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CONCORDIA PLANS

Employer Portal – Administrative User Guide

Security Role: Invoice Administrator

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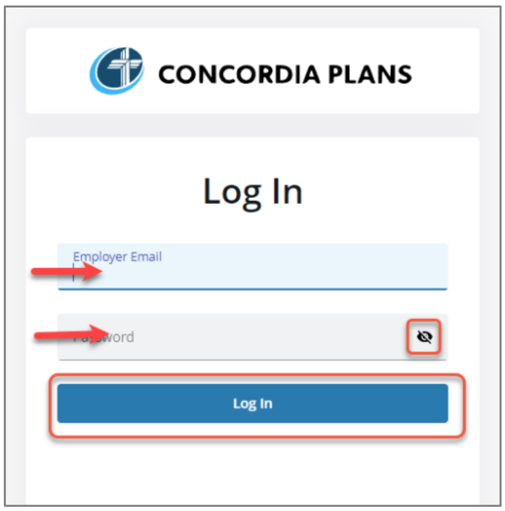
Basic Navigation

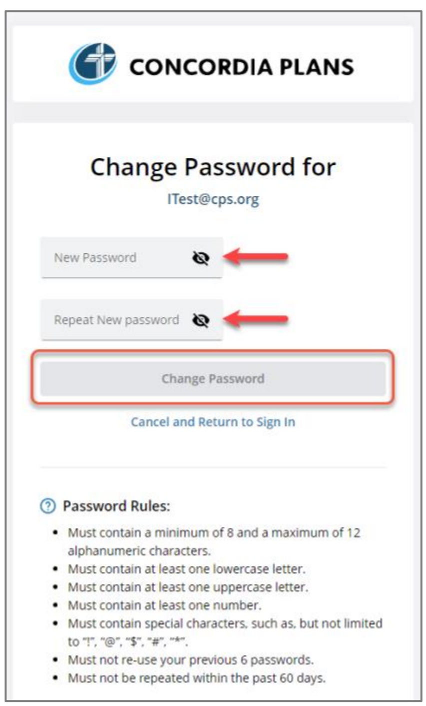
Logging In

Concordia Plans must set up all Plan Administrators for access to the Employer Portal. Contact CPS at 888-927-7526 or info@concordiaplans.org to request portal access for your ministry. On your first log in, you will need to reset your password. Follow the steps below to reset your password and log into the Employer Portal.

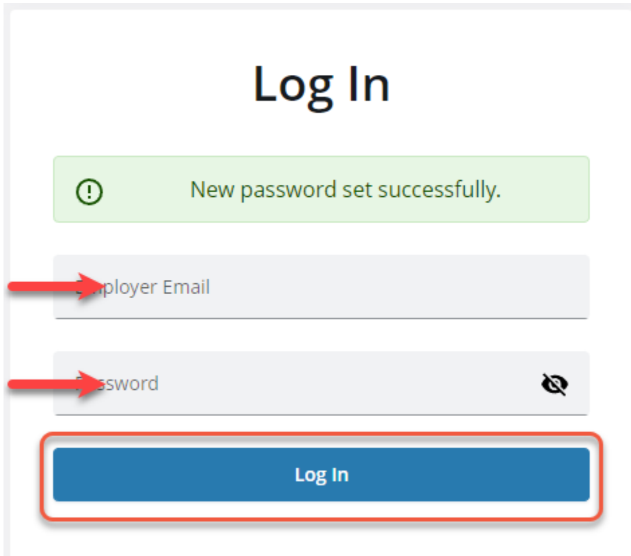
1. Go to www.ConcordiaPlans.org/EmployerPortal to access the login page.
   - Enter your:
     - **Employer Email**: Email address you used to register for the Employer Portal.
     - **Password:** Temporary password provided by CPS.
   - Click **Log In**.



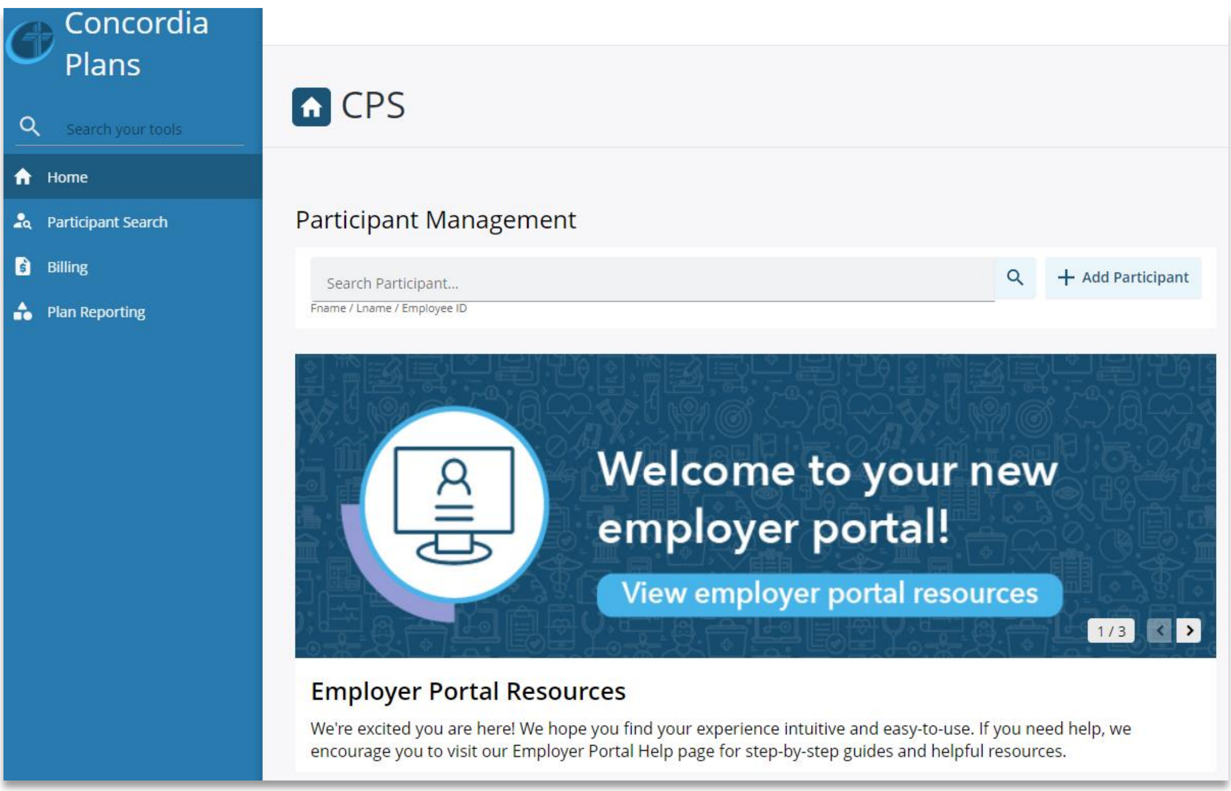
2. Enter a new password of your choice following the password rules listed on the screen, then click **Change Password.**



3. A green confirmation will alert you that your password has been set. You can now log into the site by entering your email address, your new password and clicking **Log In**.



4. The Employer Portal Home screen displays. You can now use the Employer Portal.

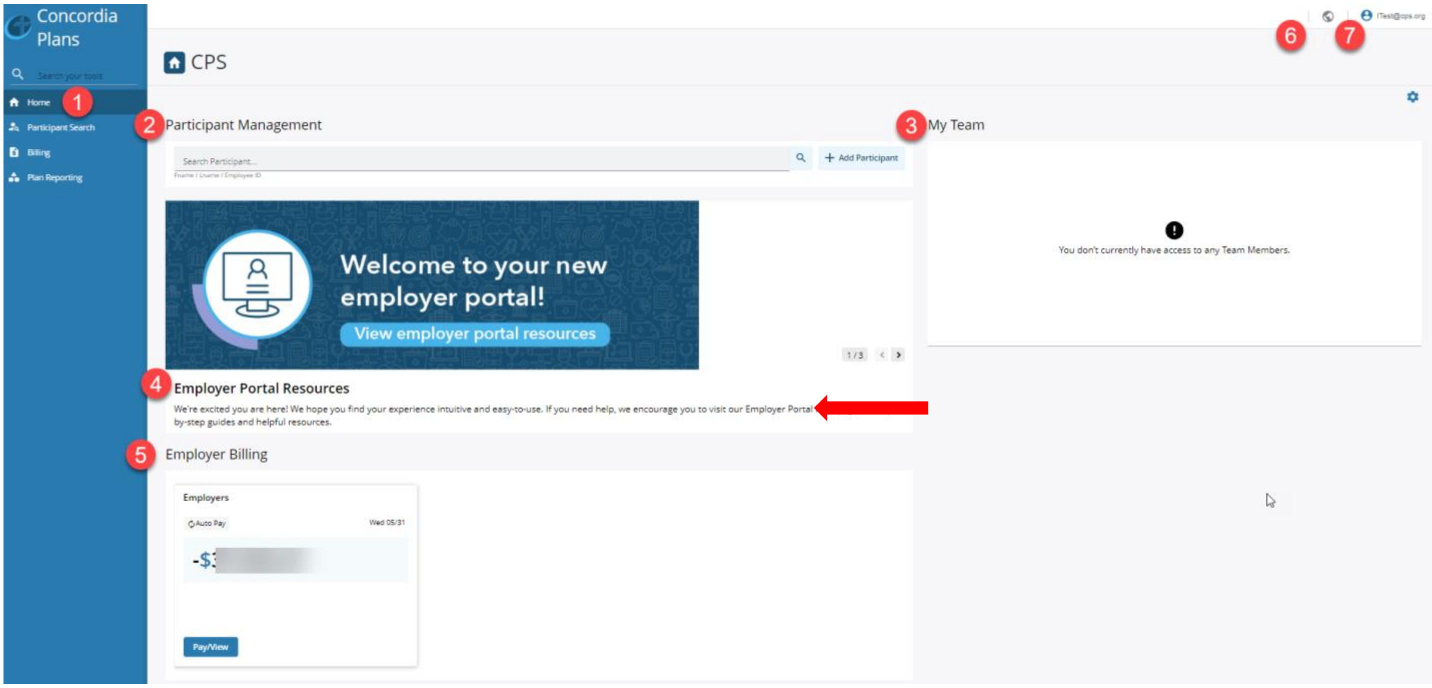


Forgotten Password Recovery

- Contact CPS at 888-927-7526 or info@concordiaplans.org to reset your password.
- CPS will provide you with a temporary password. Follow the Logging In instructions to reset your password.

Home

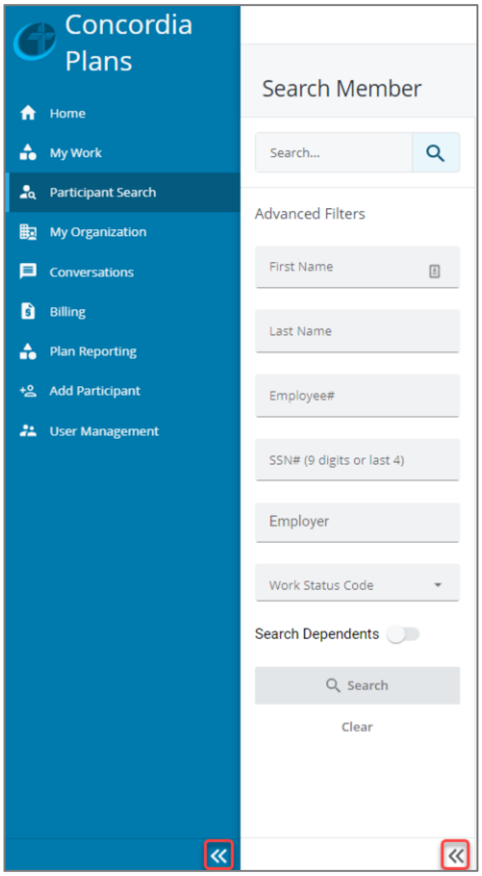
The options a user can see on the Home screen vary based on the administrator’s access level. As an **Invoice Administrator**, you will see the options displayed below.



1. **Left Navigation Menu:** Links to different places within the Employer Portal. The options you see in the left navigation menu vary based on an administrator’s user access level. As an **Invoice Administrator** you will see the options listed below.

Some options, such as **Participant Search**, will display a white sub-menu to the right. Use the **<<** icons to collapse the menus. Once collapsed, you can also use the **>>** to expand and view the menus.

Collapse:



Expand (found in bottom left corner):

The Home screen also contains multiple small sections, referred to as *cards*. These cards provide immediate access to many of the functions contained in the left navigation menu. The cards listed on the home screen are:

2. Participant Management: Search for members by name (First or Last) Social Security number or CPS member ID.

3. **My Team:** This is where an admin would view users (ie, portal admins) in your organization with access to the Employer Portal. The Invoice Admin cannot access this information, therefore you will see a message stating that you cannot see Team Members. Contact CPS if you have questions about your organization's portal users.

4. Employer Portal Carousel: Access helpful resources for the Employer Portal and benefits administration. The content in the carousel is subject to change and highlights timely information and resources. Use the **<** and **>** icons to scroll through the available pages and click anywhere in that carousel image to access that page.

5. Employer Billing: View a quick summary of your balance due and submit electronic payments. Additional details regarding Employer Billing are included in a later section.

In the upper right corner of the home screen, you will find additional functions within the Employer Portal.

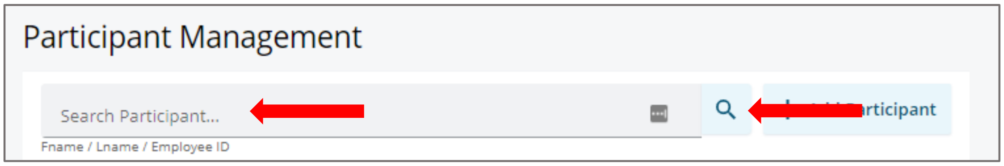
6. Globe Icon: Click the icon to access the Concordia Plans website.

7. User Name and Account Menu: Click your user name to access a drop-down menu of account options, such as sign out, change your password and view your login history.

Participant Search

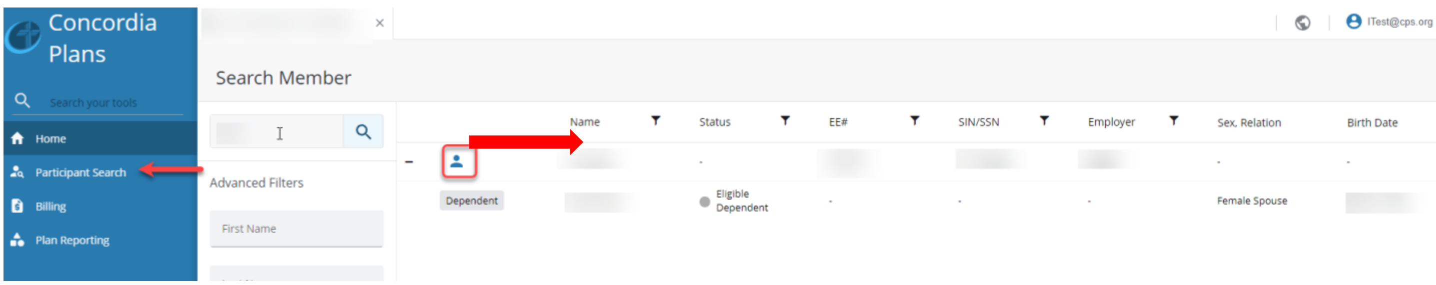
In the Employer Portal, members are referred to as Participants.

To view workers at your ministry, use the **Participant Search** function.



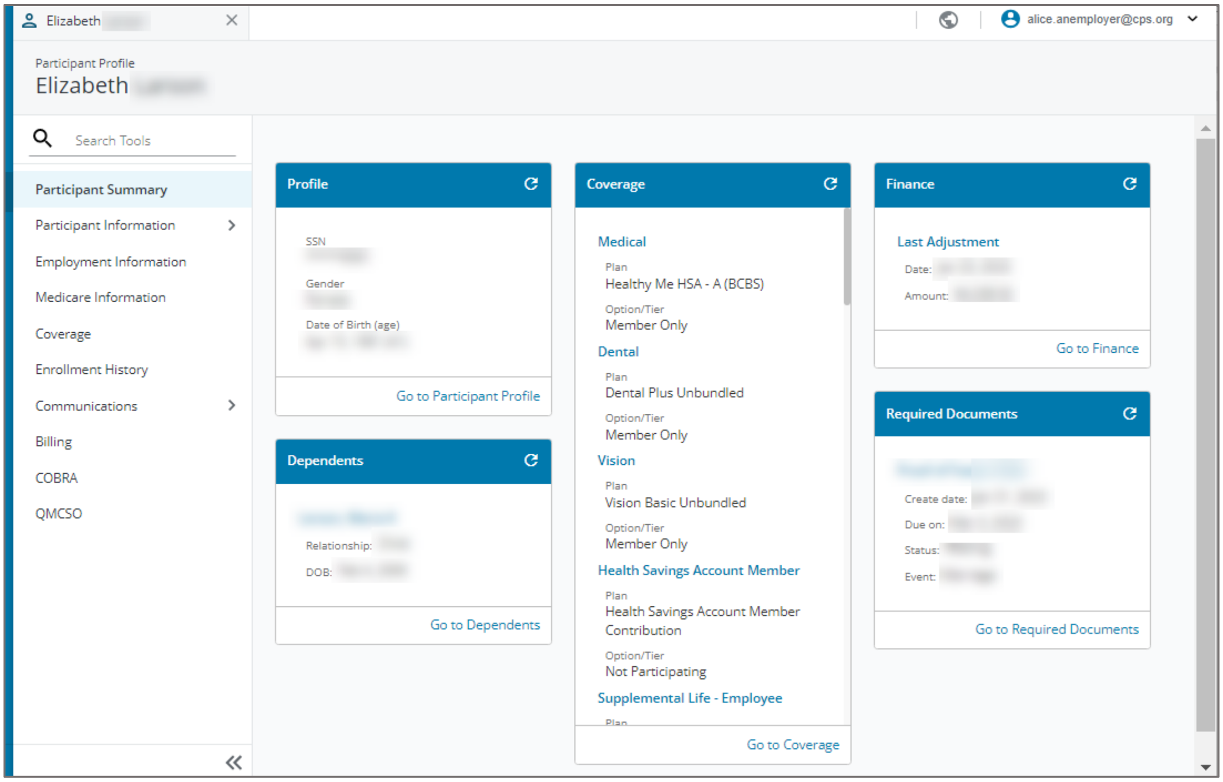
1. Type a member's name (first, last or both), Social Security number or CPS Member ID number into the **Search Participant** field.

2. Click the **magnifying glass** icon or press the Enter key to begin your search.
   The Search Member screen displays, with the member record available for selection.

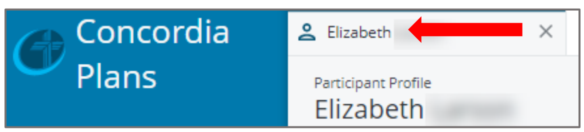


Members and dependents who match the search criteria will be displayed. Members are indicated with a person icon.

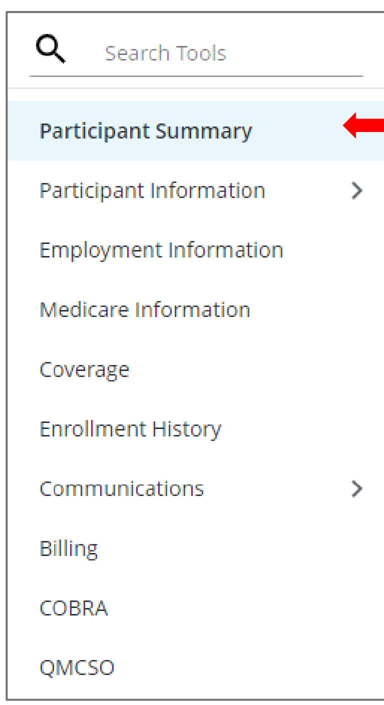
3. To access the member's data, click the person icon to the left of the member's name.
   The member's Participant Profile screen displays.



Note that the name of the selected member appears in a tab at the top of the screen.

