011	30.00	30.00	0.00	1,213.34	1,213.34	0.00
<input type="checkbox"/>	Capital Health Plan HMO	MAR-2011	30.00	30.00	0.00	1,213.34	1,213.34	0.00
<input type="checkbox"/>	Capital Health Plan HMO	FEB-2011	30.00	30.00	0.00	1,213.34	1,213.34	0.00
<input type="checkbox"/>	Capital Health Plan HMO	JAN-2011	30.00	30.00	0.00	1,213.34	1,213.34	0.00
<input type="checkbox"/>	Capital Health Plan HMO	DEC-2010	30.00	30.00	0.00	1,154.14	1,154.14	0.00
<input type="checkbox"/>	Capital Health Plan HMO	NOV-2010	30.00	30.00	0.00	1,154.14	1,154.14	0.00
<input type="checkbox"/>	Capital Health Plan HMO	OCT-2010	30.00	30.00	0.00	1,154.14	1,154.14	0.00
<input type="checkbox"/>	Capital Health Plan HMO	SEP-2010	30.00	30.00	0.00	1,154.14	1,154.14	0.00
<input type="checkbox"/>	Capital Health Plan HMO	AUG-2010	30.00	30.00	0.00	1,154.14	1,154.14	0.00
<input type="checkbox"/>	Capital Health Plan HMO	JUL-2010	0.00	0.00	0.00	1,184.14	1,184.14	0.00
<input type="checkbox"/>	Capital Health Plan HMO	JUN-2010	0.00	0.00	0.00	1,184.14	1,184.14	0.00
<input type="checkbox"/>	Capital Health Plan HMO	MAY-2010	0.00	0.00	0.00	1,127.74	1,127.74	0.00
<input type="checkbox"/>	<b>TOTAL</b>				<b>-30.00</b>			<b>-1,213.34</b>

[View Details](#)