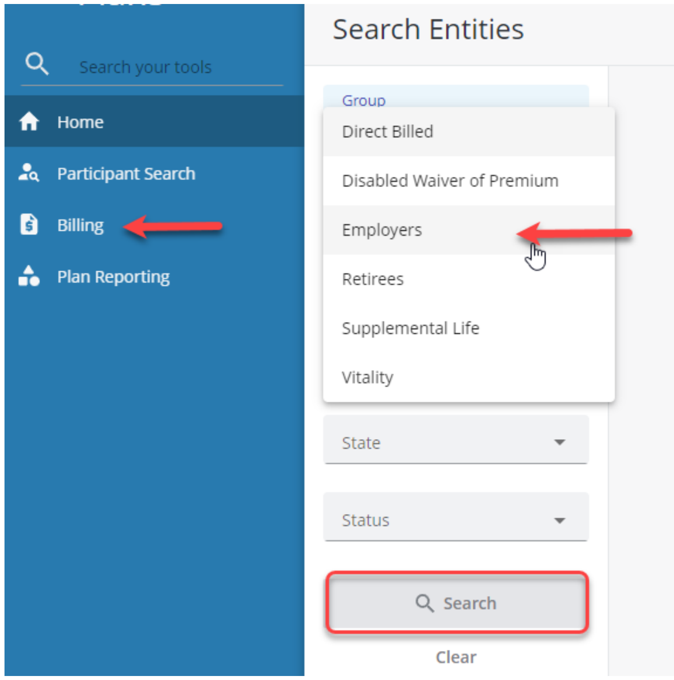


This screen is called the **Participant Summary** and the command is highlighted on a new white menu that displays. This menu may be called the **participant** (or member) **menu**. Note that the Participant Search in the blue menu (left navigation menu) takes you to the same place as the Participant Search on the home screen. Either of these methods is correct.



Billing

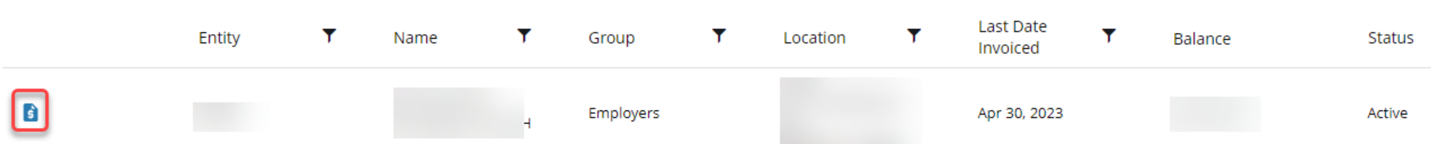
The billing section is used to view and pay monthly invoices, as well as to administer billing preferences, such as invoice delivery and auto-pay settings. This can be accessed from the Employer Billing card on your portal Home screen, or by clicking Billing in the blue left navigation panel.



To access your invoices from the **Billing** menu (versus the Employer Billing card on the Home screen).

1. Under Search Entities, select **Employers** in the Group field.

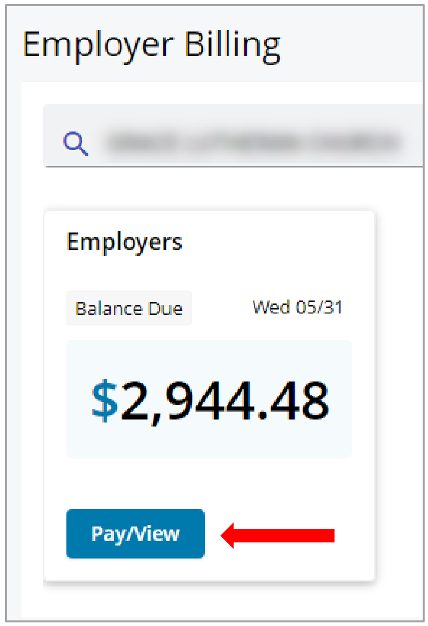
2. Click **Search**. A list of your invoices will appear. Click the invoice icon to access the Billing Home screen (additional details provided in Billing Home Screen section(s) below).



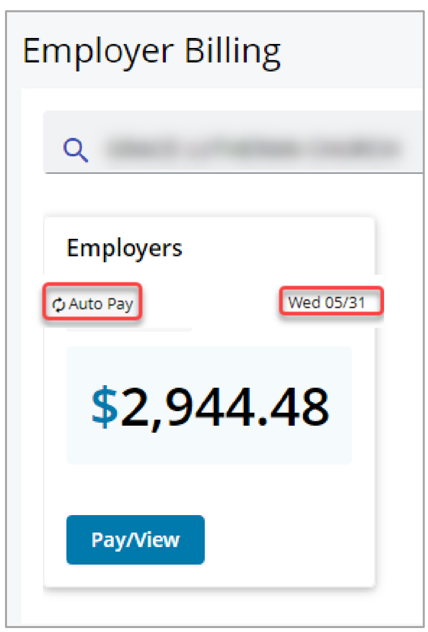
Billing Home Screen

The Billing Home Screen can be accessed by using the **Billing** option on the left navigation menu (illustrated in the previous section) or by clicking the **Employer Billing** card on the Employer Portal Home screen.

The Employer Billing card on your Employer Portal home screen displays your balance due and the due date.

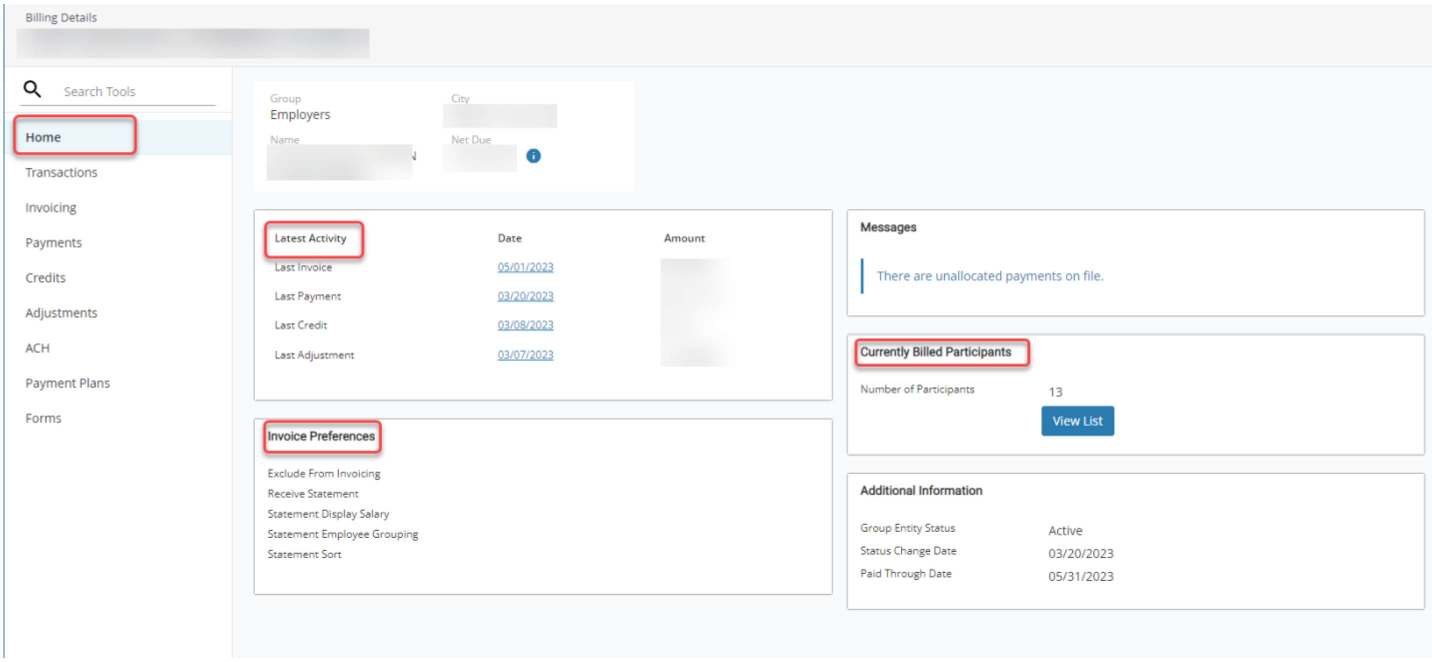


If your ministry is enrolled in Auto-Pay, you will see the balance due with an Auto-Pay indicator and the due date of the invoice. (Note: This does not indicate your ACH deduction date. You can select a specific date for payment deduction on a different screen.)

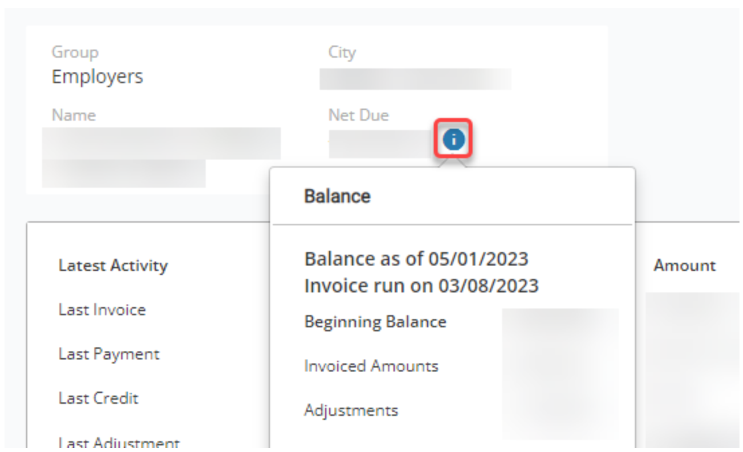


Click the **Pay/View** button.

The Billing Details screen displays, with **Home** selected on the organization navigation menu.



Click the **blue icon** to view a snapshot of the invoice balance details. Click it again to close the details window.

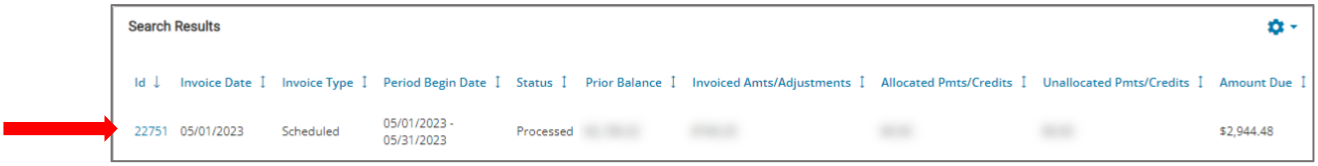


Latest Activity

The Home screen displays the **Latest Activity** section, which may include invoices, payments, credits, and other transactions.

Each transaction contains a link to its specific details in the **Date** column.

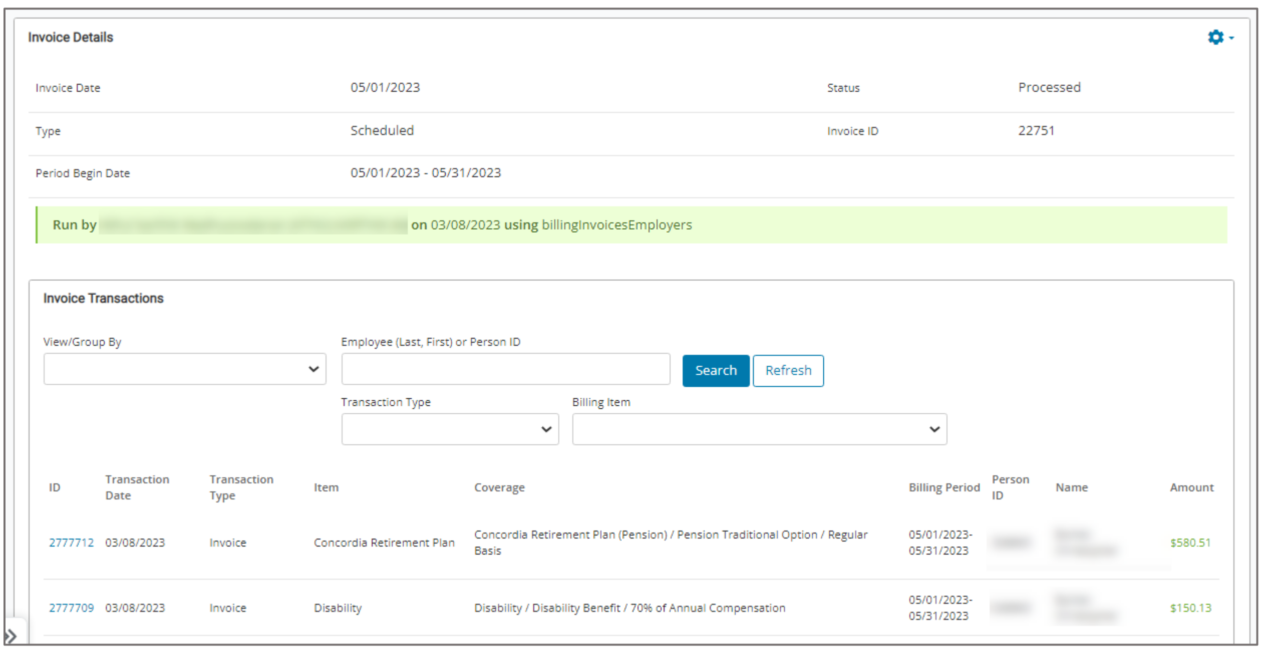
1. Click the date link to basic information about the invoice.
   The **Search Results** section opens below.



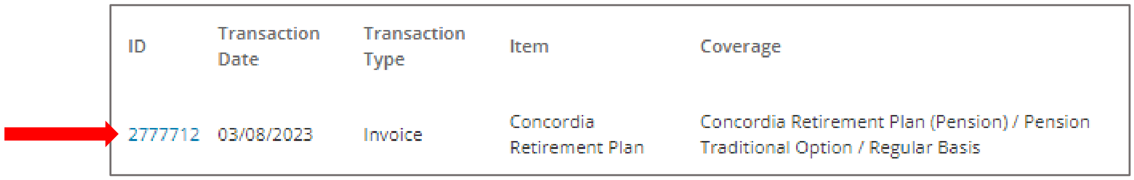
The Search Results displays the Invoice Date, Invoice Type, Status, Prior Balance, Invoiced Amounts/Adjustments, Allocated Pmts/Credits, Unallocated Pmts/Credits, and Amount Due columns.

Note the **ID** column which contains a link.

2. Click the link in the **ID** column to show a list of transactions included in that particular invoice.
   The **Invoice Details** section opens below, which contains all the transactions of the invoice.

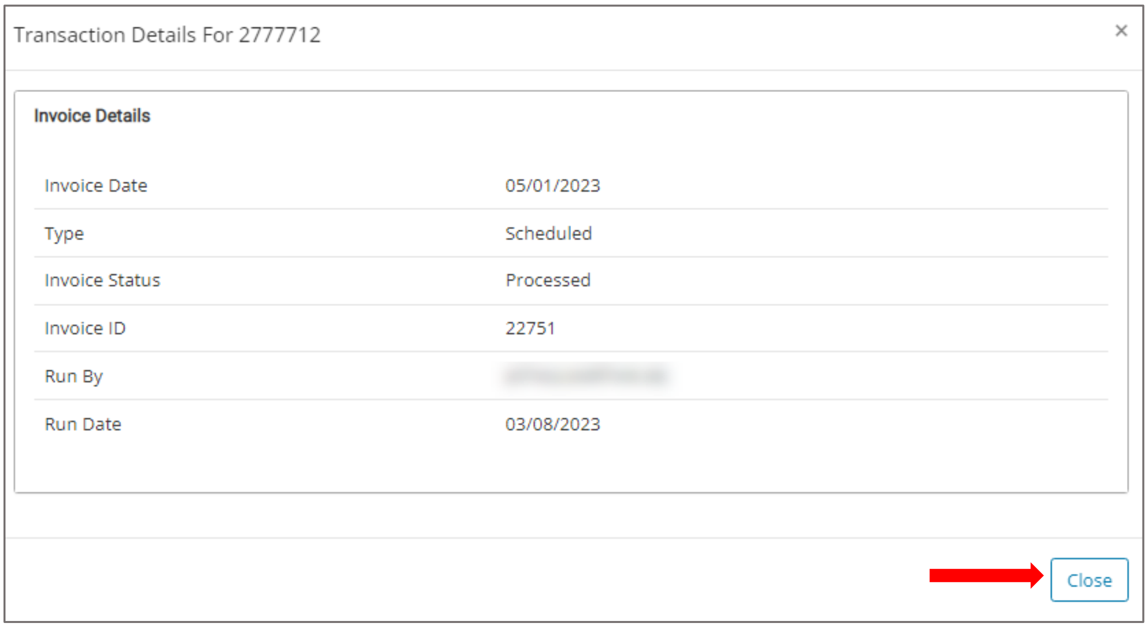


Each transaction contains a link as well in its **ID** column.



ID	Transaction Date	Transaction Type	Item	Coverage
2777712	03/08/2023	Invoice	Concordia Retirement Plan	Concordia Retirement Plan (Pension) / Pension Traditional Option / Regular Basis

3. Click the link in the **ID** column to view additional details about a specific transaction. The Transaction Details window opens.



Transaction Details For 2777712

Invoice Details

Invoice Date	05/01/2023
Type	Scheduled
Invoice Status	Processed
Invoice ID	22751
Run By	[redacted]
Run Date	03/08/2023

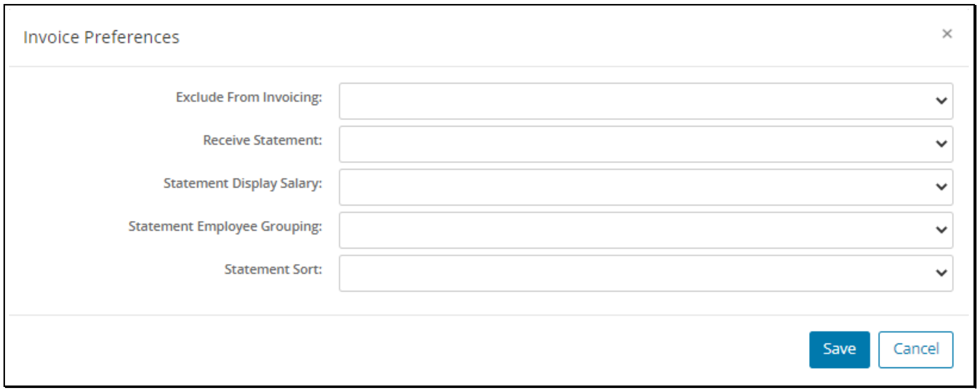
Close

4. Click the **Close** button when finished viewing the Transaction Details.

Invoice Preferences

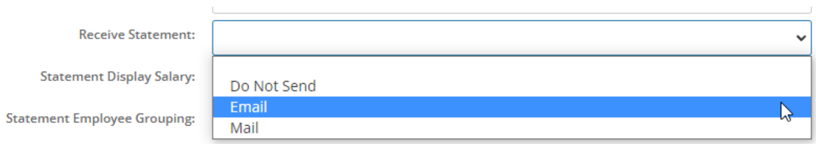
The Billing Home screen also contains an Invoice Preferences section, which allows for setting the display attributes of the invoices.

1. Click the **Update** button.
   The Invoice Preferences window opens.



2. Click the drop-down arrows in each of the preference fields, and make the appropriate selections for your organization.

   Choose from **Mail** or **Email**. Selecting Do Not Send will generate an error message and your changes will not be saved.

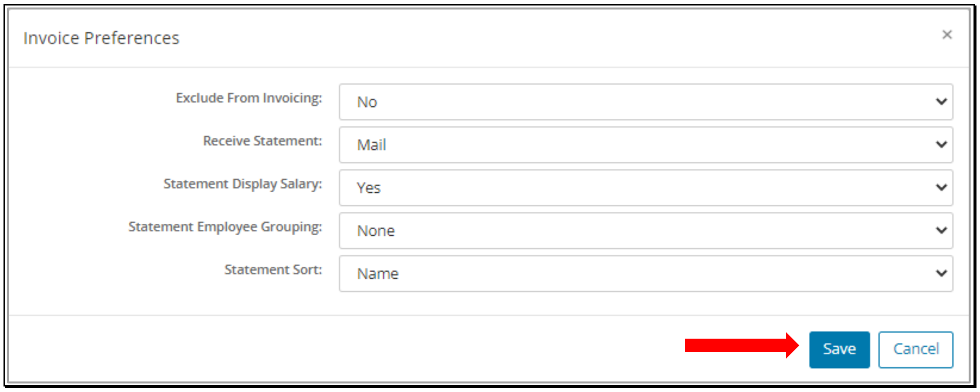


Note: The default Invoice Preference will be Mail.

- If **Mail** is selected, your invoice will be mailed to you on/around the 4th business day of the month. Your invoice will include a **Member Cost** report, which displays changes to benefits that might result in a change to worker payroll deduction.

- If **Email** is selected, you will receive an email notification at your portal-registered email address indicating an invoice is ready for you to view in the Employer Portal. Your invoice will no longer be mailed.
  - The Member Cost report will not be included on your digital invoice.
  - To view the **Member Cost** report, use the Plan Reporting section to run a Member Cost report.
  - Additional instructions are included in the **Plan Reporting > Custom Reports > Member Cost File** section of the training guide.

3. When finished, click the **Save** button.

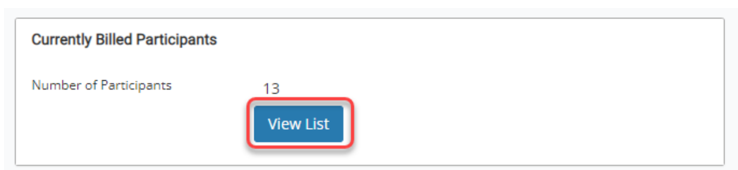


The updated preferences display in the Invoice Preferences section of the Billing Home screen.

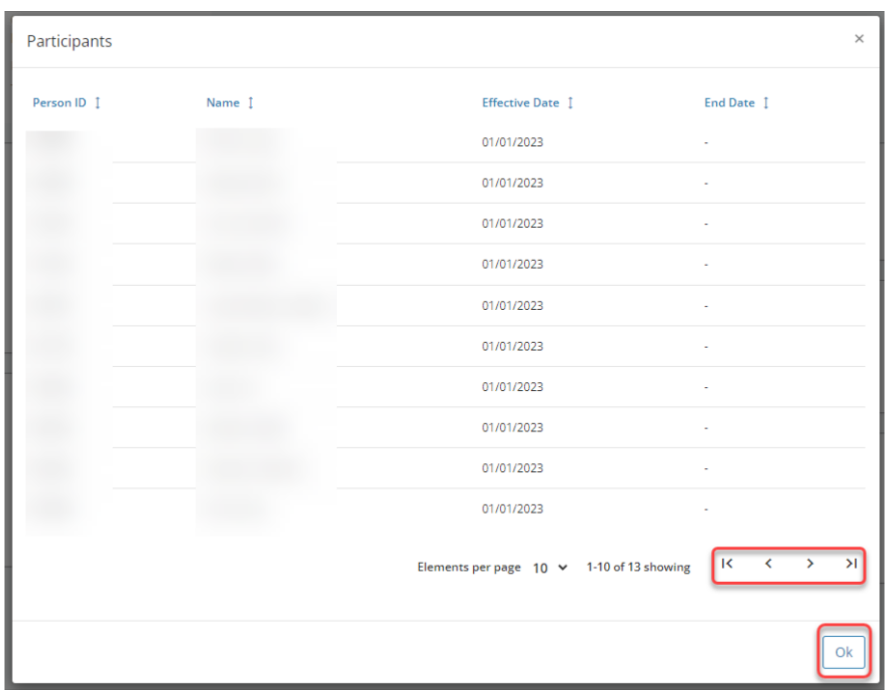
Currently Billed Participants

The Currently Billed Participants card provides a quick view of the number of participants (members) on your current invoice.

1. Click the **View List** button to view a list of your currently billed members.



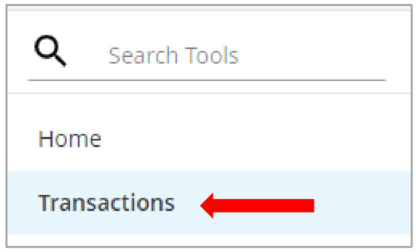
2. A new window opens that displays the Person ID (member ID), Name, Effective Date and End Date (if applicable). Use the arrows to navigate through the list and click **OK** when you're finished viewing.



Transactions

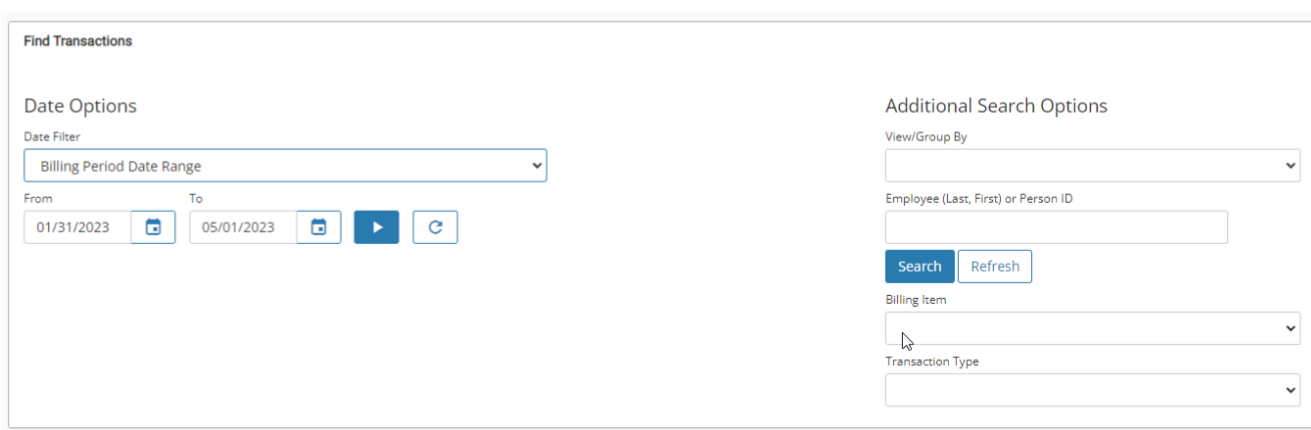
The Transactions screen shows individual transactions related to an invoice. You can also download a list of transactions to Excel from this screen.

1. Click **Transactions** on the navigation menu to see the activity details for invoicing.



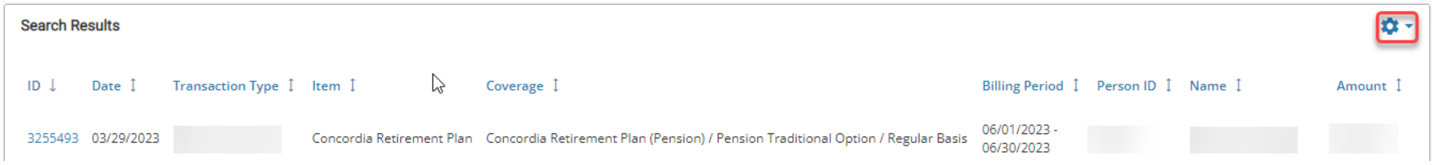
2. A list of transactions will display.

3. You can refine your results by using the Find Transactions section to filter by date or other criteria. Use the dropdowns to view the filter options.



Downloading to Excel

The subsequent screens give you the option to download your results to Excel. This function is available anytime you see the gear icon in the upper right corner of search results screen.



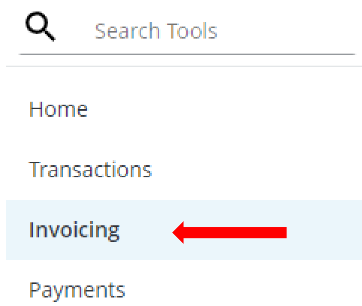
1. Click the gear icon, then click **Download Results To Excel**.

2. Open the Excel document to view the downloaded results. From here, you may save, edit or print the Excel file according to your ministry's needs.

GROUP	ENTITY	TRANSACTIO	TRANSACTIO	TRANSACTION	ITEM	COVERAGE	BILLING PERIOD	PERSON ID	NAME	TRANSACTIO
employers			03/29/2023		Concordia Retirement Plan	Concordia Retirement Plan (Pension)/Pension Traditional Option/Regular Basis	06/01/2023 - 06/30/2023			369.75
employers			03/29/2023		Concordia Retirement Plan	Concordia Retirement Plan (Pension)/Pension Traditional Option/Regular Basis	06/01/2023 - 06/30/2023			290
employers			03/29/2023		Concordia Retirement Plan	Concordia Retirement Plan (Pension)/Pension Traditional Option/Regular Basis	06/01/2023 - 06/30/2023			290
employers			03/29/2023		Concordia Retirement Plan	Concordia Retirement Plan (Pension)/Pension Traditional Option/Regular Basis	06/01/2023 - 06/30/2023			297.25
employers			03/29/2023		Concordia Retirement Plan	Concordia Retirement Plan (Pension)/Pension Traditional Option/Regular Basis	06/01/2023 - 06/30/2023			471.25
employers			03/29/2023		Concordia Retirement Plan	Concordia Retirement Plan (Pension)/Pension Traditional Option/Regular Basis	06/01/2023 - 06/30/2023			362.5
employers			03/29/2023		Concordia Retirement Plan	Concordia Retirement Plan (Pension)/Pension Traditional Option/Regular Basis	06/01/2023 - 06/30/2023			282.75

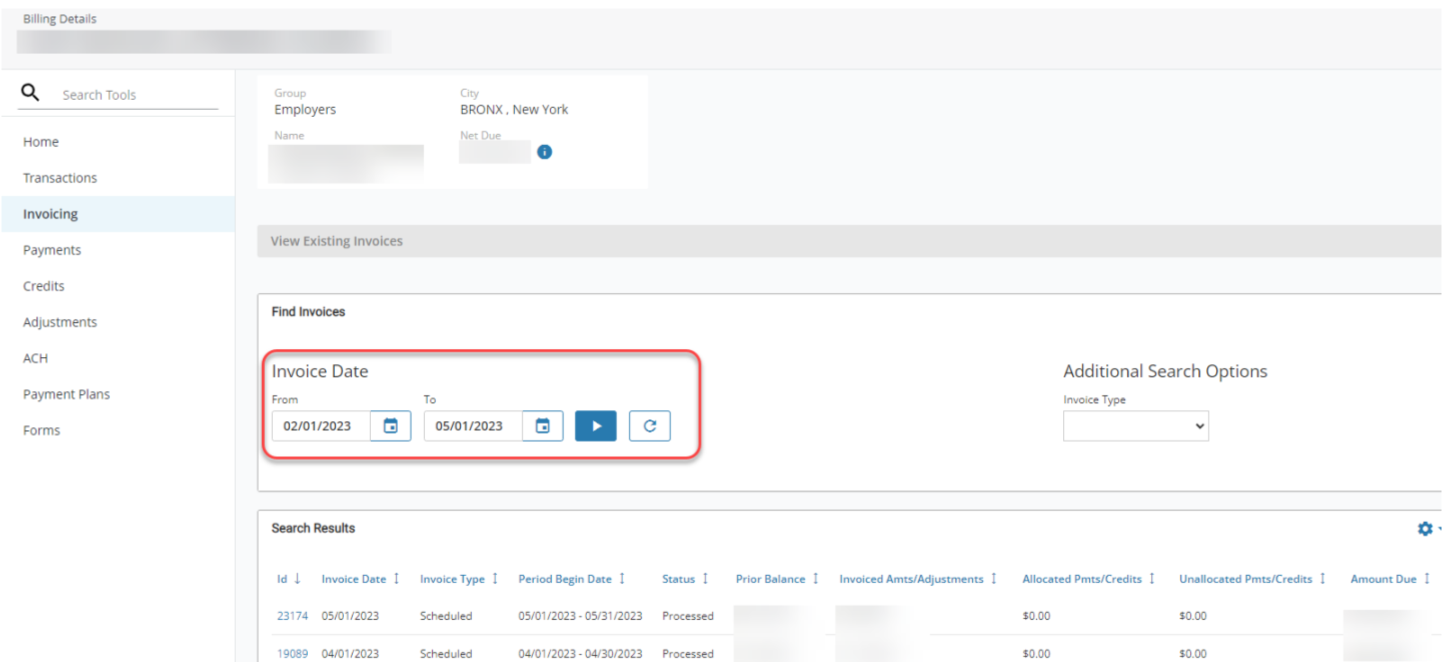
Invoicing

This selection is another method to view a listing of your invoices.



1. Click **Invoicing** on the navigation menu.

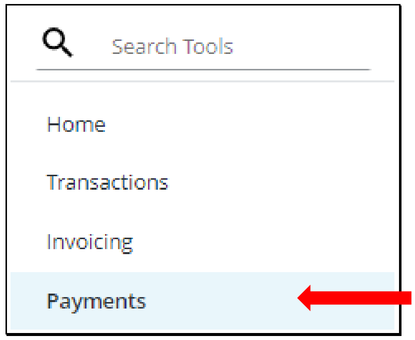
2. A list of invoices will display. Use the **Invoice Date** section to search for invoice from a particular date range.



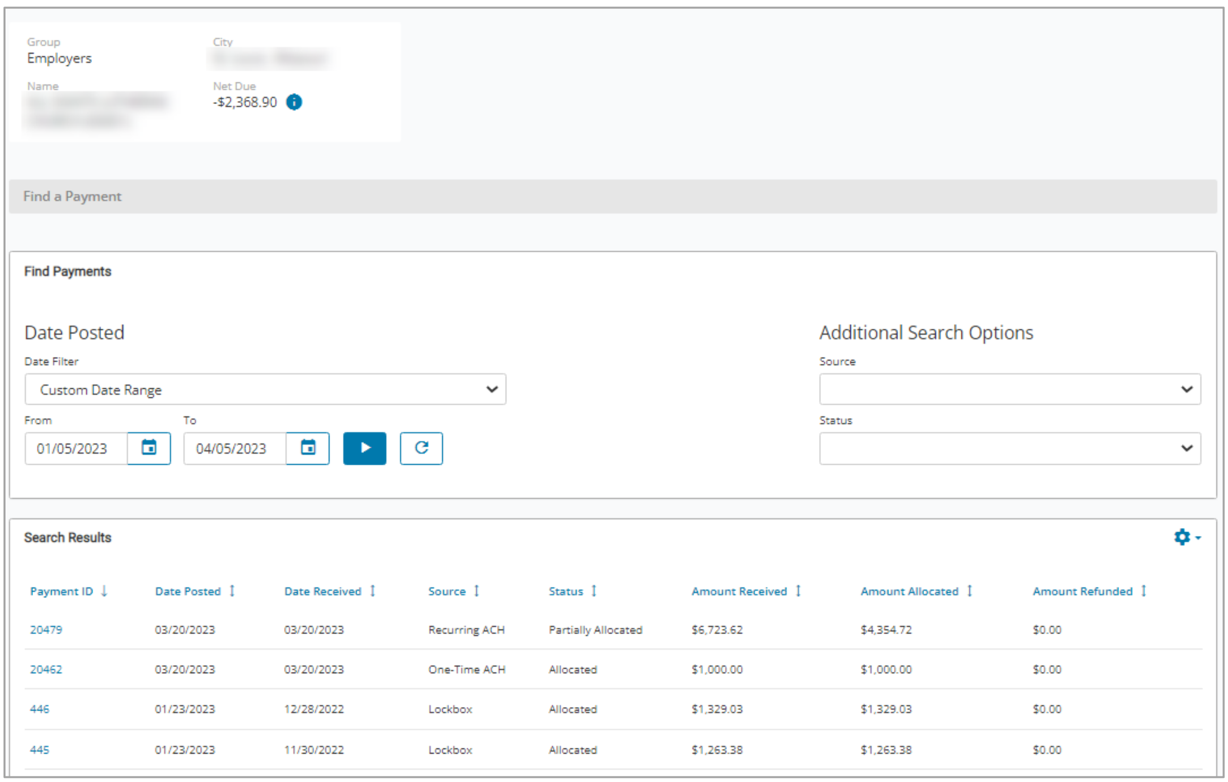
3. Click on any invoice ID, then follow the follow the directions in the **Latest Activity** section of this guide to navigate the subsequent screens.

Payments

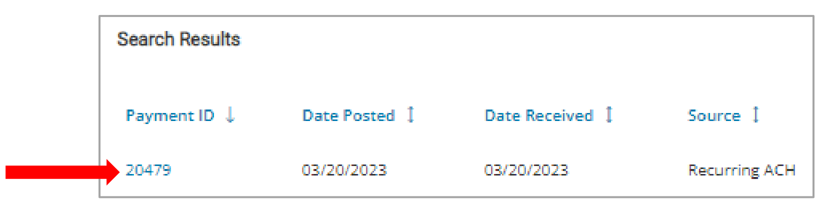
The Payments screen shows a list of payments submitted by your organization.



1. Click **Payments** on the navigation menu.
   The Payments screen displays.

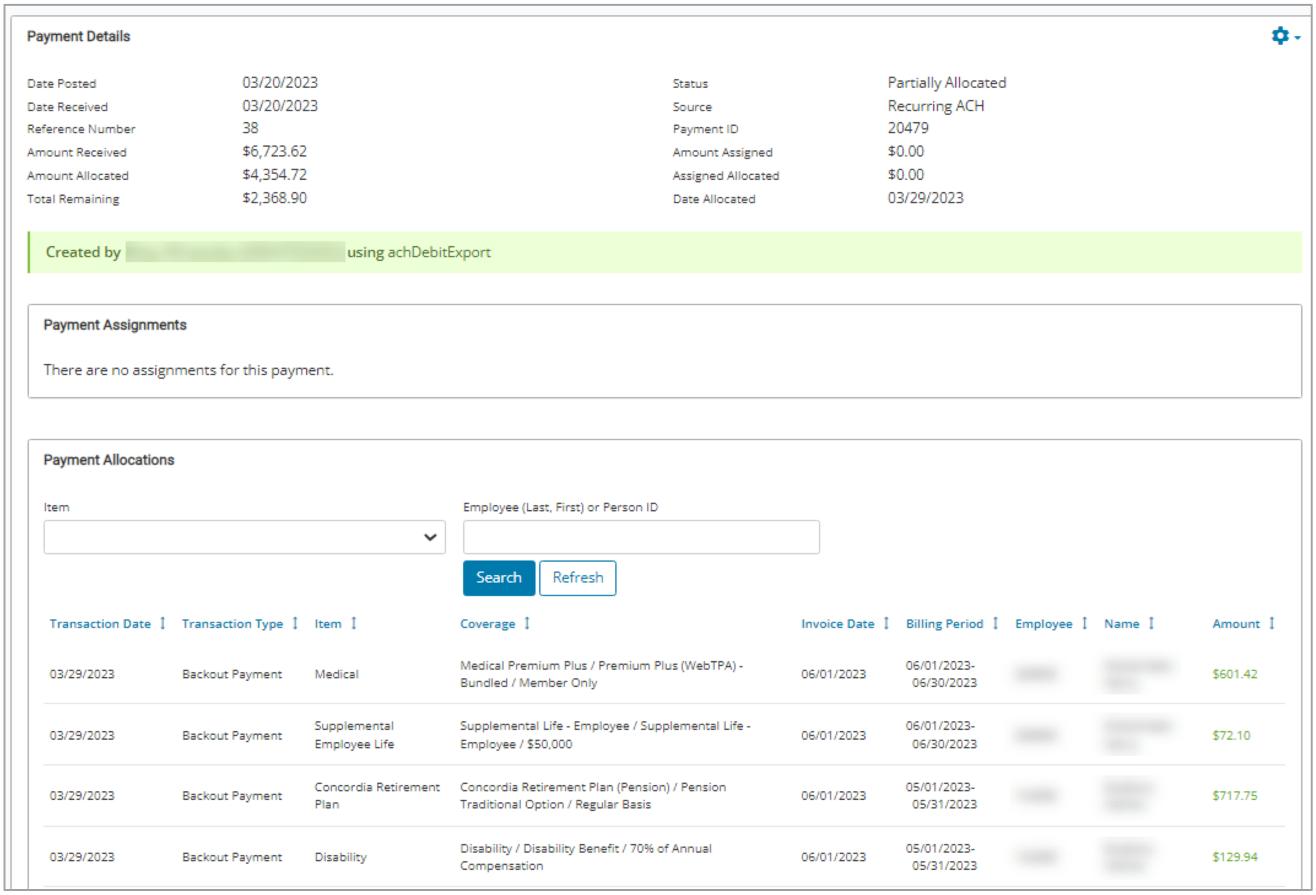


The Payments screen contains a table with recent activity in the Search Results section. Each transaction contains a link to its details in the **Payment ID** column.



2. Click the link in the **Payment ID** column.

The Payment Details, Payment Assignments, and Payment Allocations sections display.



Payment Details

Date Posted	03/20/2023	Status	Partially Allocated
Date Received	03/20/2023	Source	Recurring ACH
Reference Number	38	Payment ID	20479
Amount Received	$6,723.62	Amount Assigned	$0.00
Amount Allocated	$4,354.72	Assigned Allocated	$0.00
Total Remaining	$2,368.90	Date Allocated	03/29/2023

Created by [illegible] using achDebitExport

Payment Assignments

There are no assignments for this payment.

Payment Allocations

Item

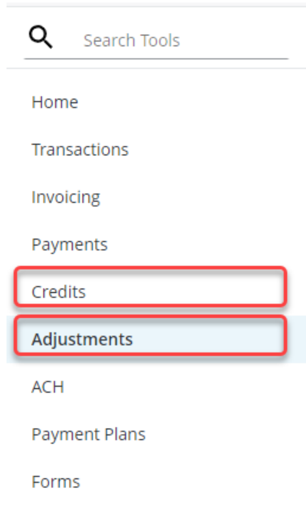
Employee (Last, First) or Person ID

Search Refresh

Transaction Date	Transaction Type	Item	Coverage	Invoice Date	Billing Period	Employee	Name	Amount
03/29/2023	Backout Payment	Medical	Medical Premium Plus / Premium Plus (WebTPA) - Bundled / Member Only	06/01/2023	06/01/2023-06/30/2023	[illegible]	[illegible]	$601.42
03/29/2023	Backout Payment	Supplemental Employee Life	Supplemental Life - Employee / Supplemental Life - Employee / $50,000	06/01/2023	06/01/2023-06/30/2023	[illegible]	[illegible]	$72.10
03/29/2023	Backout Payment	Concordia Retirement Plan	Concordia Retirement Plan (Pension) / Pension Traditional Option / Regular Basis	06/01/2023	05/01/2023-05/31/2023	[illegible]	[illegible]	$717.75
03/29/2023	Backout Payment	Disability	Disability / Disability Benefit / 70% of Annual Compensation	06/01/2023	05/01/2023-05/31/2023	[illegible]	[illegible]	$129.94

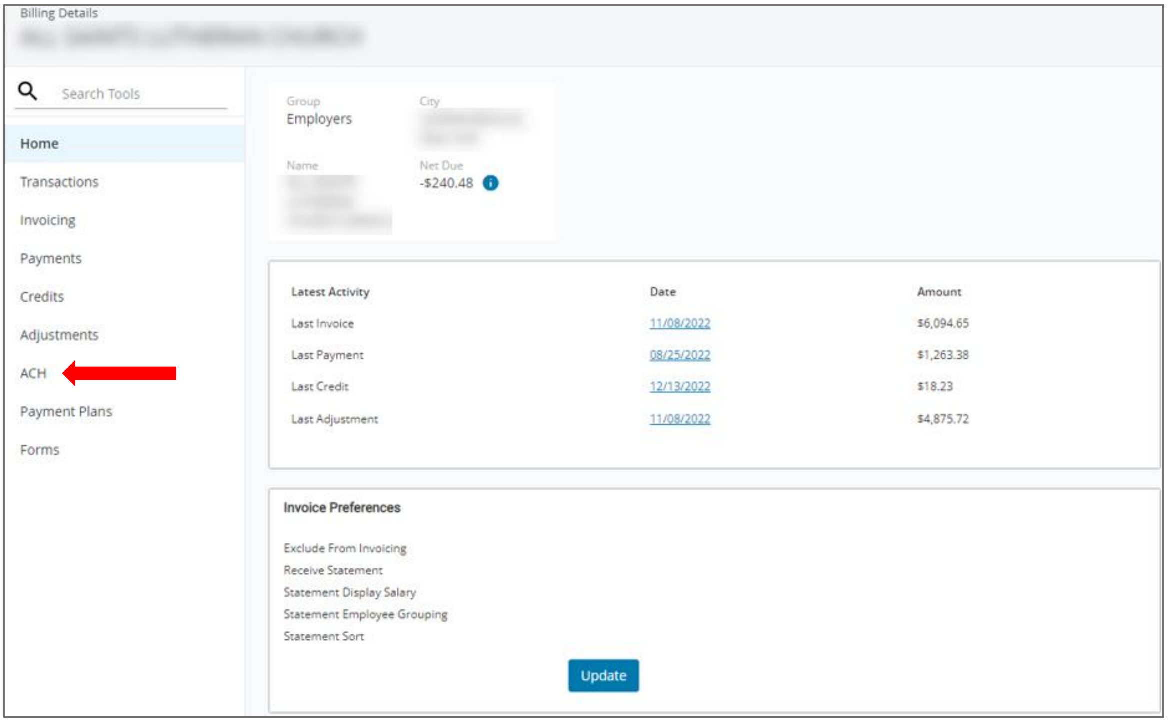
Credits and Adjustments

These options function similar to the Transaction, Invoicing and Payments screens. Use these to locate and view credits and adjustments related to your ministry's invoices.

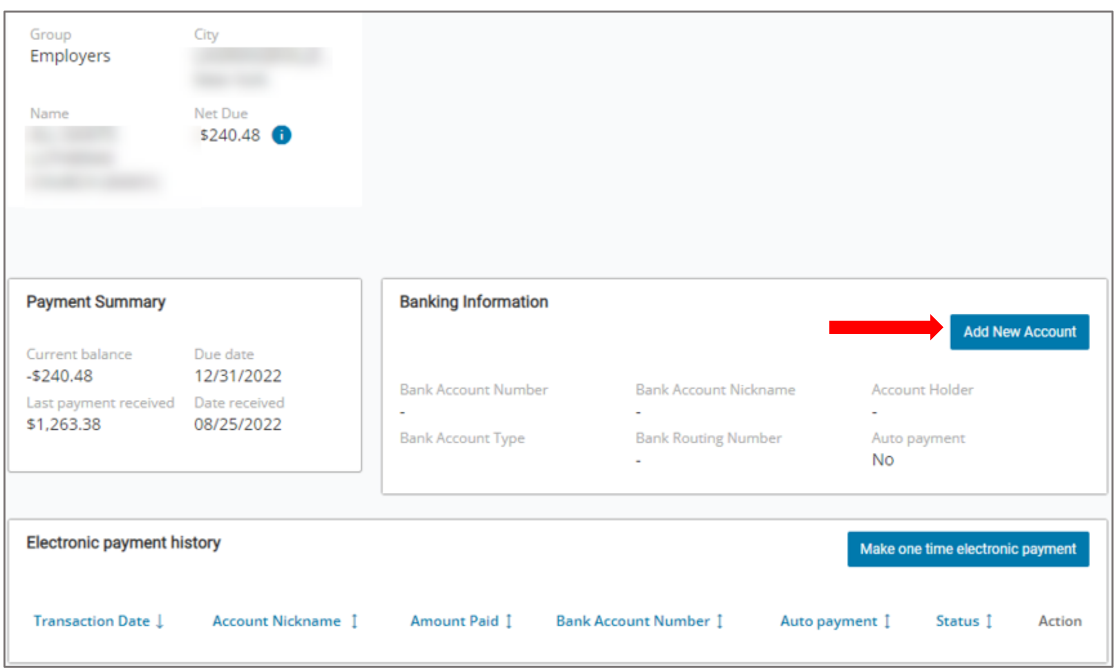


ACH

An ACH account must be set up for you to pay your invoice balances online.

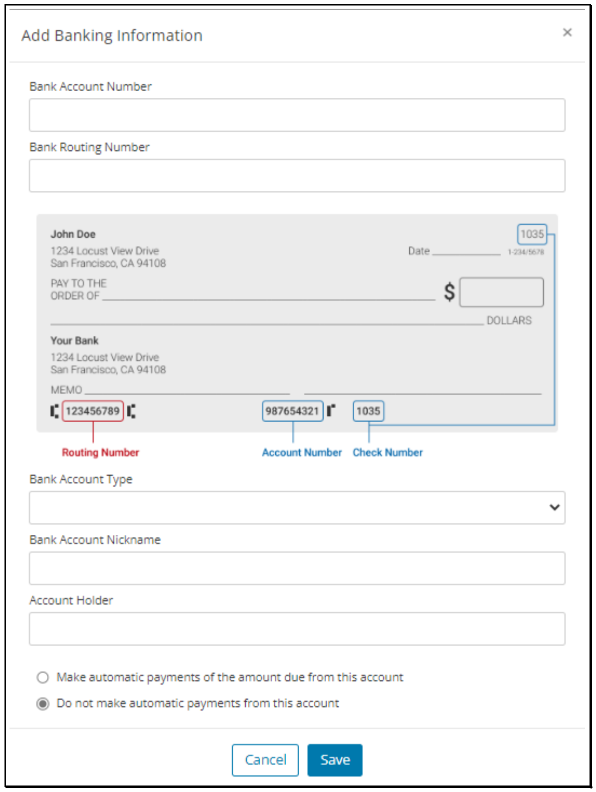


1. Click **ACH** on the navigation menu.
   Your Payment Summary, Banking Information, and Electronic Payment History display.

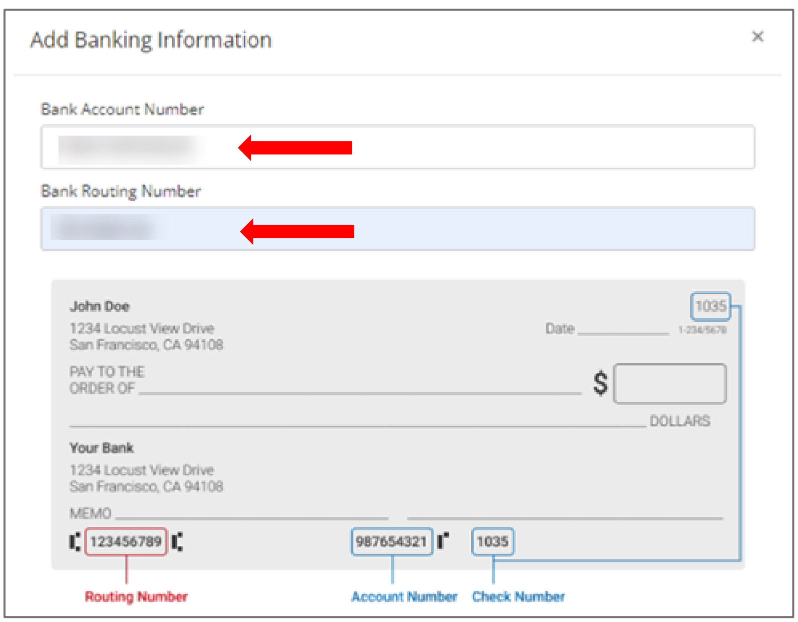


In this example, the Banking Information does not contain any accounts.

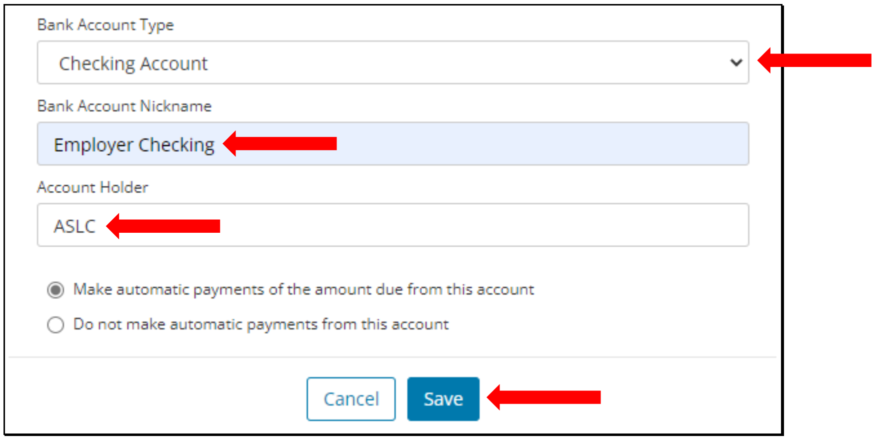
2. Click the **Add New Account** button.
   The Add Banking Information window opens.



3. Type the account number in the **Bank Account Number** field.



4. Type the routing number in the **Bank Routing Number** field.



5. Click the drop-down arrow in the **Bank Account Type** field and select the account type. Checking and Savings are available.

6. Type a name for the account in the **Bank Account Nickname** field.

7. Type a name for the account holder in the **Account Holder** field.

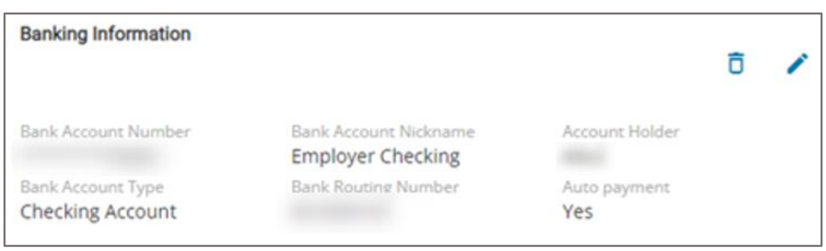
8. Indicate whether you want to make automatic payments from this account.

   If yes:

   - Select the day you'd like your monthly automatic payments deducted from the dropdown menu.
   - The full invoiced amount will be deducted from the account on that specific day of the month.
   - Note: if the payment date falls on the weekend or a holiday, the payment will be processed the following business day.
   - Click the **Save** button to proceed.

   If no: Click the **Save** button to proceed.

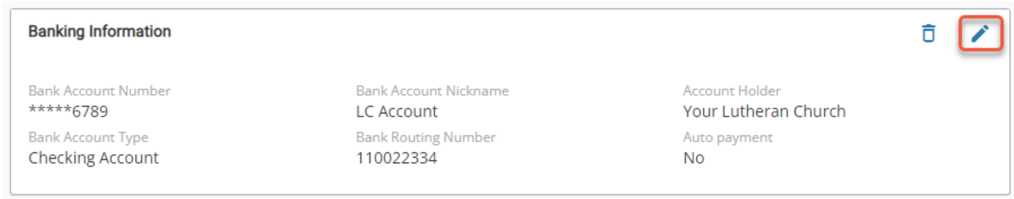
9. The system returns to the Banking Details screen. The new account information displays in the Banking Information section.



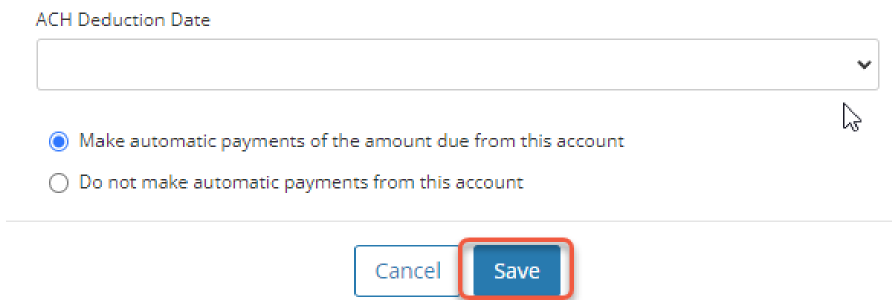
Adding or Editing Automatic Payments

Update your automatic payment settings at any time by editing your banking information the ACH screen.

1. In the Banking Information section, click the pencil icon.



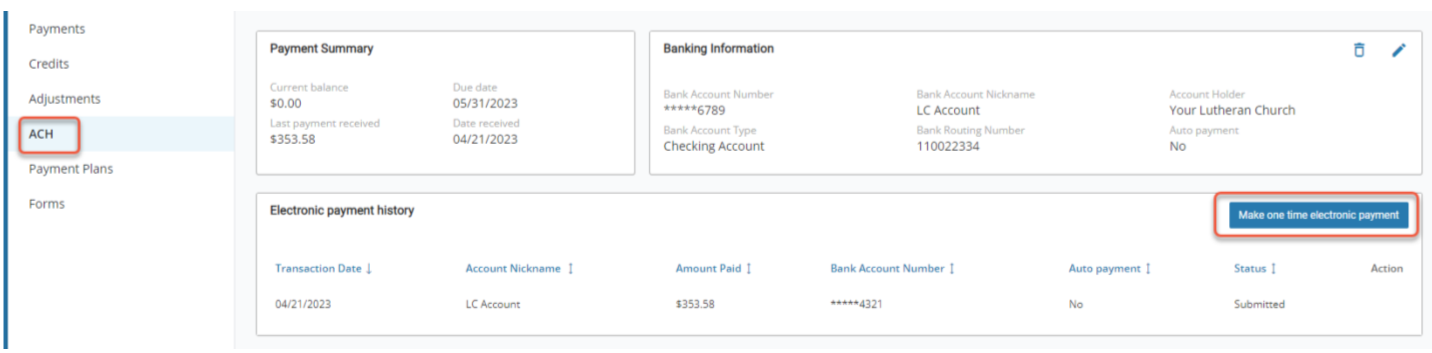
2. Update your automatic payments preference and/or ACH Deduction Date. Click **Save**.



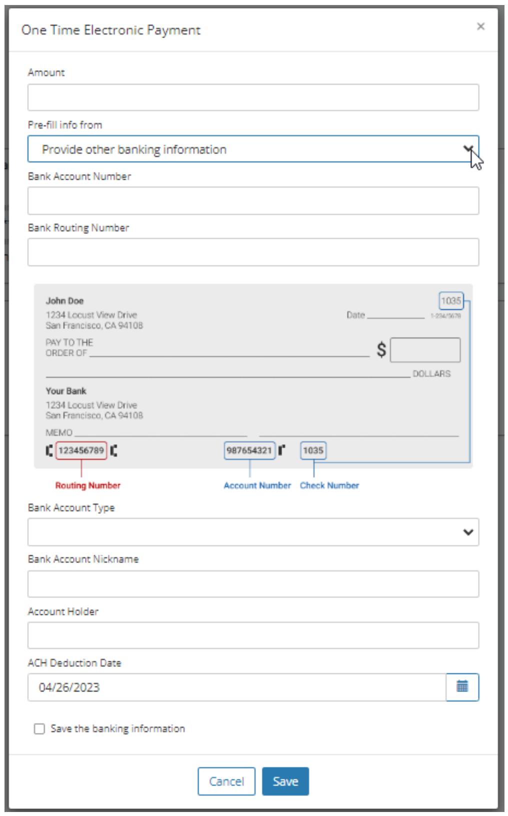
Make a One Time Payment

If you don't set up automatic payments but want to pay online, use the **Make one time electronic payment** button on the ACH screen.

1. Click **Make one time electronic payment**.



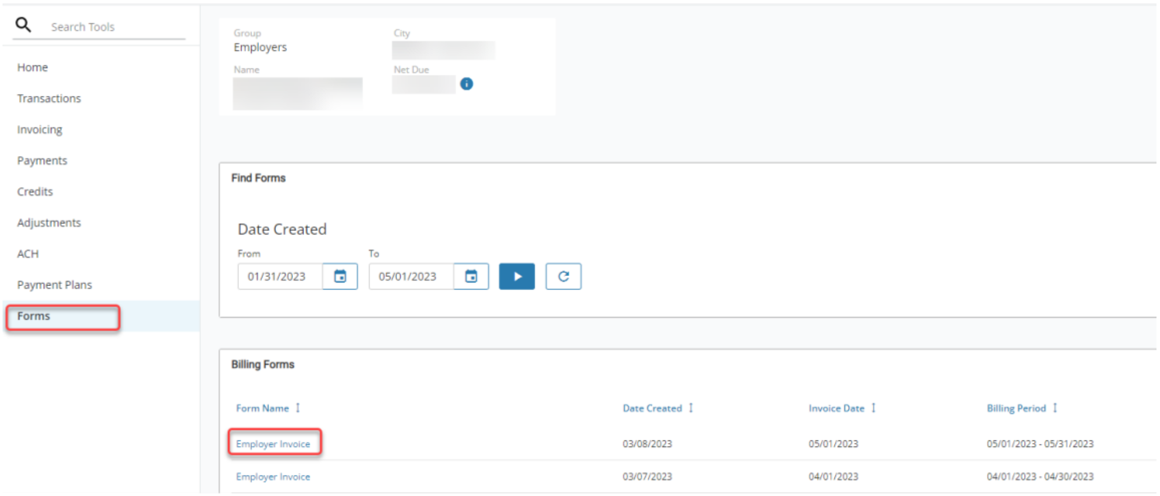
2. Enter the following information:
   - **Amount:** Enter the Current Balance or desired payment amount.
   - **Pre-fill info from:**
     - Choose **Banking information on file** to use an existing account.
     - Choose **Provide other banking information** to enter a new bank account.
       Note: If you choose to provide other banking information, you must complete the remaining account information fields.
   - **ACH Deduction Date:** Defaults to "today's" date. Change to your desired payment date if needed.
   - Click **Save.**



Forms

You can view and download a PDF version of your invoices using the **Forms** section.

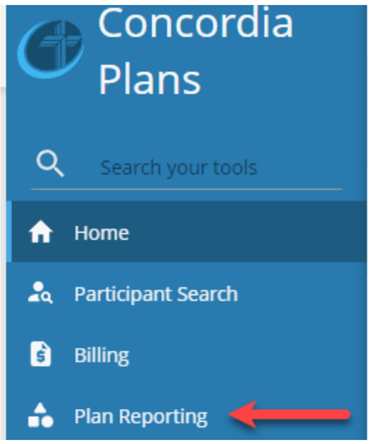
1. Click **Forms** in the navigation menu to view or download your invoice statement.
2. Select the **Employer Invoice** link under the Form Name column.
   Note: The first invoice viewable in the Employer Portal is June 2023.



3. The invoice will download in a PDF format. Ensure your pop-up blocker is disabled.

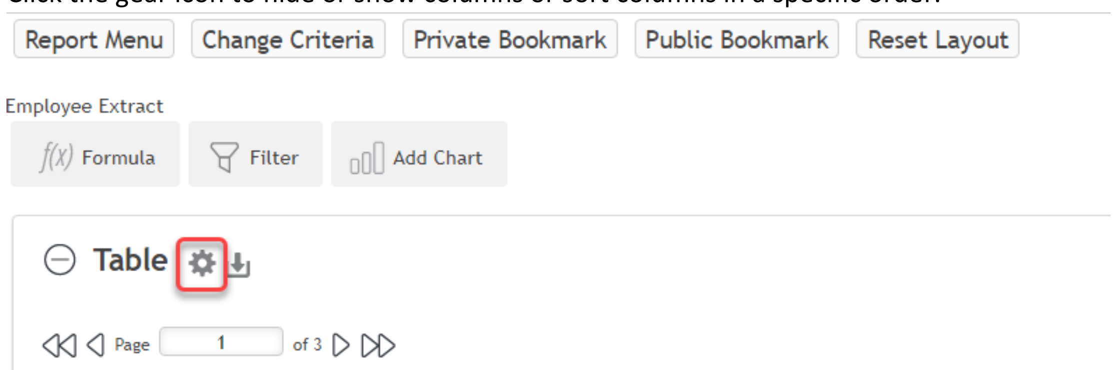
Plan Reporting

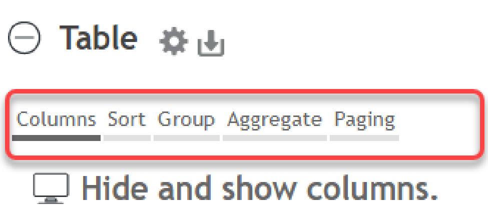
Invoice administrators can run various standard reports using the Plan Reporting menu.



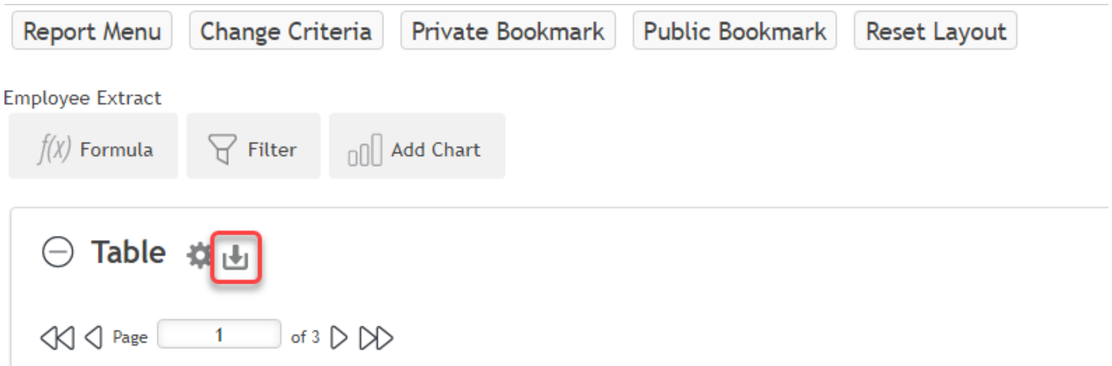
General Navigation

- Click **Plan Reporting** in the left navigation pane. The **Standard Reports** menu will open in a separate window.
- Click on the name of your desired report.
- Enter your desired report parameters and click **Run Report**.
- Within your report results:
    - Click the gear icon to hide or show columns or sort columns in a specific order.

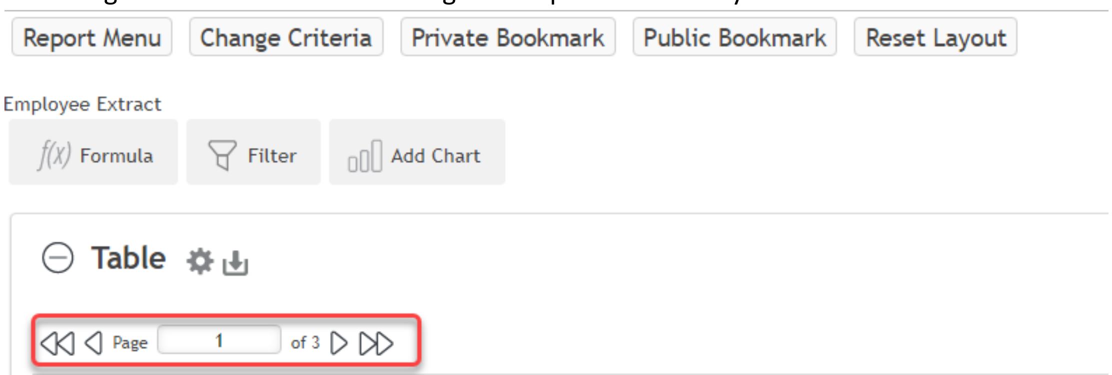




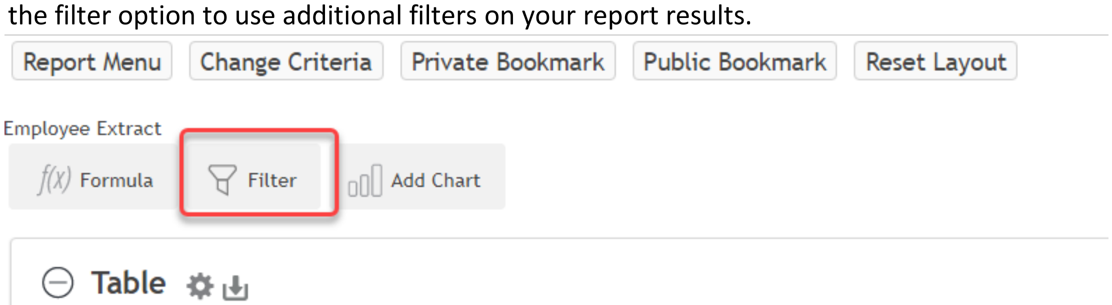
- Click the download icon to export your results to Excel, CSV or PDF.



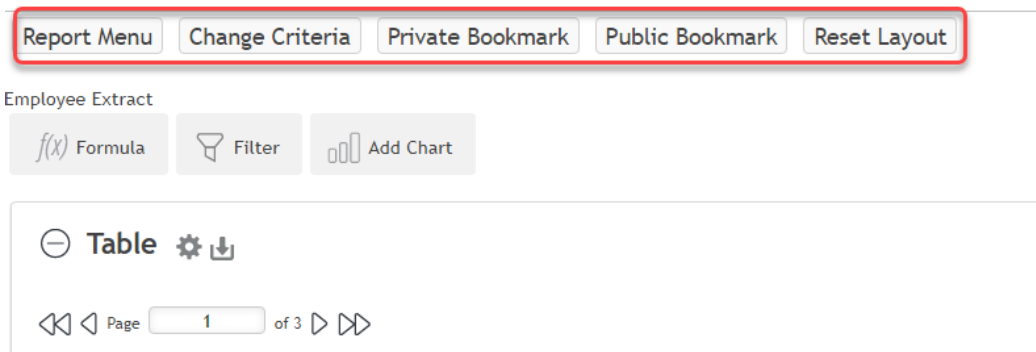
- Use the navigation arrows to scroll through the report results on your screen.



- Use the filter option to use additional filters on your report results.



- Use the options on the top row to perform the following actions:
  - **Report Menu:** Exit current screen and return to Standard report menu.
  - **Change Criteria:** Go back to parameters screen and change your report criteria.
  - **Private Bookmark**: Save this report and any formatting you applied as "favorite," accessible to only you in the Private Bookmarks section of the Standard reports menu.
  - **Public Bookmark:** Save report for all users, regardless of who created them. **Because they are available to all users, we recommend you do not use the Public Bookmarks function.**
  - **Reset Layout:** Resets your report results to the standard layout, before updates to column visibility and additional sorting/filtering were added.

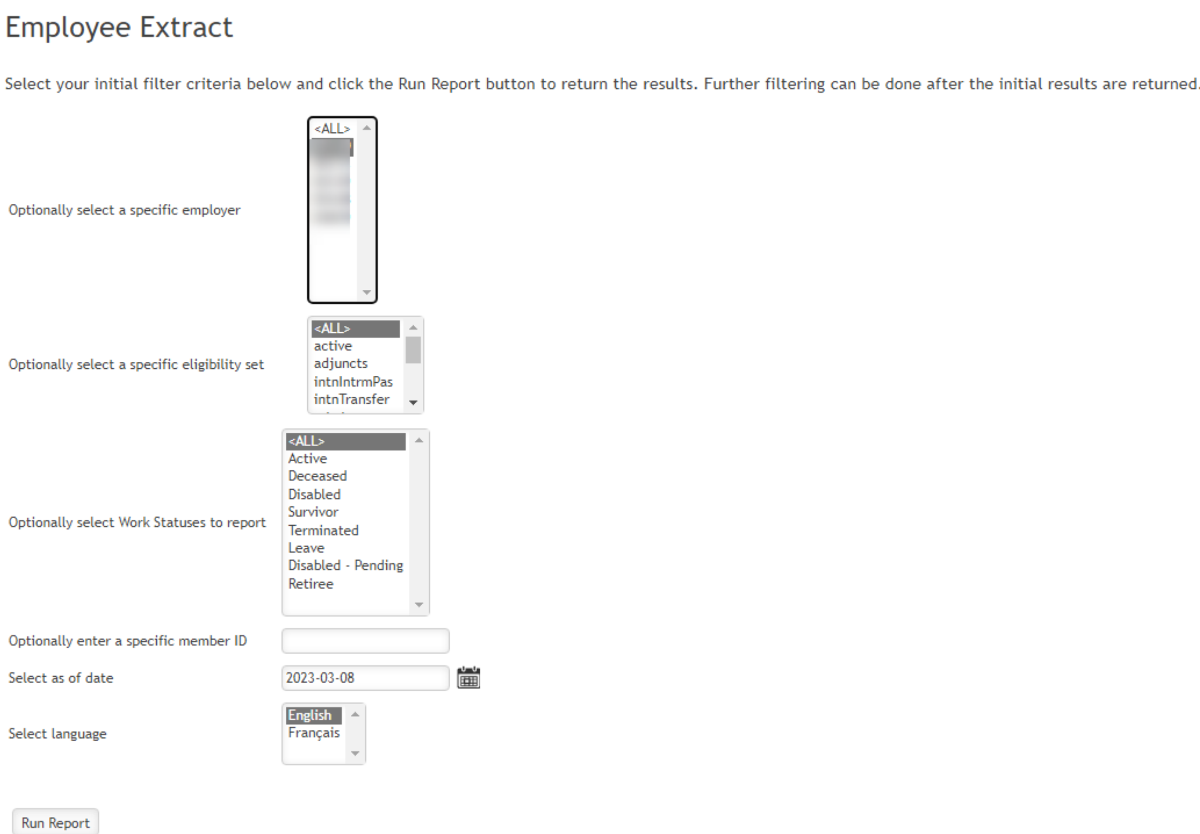


Standard Reports

Employee Extract

The Employee Extract shows list of employees and their demographic information at your ministry on a specific date. You may filter the report to include only active employees (or other worker statues.)

Report Parameters:



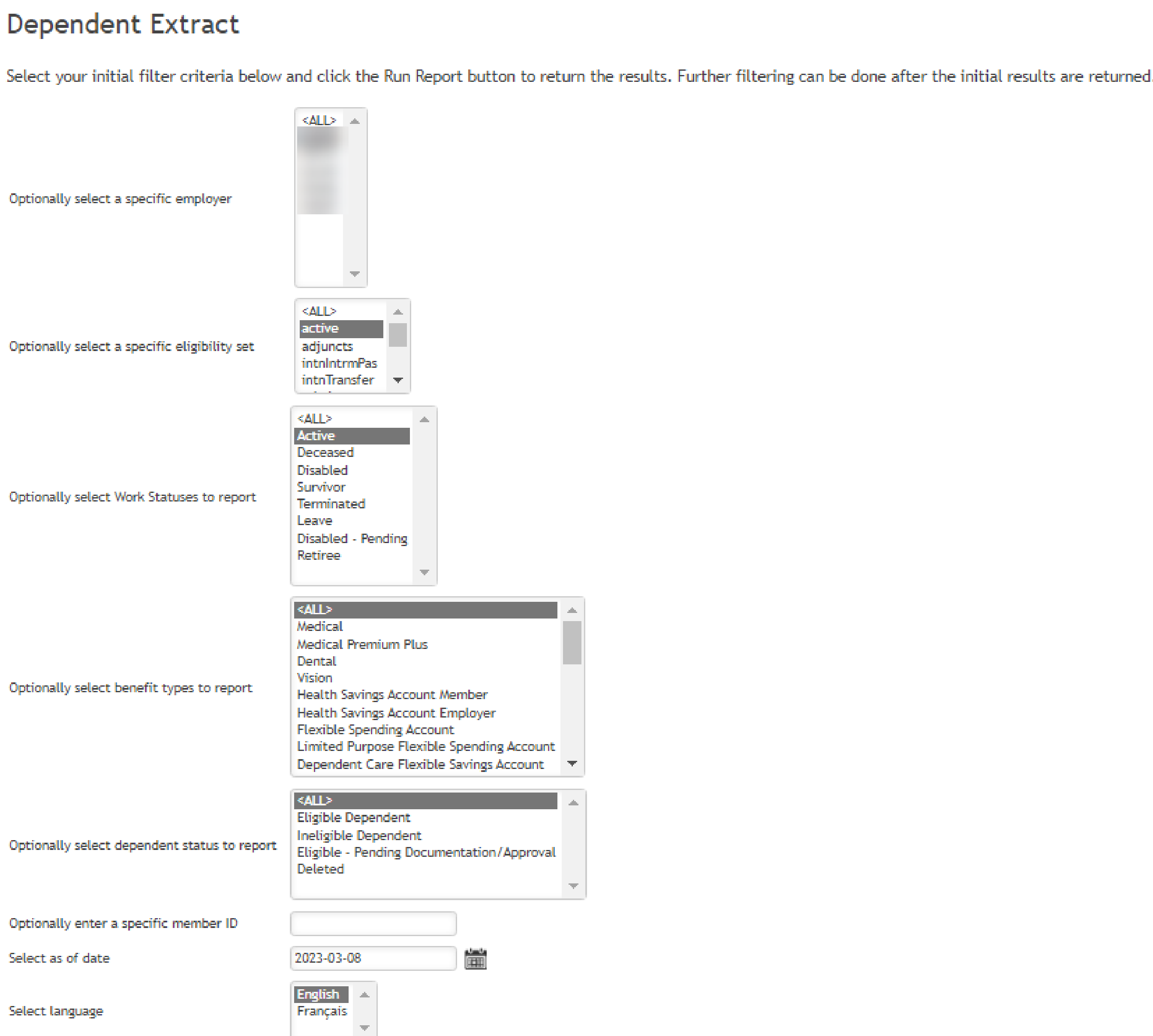
Fields Included in Employee Extract Results:

- (All)
- Employer
- Employee ID
- Last Name
- First Name
- Middle Name
- Salutation
- Suffix
- SSN
- Street Address Line 1
- Street Address Line 2
- City
- State
- Country
- ZIP Code
- Address Type
- Home Address Change Date
- Bad Address Indicator
- Mailing Preference Indicator
- Mailing Preference Indicator Effective Date
- Member Eligibility Set
- Member Eligibility Set Effective Date
- Gender
- Phone Number
- Date of Birth
- Date of Death
- Email Address
- Email Address Type
- Bad Email Address Indicator
- Direct Bill Flag

Dependent Extract

The Dependent Extract Shows list of employees and their dependents and benefits in which they are enrolled as of a specific date. You may filter the report to include only active employees (or other worker statues) as well as for specific benefit types.

Report Parameters:



Fields Included in Dependent Extract Results:

- (All)
- Employer
- Employee ID
- Last Name
- First Name
- Middle Name
- Salutation
- Suffix
- Date of Birth
- Gender
- Member Eligibility Set
- Member Eligibility Set Effective Date
- Dependent Last Name
- Dependent First Name
- Dependent Middle Initial
- Dependent Gender
- Dependent Status
- Dependent Relationship
- Dependent Date of Birth
- Dependent Disabled Status
- Dependent QMSCO Status
- Dependent Benefit Description
- Dependent Plan Description
- Dependent Option Description
- Dependent Coverage Effective Date
- Dependent Coverage Term Date

Benefit Extract

The Benefit Extract shows list of employees and benefits in which they are enrolled as of a specific date. You may filter the report to include only active employees (or other worker statues) as well as for specific benefit types.

Report Parameters:

Benefit Extract

Select your initial filter criteria below and click the Run Report button to return the results. Further filtering can be done after the initial results are returned.

Optionally select Employer: <ALL>

Optionally select a specific eligibility set: <ALL> / active / adjuncts / intnlntrmPas / intnTransfer

Optionally select employment statuses to report: <ALL> / Active / Deceased / Disabled / Survivor / Terminated / Leave / Disabled - Pending / Retiree

Optionally select benefit types to report: <ALL> / Medical / Medical Premium Plus / Dental / Vision / Health Savings Account Member / Health Savings Account Employer / Flexible Spending Account / Limited Purpose Flexible Spending Account / Dependent Care Flexible Savings Account

Optionally enter a specific Employee ID

Select as of date: 2023-03-08

Select language: English / Français

Run Report

Fields Included in Benefits Extract Results:

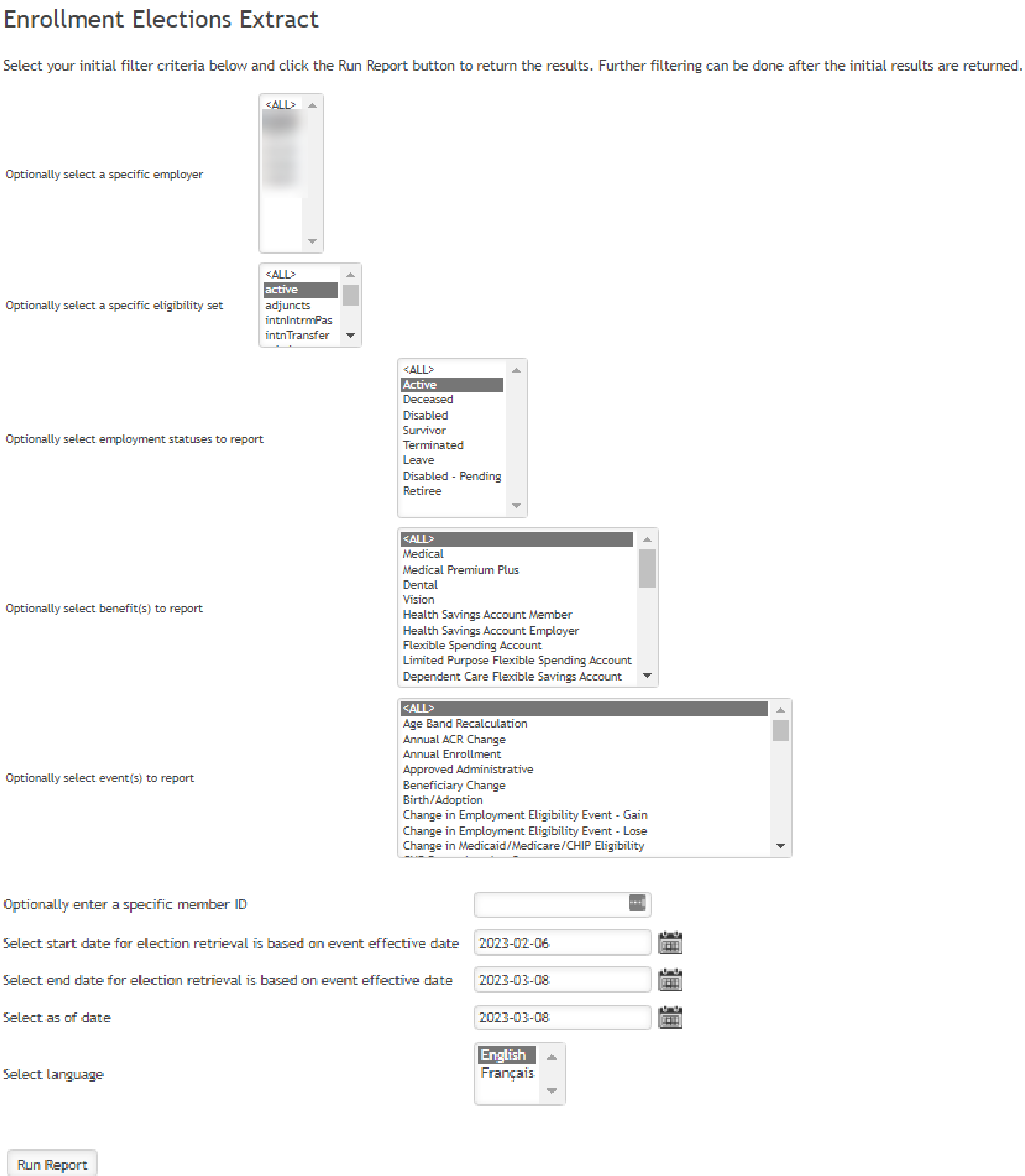
Not: EE = Employee; ER = Employer. EE costs will display only if your ministry has provided your cost share to CPS.

☑ (All)	☑ Suffix	☑ Option Description	☑ EE Annual Cost
☑ Employer	☑ Date of Birth	☑ Amount Elected	☑ ER Pay Period Cost
☑ Employee ID	☑ Gender	☑ Amount In Force	☑ ER Annual Cost
☑ Last Name	☑ Member Eligibility Set	☑ Amount Pended	☑ Imputed Income Per Pay Cost
☑ First Name	☑ Member Eligibility Set Effective Date	☑ Begin Date	☑ Imputed Income Annual Cost
☑ Middle Name	☑ Benefit Description	☑ End Date	
☑ Salutation	☑ Plan Description	☑ EE Pay Period Cost	

Enrollment Elections

The Enrollment Elections Report Shows list of employee elections for specific benefits as of a specific date range. You may filter the report to include only active employees (or other worker statues), specific benefits and specific life events.

Report Parameters:



Enrollment Elections Extract

Select your initial filter criteria below and click the Run Report button to return the results. Further filtering can be done after the initial results are returned.

Optionally select a specific employer: <ALL>

Optionally select a specific eligibility set: <ALL>, active, adjuncts, intnIntrmPas, intnTransfer

Optionally select employment statuses to report: <ALL>, Active, Deceased, Disabled, Survivor, Terminated, Leave, Disabled - Pending, Retiree

Optionally select benefit(s) to report: <ALL>, Medical, Medical Premium Plus, Dental, Vision, Health Savings Account Member, Health Savings Account Employer, Flexible Spending Account, Limited Purpose Flexible Spending Account, Dependent Care Flexible Savings Account

Optionally select event(s) to report: <ALL>, Age Band Recalculation, Annual ACR Change, Annual Enrollment, Approved Administrative, Beneficiary Change, Birth/Adoption, Change in Employment Eligibility Event - Gain, Change in Employment Eligibility Event - Lose, Change in Medicaid/Medicare/CHIP Eligibility

Optionally enter a specific member ID

Select start date for election retrieval is based on event effective date: 2023-02-06

Select end date for election retrieval is based on event effective date: 2023-03-08

Select as of date: 2023-03-08

Select language: English, Français

Run Report

Fields Included in Enrollment Elections Results:

Note: EE = Employee; ER = Employer. EE costs will display for CHP only if your ministry provided your cost share to CPS.

☑ (All)	☑ Gender	☑ Benefit Description	☑ EE Pay Period Cost
☑ Employer	☑ Member Eligibility Set	☑ Plan Description	☑ EE Annual Cost
☑ Employee ID	☑ Member Eligibility Set Effective Date	☑ Option Description	☑ ER Pay Period Cost
☑ Last Name	☑ Benefit Event Name	☑ Amount Elected	☑ ER Annual Cost
☑ First Name	☑ Benefit Event Status	☑ Amount In Force	☑ Imputed Income Per Pay Cost
☑ Middle Name	☑ Benefit Event Date	☑ Amount Pended	☑ Imputed Income Annual Cost
☑ Salutation	☑ Benefit Event End Date	☑ Election Status	
☑ Suffix	☑ Elections Last Saved	☑ Coverage Effective Date	
☑ Date of Birth	☑ Event Expired	☑ Date Elected	

Enrollment Status

The Enrollment Status Report Shows list of employee enrollment events and the events' statuses as of a specific date range. You may filter the report to include only active employees (or other worker statues), specific benefits and specific life events.

Report Parameters:

Enrollment Status Extract

Select your initial filter criteria below and click the Run Report button to return the results. Further filtering can be done after the initial results are returned.

Optionally select a specific employer: <ALL>

Optionally select a specific eligibility set: <ALL>, active, adjuncts, intnIntrmPas, intnTransfer

Optionally select employment statuses to report: <ALL>, Active, Deceased, Disabled, Survivor, Terminated, Leave, Disabled - Pending, Retiree

Optionally select event(s) to report: <ALL>, Age Band Recalculation, Annual ACR Change, Annual Enrollment, Approved Administrative, Beneficiary Change, Birth/Adoption, Change in Employment Eligibility Event - Gain, Change in Employment Eligibility Event - Lose, Change in Medicaid/Medicare/CHIP Eligibility

Optionally enter a specific member ID

Select start date for election retrieval is based on event effective date: 2023-02-06

Select end date for election retrieval is based on event effective date: 2023-03-08

Select as of date: 2023-03-08

Select language: English, Français

Run Report

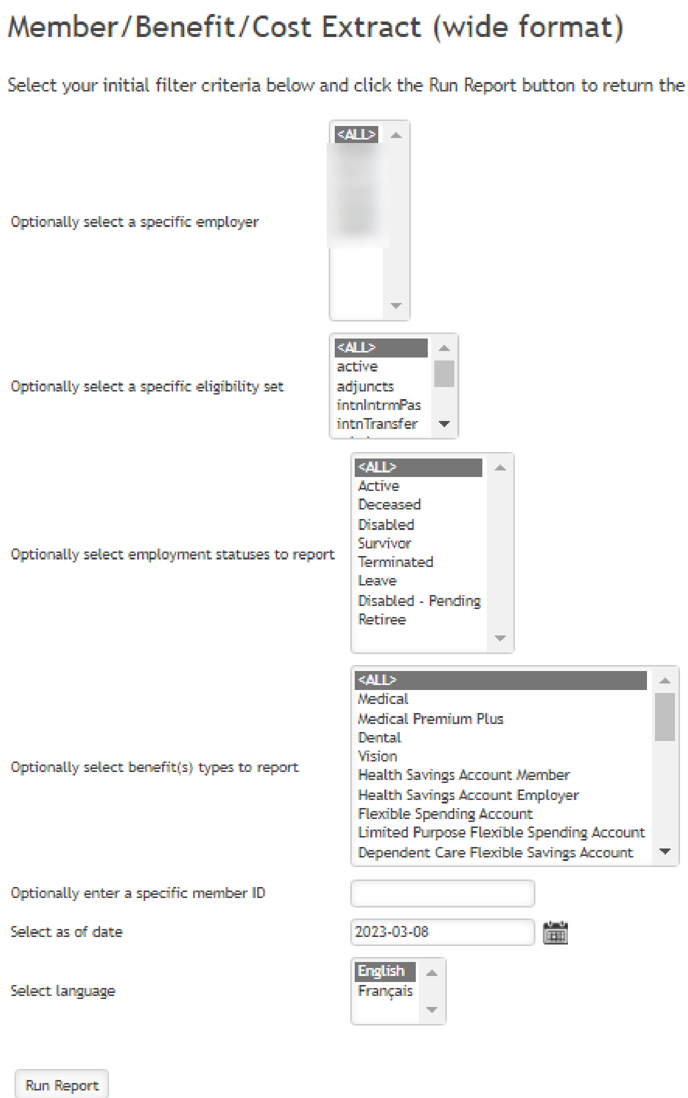
Fields Included in Enrollment Status Results:

- ☑ (All)
- ☑ Employer
- ☑ Employee ID
- ☑ Last NAME
- ☑ First NAME
- ☑ Middle NAME
- ☑ Salutation
- ☑ Suffix
- ☑ Gender
- ☑ Date Of Birth
- ☑ Address Line 1
- ☑ Address Line 2
- ☑ City
- ☑ State
- ☑ Country
- ☑ Zip CODE
- ☑ Email
- ☑ Mailing Address Change Date
- ☑ Mailing Preference Indicator
- ☑ Mailing Preference Indicator Effective Date
- ☑ Member Eligibility Set
- ☑ Member Eligibility Set Effective Date
- ☑ Benefit Event
- ☑ Benefit Event Status
- ☑ Benefit Event Date
- ☑ Elections Last Saved
- ☑ Event End Date
- ☑ Event EXPIRED

Member/Benefit/Cost Extract

The Member/Benefit/Cost Extract shows list of your employees' enrolled benefits, coverage and costs as of a specific date range. You may filter the report to include only active employees (or other worker statues) and specific benefits. A large number of fields (columns) included in the results of this report. To reduce the size of this report, we recommend filtering by only benefit type(s) you're interested in viewing.

Report Parameters:



Member/Benefit/Cost Extract (wide format)

Select your initial filter criteria below and click the Run Report button to return the results. Further filtering can be done after the initial results are returned.

Optionally select a specific employer: <ALL>

Optionally select a specific eligibility set: <ALL>, active, adjuncts, intnIntrmPas, intnTransfer

Optionally select employment statuses to report: <ALL>, Active, Deceased, Disabled, Survivor, Terminated, Leave, Disabled - Pending, Retiree

Optionally select benefit(s) types to report: <ALL>, Medical, Medical Premium Plus, Dental, Vision, Health Savings Account Member, Health Savings Account Employer, Flexible Spending Account, Limited Purpose Flexible Spending Account, Dependent Care Flexible Savings Account

Optionally enter a specific member ID

Select as of date: 2023-03-08

Select language: English, Français

Run Report

Fields Included in Member/Benefit/Cost Extract Results (sample):

Note: EE = Employee; ER = Employer. EE costs will display for CHP only if your ministry provided your cost share to CPS.

- [x] (All)
- [x] As Of Date
- [x] Employer
- [x] Employee ID
- [x] Last Name
- [x] First Name
- [x] Middle Name
- [x] Salutation
- [x] Suffix
- [x] SSN
- [x] Address Line 1
- [x] Address Line 2
- [x] City
- [x] State
- [x] Country
- [x] Zip Code
- [x] Mailing Address Change Date
- [x] Bad Address Indicator
- [x] Mailing Preference Indicator
- [x] Mailing Preference Indicator Eff Date
- [x] Member Eligibility Set
- [x] Member Eligibility Set Eff Date
- [x] Employment Status Code
- [x] Gender
- [x] Date Of Birth
- [x] Date Of Death

- [x] Health Savings Account Employer Plan Description
- [x] Health Savings Account Employer Option Description
- [x] Health Savings Account Employer Amount Elected
- [x] Health Savings Account Employer Amount Inforce
- [x] Health Savings Account Employer EE Monthly Cost
- [x] Health Savings Account Employer ER Monthly Cost
- [x] Health Savings Account Employer Imputed Income Per Pay Cost
- [x] Health Savings Account Employer Imputed Income Annual Cost
- [x] Flexible Spending Account Plan Description
- [x] Flexible Spending Account Option Description
- [x] Flexible Spending Account Amount Elected
- [x] Flexible Spending Account Amount Inforce
- [x] Flexible Spending Account EE Monthly Cost
- [x] Flexible Spending Account ER Monthly Cost
- [x] Flexible Spending Account Imputed Income Per Pay Cost
- [x] Flexible Spending Account Imputed Income Annual Cost
- [x] Limited Purpose Flexible Spending Account Plan Description
- [x] Limited Purpose Flexible Spending Account Option Description
- [x] Limited Purpose Flexible Spending Account Amount Elected
- [x] Limited Purpose Flexible Spending Account Amount Inforce
- [x] Limited Purpose Flexible Spending Account EE Monthly Cost
- [x] Limited Purpose Flexible Spending Account ER Monthly Cost
- [x] Limited Purpose Flexible Spending Account Imputed Income Per Pay Cost
- [x] Limited Purpose Flexible Spending Account Imputed Income Annual Cost
- [x] Health Reimbursment Arrangement Plan Description
- [x] Health Reimbursment Arrangement Option Description

- [x] Accidental Death & Dismemberment EE Monthly Cost
- [x] Accidental Death & Dismemberment ER Monthly Cost
- [x] Accidental Death & Dismemberment Imputed Income Per Pay Cost
- [x] Accidental Death & Dismemberment Imputed Income Annual Cost
- [x] Accidental Injury Insurance Plan Description
- [x] Accidental Injury Insurance Option Description
- [x] Accidental Injury Insurance Amount Elected
- [x] Accidental Injury Insurance Amount Inforce
- [x] Accidental Injury Insurance EE Monthly Cost
- [x] Accidental Injury Insurance ER Monthly Cost
- [x] Accidental Injury Insurance Imputed Income Per Pay Cost
- [x] Accidental Injury Insurance Imputed Income Annual Cost
- [x] Critical Illness Employee Plan Description
- [x] Critical Illness Employee Option Description
- [x] Critical Illness Employee Amount Elected
- [x] Critical Illness Employee Amount Inforce
- [x] Critical Illness Employee EE Monthly Cost
- [x] Critical Illness Employee ER Monthly Cost
- [x] Critical Illness Employee Imputed Income Per Pay Cost
- [x] Critical Illness Employee Imputed Income Annual Cost
- [x] Critical Illness Spouse Plan Description
- [x] Critical Illness Spouse Option Description
- [x] Critical Illness Spouse Amount Elected
- [x] Critical Illness Spouse Amount Inforce
- [x] Critical Illness Spouse EE Monthly Cost
- [x] Critical Illness Spouse ER Monthly Cost

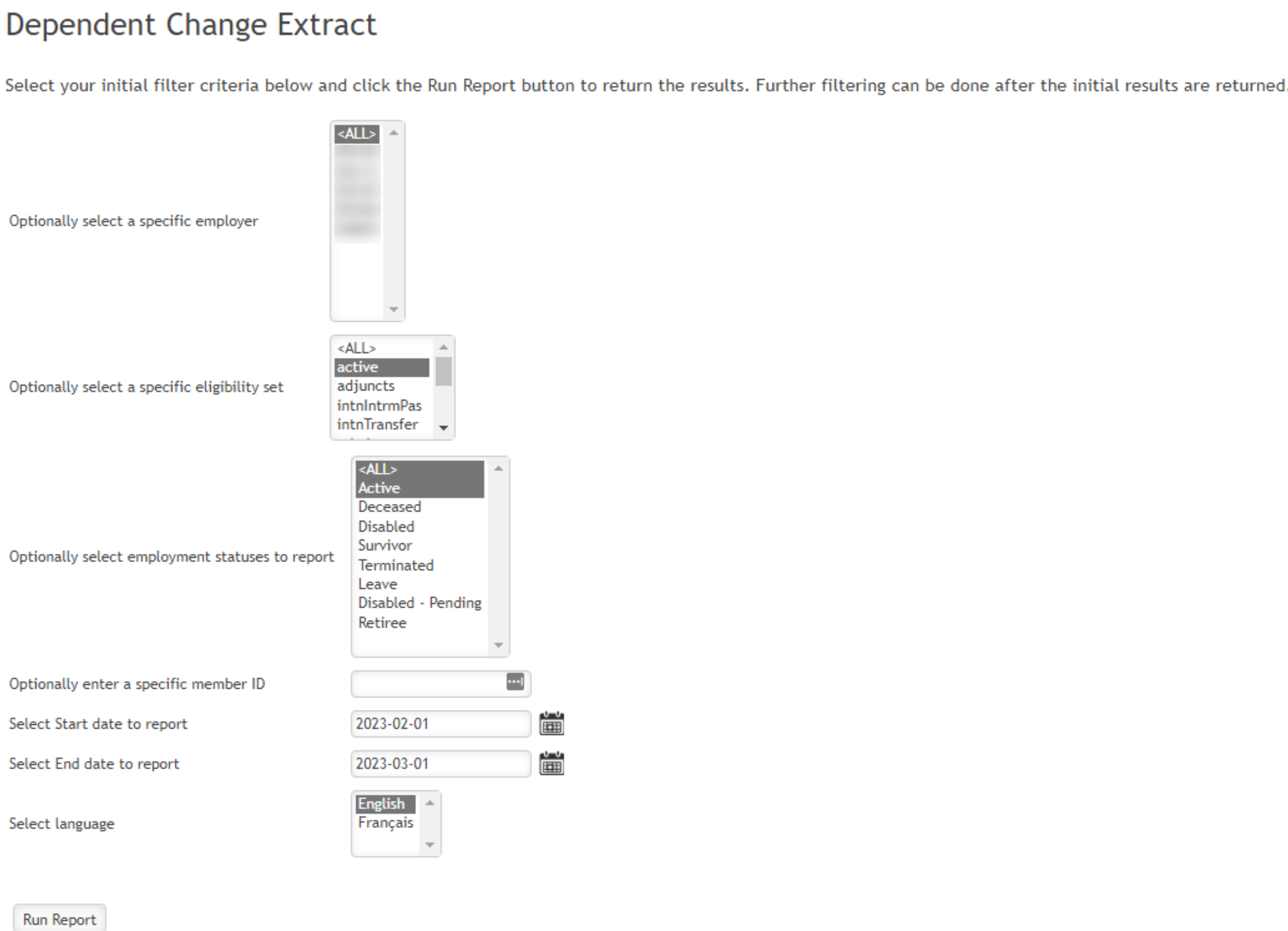
- [x] CRSP 403(b) After-Tax Roth Percentage Plan Description
- [x] CRSP 403(b) After-Tax Roth Percentage Option Description
- [x] CRSP 403(b) After-Tax Roth Percentage Amount Elected
- [x] CRSP 403(b) After-Tax Roth Percentage Amount Inforce
- [x] CRSP 403(b) After-Tax Roth Percentage EE Monthly Cost
- [x] CRSP 403(b) After-Tax Roth Percentage ER Monthly Cost
- [x] CRSP 403(b) After-Tax Roth Percentage Imputed Income Per Pay Cost
- [x] CRSP 403(b) After-Tax Roth Percentage Imputed Income Annual Cost
- [x] Concordia Retirement Plan (Pension) Plan Description
- [x] Concordia Retirement Plan (Pension) Option Description
- [x] Concordia Retirement Plan (Pension) Amount Elected
- [x] Concordia Retirement Plan (Pension) Amount Inforce
- [x] Concordia Retirement Plan (Pension) EE Monthly Cost
- [x] Concordia Retirement Plan (Pension) ER Monthly Cost
- [x] Concordia Retirement Plan (Pension) Imputed Income Per Pay Cost
- [x] Concordia Retirement Plan (Pension) Imputed Income Annual Cost
- [x] Basic Life - Employee Plan Description
- [x] Basic Life - Employee Option Description
- [x] Basic Life - Employee Amount Elected
- [x] Basic Life - Employee Amount Inforce
- [x] Basic Life - Employee EE Monthly Cost
- [x] Basic Life - Employee ER Monthly Cost
- [x] Basic Life - Employee Imputed Income Per Pay Cost
- [x] Basic Life - Employee Imputed Income Annual Cost
- [x] Basic Life - Spouse Plan Description
- [x] Basic Life - Spouse Option Description

Dependent Change Extract

The Dependent Change Extract lists changes to your workers' dependents that occurred within a specific time period, including the previous benefit values and the new benefit values. You may filter the report to include only active employees (or other worker statues).

Hint: Use the calendar icon to enter your date range or type your dates in a YYYY-MM-DD format.

Report Parameters:



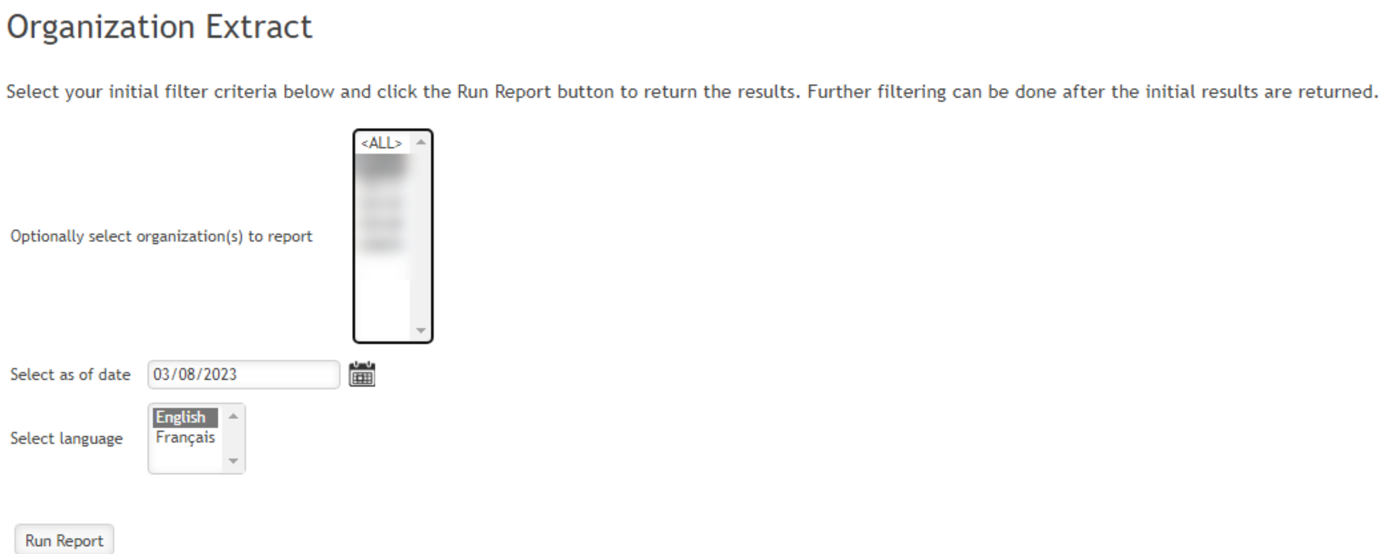
Fields Included in Dependent Change Extract Results:

☑ (All)	☑ Middle Name	☑ Change Type	☑ Coverage Effective Date
☑ Employer	☑ Salutation	☑ Dependent Name	☑ Coverage Term Date
☑ Employee ID	☑ Suffix	☑ Dependent Date of Birth	☑ Disabled Status
☑ First Name	☑ Event Name	☑ Relationship	☑ Dependent Status
☑ Last Name	☑ Effective Date of the Change	☑ Benefit	☑ QMOSCO Status

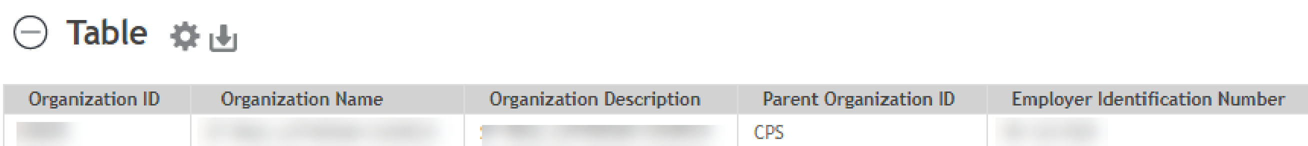
Organization Extract

The Organization Extract displays your ministry's CPS Employer ID (organization ID) and Federal ID number (Employer Identification Number.)

Report Parameters:



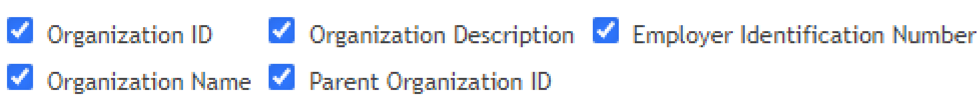
Organization Extract Results:



Table

Organization ID	Organization Name	Organization Description	Parent Organization ID	Employer Identification Number
[illegible]	[illegible]	[illegible]	CPS	[illegible]

Fields Included in User Account Extract Results:



Organization Benefits

The Organization Benefits Report displays a listing of the benefits offered by your ministry.

Report Parameters:

Organization Benefits Extract

Select your initial filter criteria below and click the Run Report button to return the results. Further filtering can be done after the initial results are returned.

Optionally select organization(s) to report

<ALL>
07015
07026

Optionally select benefit(s) to report

<ALL>
Accidental Injury Insurance
Basic Life
Basic Spouse Life
Travel Accident Insurance
Basic Child Life
Critical Illness Child
Critical Illness Employee
Critical Illness Spouse
Dependent Care Flexible Savings Account

Select as of date 04/18/2023

Select language

English
Français

Run Report

Organization Benefits Results:

Table

Page 1 of 13

Organization ID	Organization Name		Parent Organization ID	Employer Identification Number	Benefit Description	Plan Description	Feature Description	Feature Number Value	Feature String Value

Fields Included in Dependent Extract Results:

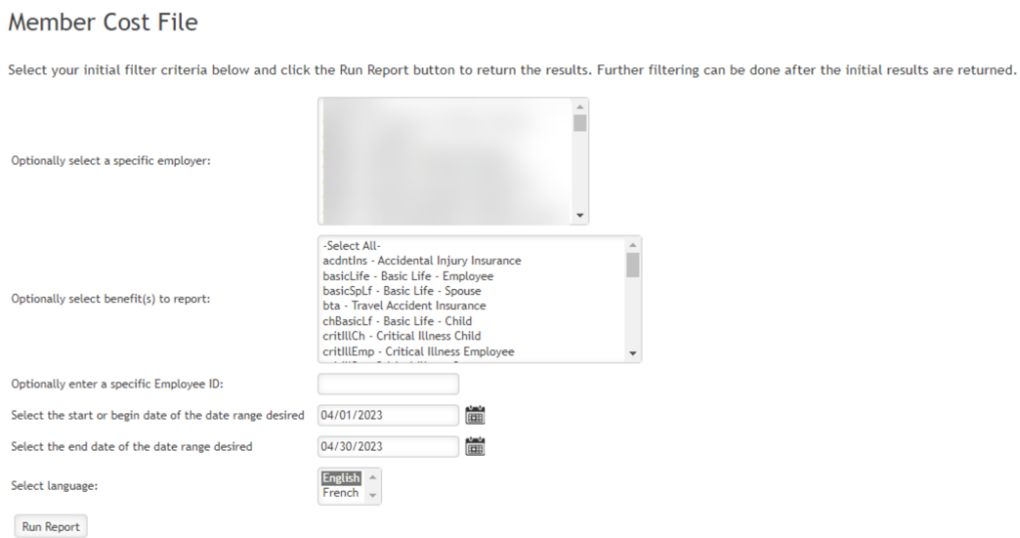
- ☑ (All)
- ☑ As Of Date
- ☑ Organization ID
- ☑ Organization Name
- ☑
- ☑ Parent Organization ID
- ☑ Employer Identification Number
- ☑ Benefit Description
- ☑ Plan Description
- ☑ Feature Description
- ☑ Feature Number Value
- ☑ Feature String Value

Custom Reports

Member Cost File

The Member Cost File provides details about the benefit changes that occurred between two dates. The Member Cost information provided on your monthly mailed provides data from this report.

Report Parameters:


Member Cost File

Select your initial filter criteria below and click the Run Report button to return the results. Further filtering can be done after the initial results are returned.

Optionally select a specific employer:

Optionally select benefit(s) to report:

-Select All-
acdntIns - Accidental Injury Insurance
basicLife - Basic Life - Employee
basicSpLf - Basic Life - Spouse
bta - Travel Accident Insurance
chBasicLf - Basic Life - Child
critIllCh - Critical Illness Child
critIllEmp - Critical Illness Employee

Optionally enter a specific Employee ID:

Select the start or begin date of the date range desired 04/01/2023

Select the end date of the date range desired 04/30/2023

Select language: English French

Run Report

Fields Included in Member Cost File Results:

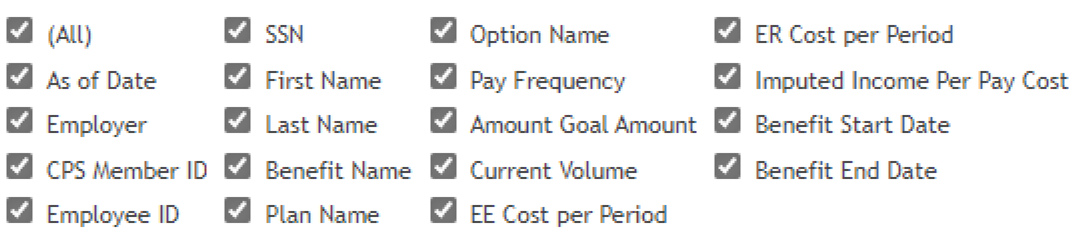
☑ (All)	☑ SSN	☑ Option Name	☑ ER Cost per Period
☑ Report Date	☑ First Name	☑ Pay Frequency	☑ Imputed Income Per Pay Cost
☑ Employer	☑ Last Name	☑ Amount Goal Amount	☑ Benefit Start Date
☑ CPS Member ID	☑ Benefit Name	☑ Current Volume	☑ Benefit End Date
☑ Employee ID	☑ Plan Name	☑ EE Cost per Period	☑ Benefit Change Date

Member Cost Full File

The Member Cost Full File provides a current view (enrolled benefits) of each member's coverage and costs as of specified coverage effective date.

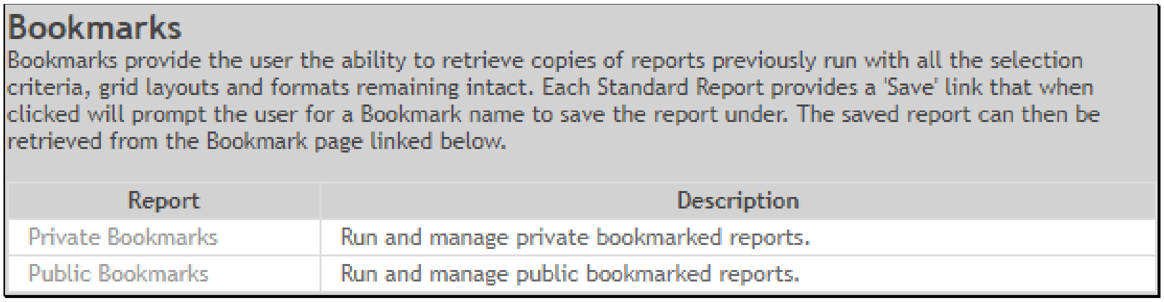
Report Parameters:

Fields Included in Member Cost File Results:



Bookmarks

Bookmarks provide the ability to retrieve copies of report structures that were run previously. All selection criteria, grid layouts, and formats from the bookmarked reports remain intact. After running each Standard Report there will appear a pair of buttons, **Private Bookmark** and **Public Bookmark**, that when clicked prompt the user to name the report for saving. The saved report may be retrieved later from the appropriate Bookmark link.



Bookmarks

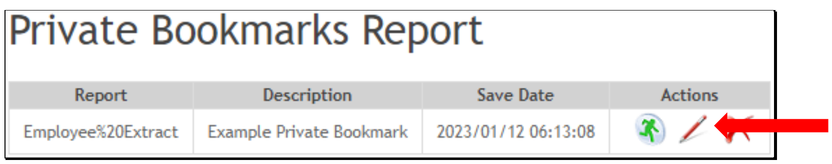
Bookmarks provide the user the ability to retrieve copies of reports previously run with all the selection criteria, grid layouts and formats remaining intact. Each Standard Report provides a 'Save' link that when clicked will prompt the user for a Bookmark name to save the report under. The saved report can then be retrieved from the Bookmark page linked below.

Report	Description
Private Bookmarks	Run and manage private bookmarked reports.
Public Bookmarks	Run and manage public bookmarked reports.

Private Bookmarks are available only for the user who created them.

Report	Description
Private Bookmarks	Run and manage private bookmarked reports.
Public Bookmarks	Run and manage public bookmarked reports.

- Click the **Private Bookmarks** link.
  The previously saved Private Bookmark from the earlier example displays.



Private Bookmarks Report

Report	Description	Save Date	Actions
Employee%20Extract	Example Private Bookmark	2023/01/12 06:13:08	

Three icons display to the right of each saved bookmark:

- **Run** (running person) – runs the report using the previously saved parameters
- **Edit** (pencil) – opens a dialog box for renaming the report bookmark
- **Delete** (X) – opens a dialog box, prompting the user to confirm deletion of the bookmark
- Click the **Run** icon to open a report from its bookmark.

  The report opens. Note that the report shows current data that matches the saved parameters. It may differ in content from the last run instance of the report.

Public Bookmarks are available for all users, regardless of who created them. Because these are available to all users, we recommend you do not use this function.

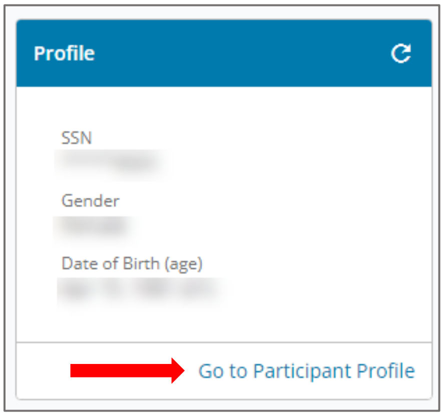
Exploring the Participant Profile

The Participant Summary screen displays a snapshot of the member's information, including cards for **Profile**, **Dependents**, **Coverage**, **Finance**, and **Required Documents**. The Participant menu is where you can perform a majority of your benefits administration functions.

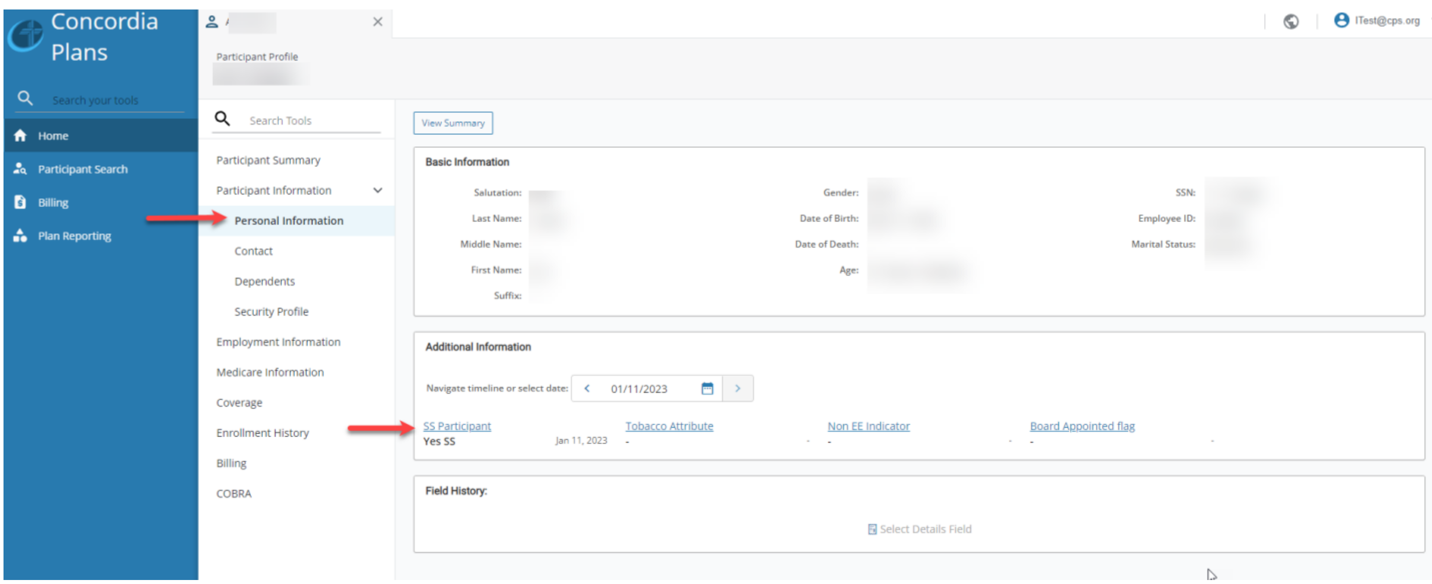
Click the link at the bottom of each card to open a screen with more information.

Profile

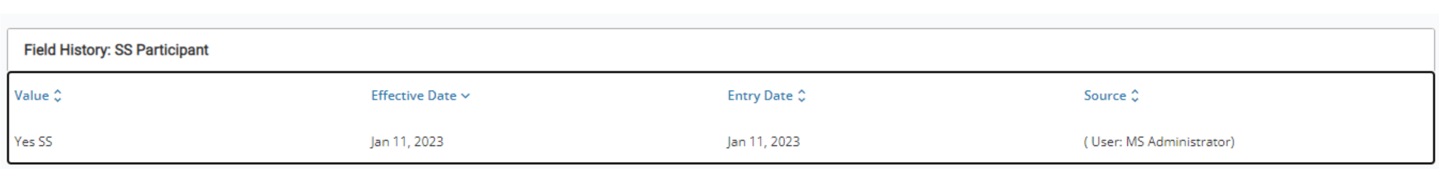
The Profile Screen displays sections for Basic and Additional Information about the selected member.



1. Click the **Go to Participant Profile** link.
   The Personal Information screen displays and is highlighted on the member navigation menu.



If data displays for a link, click a link to display its updates in the **Field History** section.
Field History shows the date of the change and value that was entered on that date.

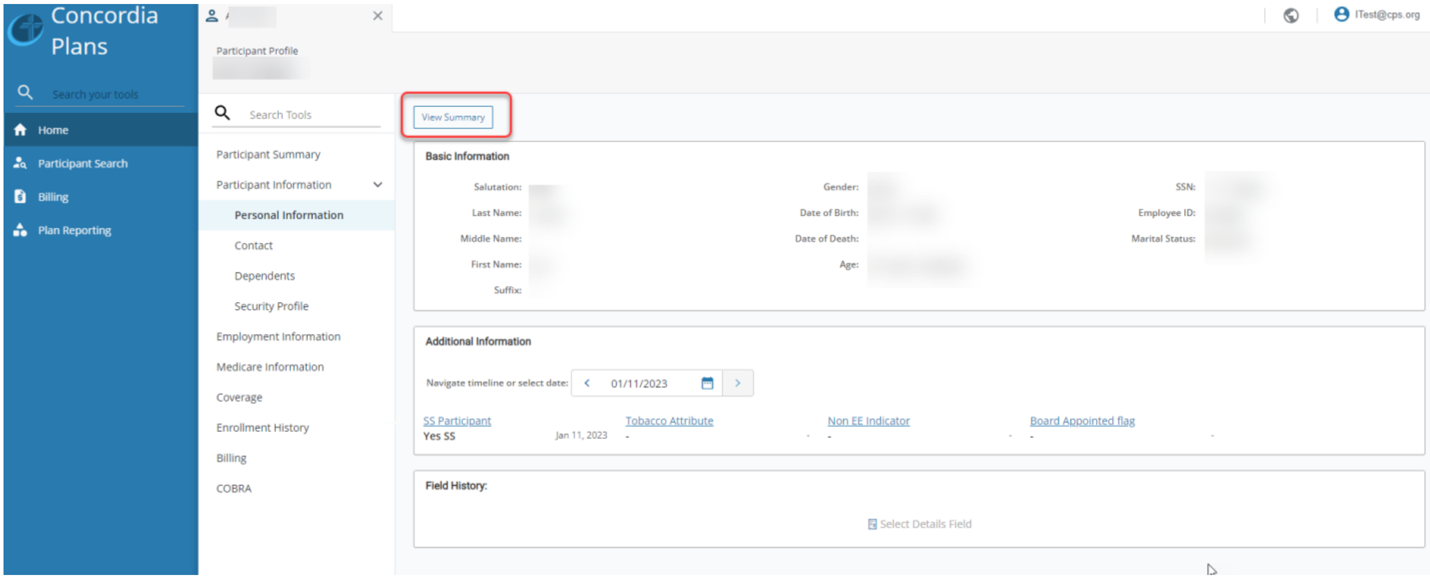


Field History: SS Participant

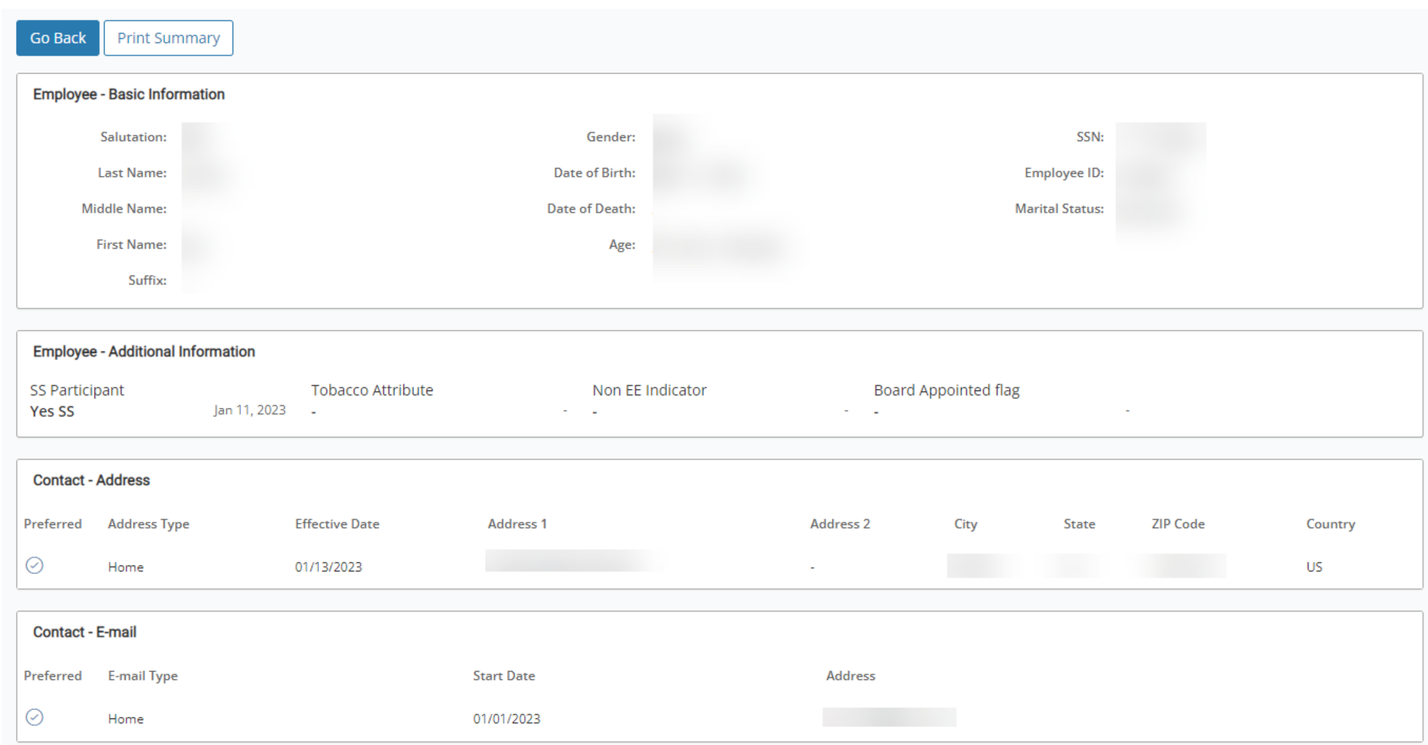
Value	Effective Date	Entry Date	Source
Yes SS	Jan 11, 2023	Jan 11, 2023	(User: MS Administrator)

View Summary

Note the row of buttons at the top of the Personal Information screen. The **Summary** screen displays detailed demographic information for the selected member. Scroll down to view Employment Information, Coverage, Dependent Information and Beneficiary Associations.

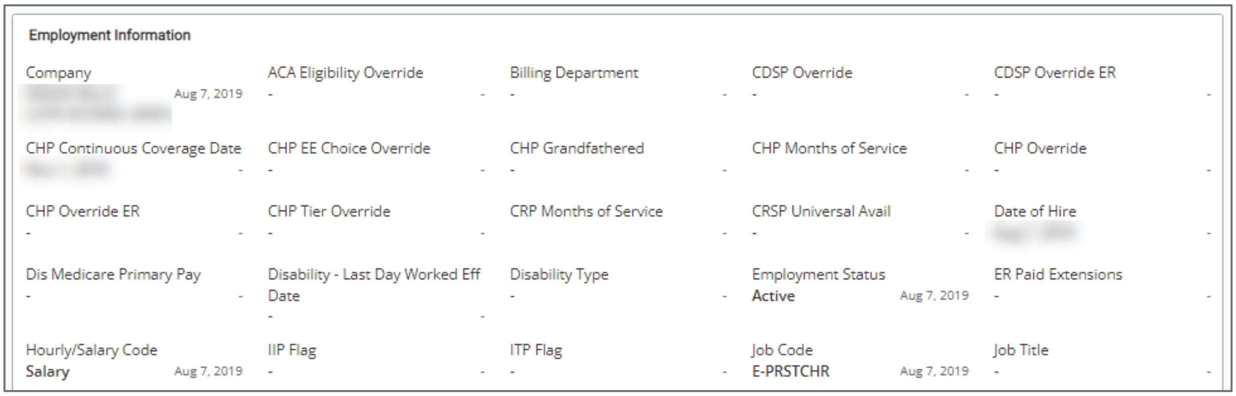


1. Click the **View Summary** button.
   The Employee – Basic Information, Additional Information, and Contact sections display.



2. Scroll down to view the member's **Employment Information** section.

This section includes the member's current employment and salary details.

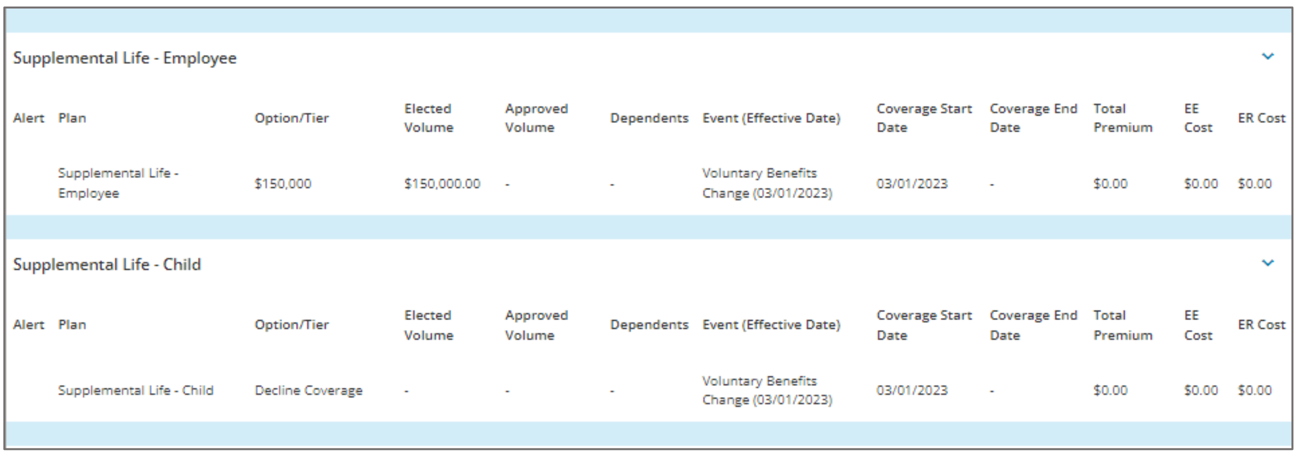


Employment Information

Company	[redacted]	Aug 7, 2019
ACA Eligibility Override	-	-
Billing Department	-	-
CDSP Override	-	-
CDSP Override ER	-	-
CHP Continuous Coverage Date	[redacted]	-
CHP EE Choice Override	-	-
CHP Grandfathered	-	-
CHP Months of Service	-	-
CHP Override	-	-
CHP Override ER	-	-
CHP Tier Override	-	-
CRP Months of Service	-	-
CRSP Universal Avail	-	-
Date of Hire	[redacted]	-
Dis Medicare Primary Pay	-	-
Disability - Last Day Worked Eff Date	-	-
Disability Type	-	-
Employment Status	Active	Aug 7, 2019
ER Paid Extensions	-	-
Hourly/Salary Code	Salary	Aug 7, 2019
IIP Flag	-	-
ITP Flag	-	-
Job Code	E-PRSTCHR	Aug 7, 2019
Job Title	-	-

Scroll down to view the member's **Coverage** section.
This section includes the member's current coverage details.

Note: The first "Event" you will see for all of your workers is called "Conversion Recalc." This indicates the date that the member's information was transferred into the Lifeworks Employer Portal.



Supplemental Life - Employee

Alert	Plan	Option/Tier	Elected Volume	Approved Volume	Dependents	Event (Effective Date)	Coverage Start Date	Coverage End Date	Total Premium	EE Cost	ER Cost
	Supplemental Life - Employee	$150,000	$150,000.00	-	-	Voluntary Benefits Change (03/01/2023)	03/01/2023	-	$0.00	$0.00	$0.00

Supplemental Life - Child

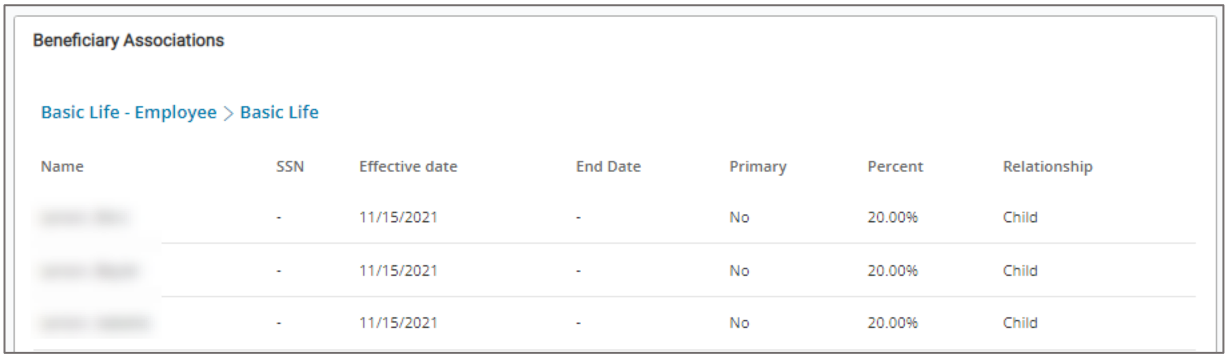
Alert	Plan	Option/Tier	Elected Volume	Approved Volume	Dependents	Event (Effective Date)	Coverage Start Date	Coverage End Date	Total Premium	EE Cost	ER Cost
	Supplemental Life - Child	Decline Coverage	-	-	-	Voluntary Benefits Change (03/01/2023)	03/01/2023	-	$0.00	$0.00	$0.00

3. Scroll down to view the member's **Dependent Information** section.
This section includes the names of the member's dependents and their eligibility statuses.

Dependent Information

Name	SSN	Relationship	Gender	Status
[redacted]	[redacted]	Child	Female	Eligible Dependent

4. Scroll down to view the member's **Beneficiary Associations and Medicare** sections.
   These sections include the names of the member's beneficiaries and the member's Medicare status. If the member has not allocated any beneficiaries, you will see "No items to display."

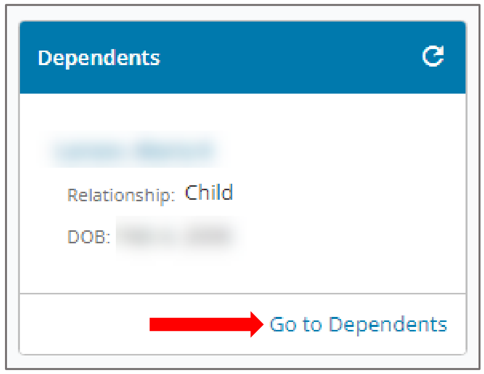


5. When finished viewing this screen, scroll to the top and click **Go Back** to return to the main profile view.

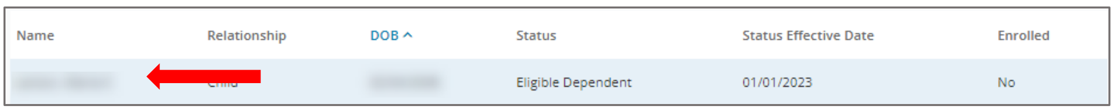
Dependents

Click the Participant Summary link in the left navigation menu to return to the summary page.

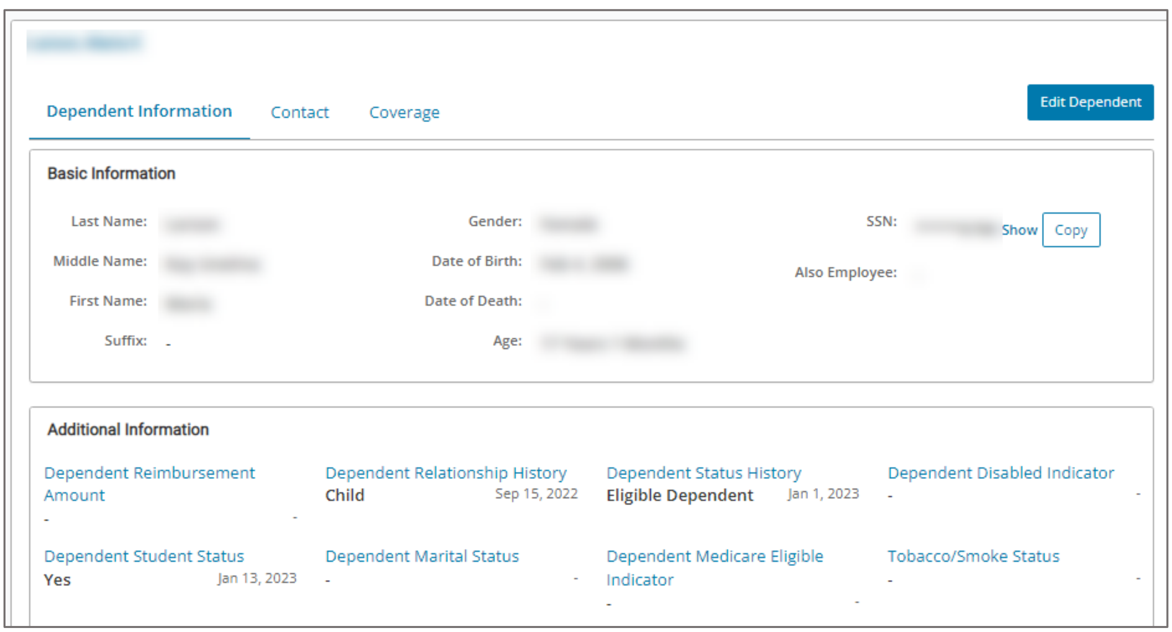
The Dependents card shows you the member's dependent information.



1. Click **Participant Summary** on the member's navigation menu and click the **Go to Dependents** link from the Dependents widget.
   The list of the member's dependents displays.



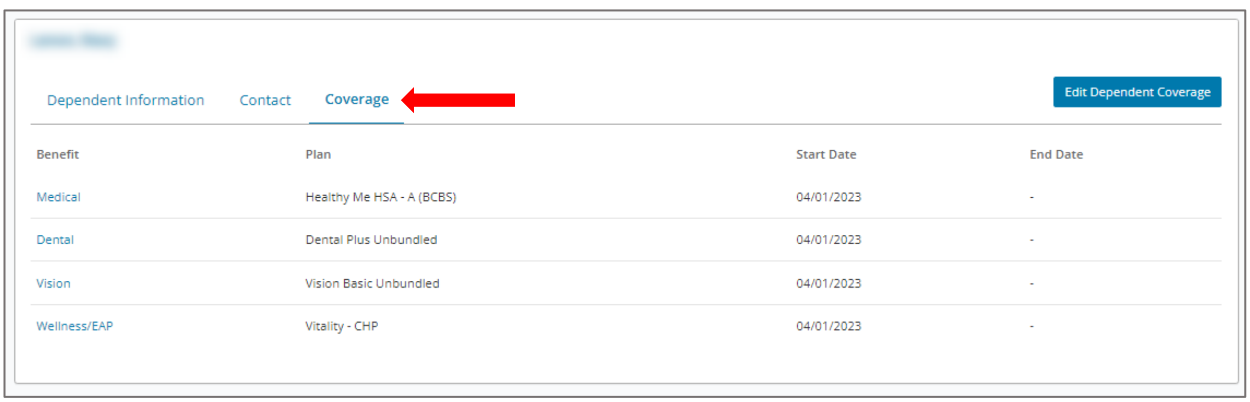
2. If more than one dependent displays, click a dependent's name to display the details.



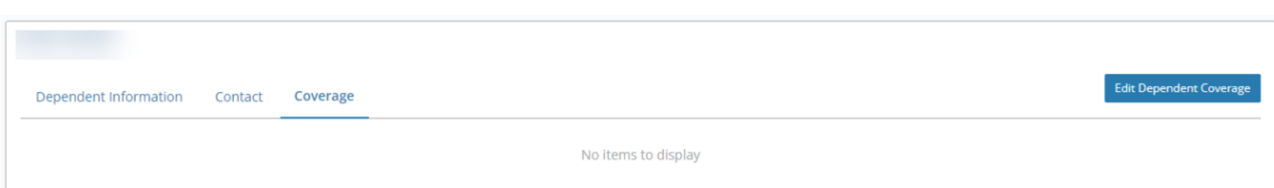
3. Click a link in the Additional Information section to see its Entry Date in the Field History section.

4. Click the **Contact** link to display the dependent's contact information. If the Dependent's address is the same as the member's (most common), you will see "Participant's preferred address."

5. Click the **Coverage** link to display the dependent's health coverage information (if applicable).



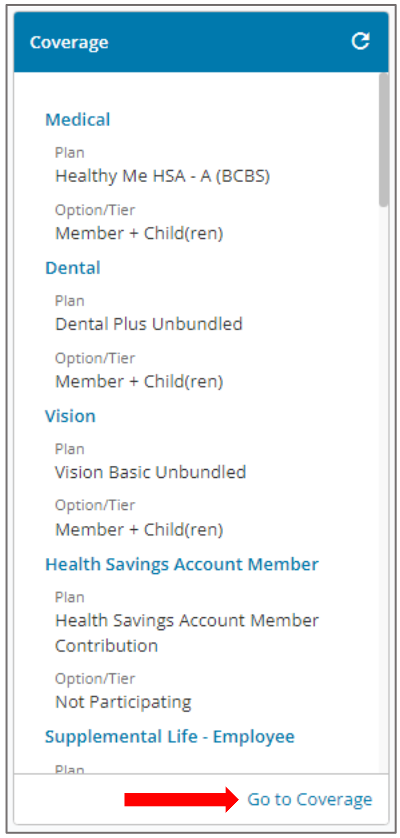
If your ministry does not offer the Concordia Health Plan (CHP) or the dependent is not enrolled in the CHP, you will see the message "No items to display" on this screen.



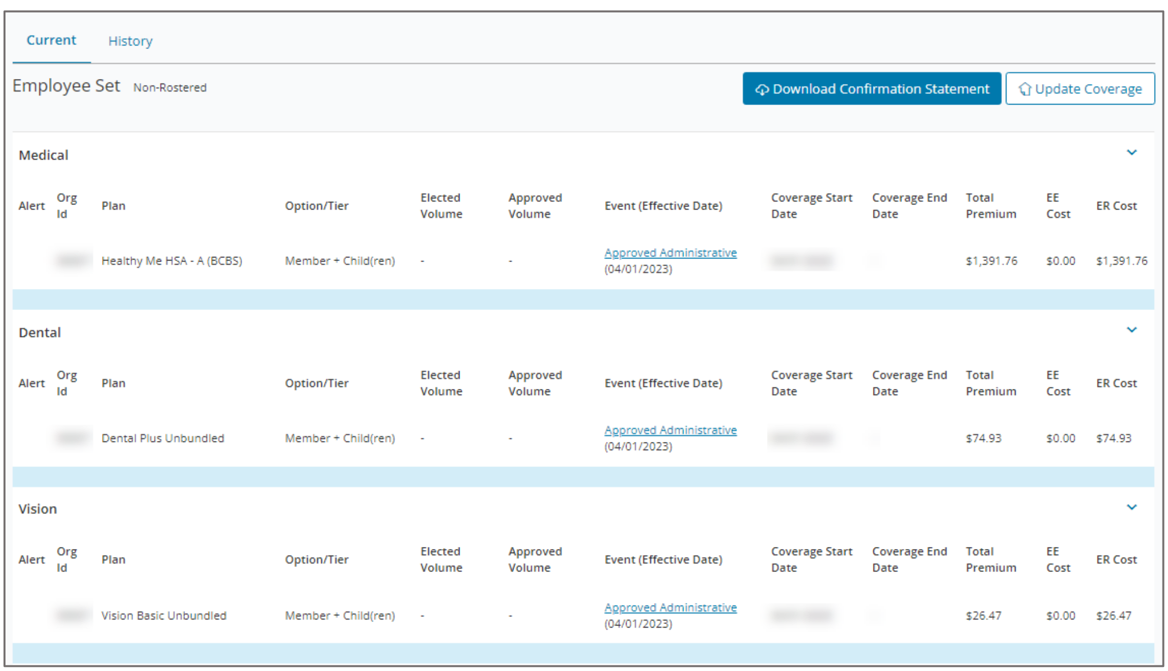
Coverage

Click the Participant Summary link in the left navigation menu to return to the summary page.

The Coverage card shows you the member's current and historical coverage information.

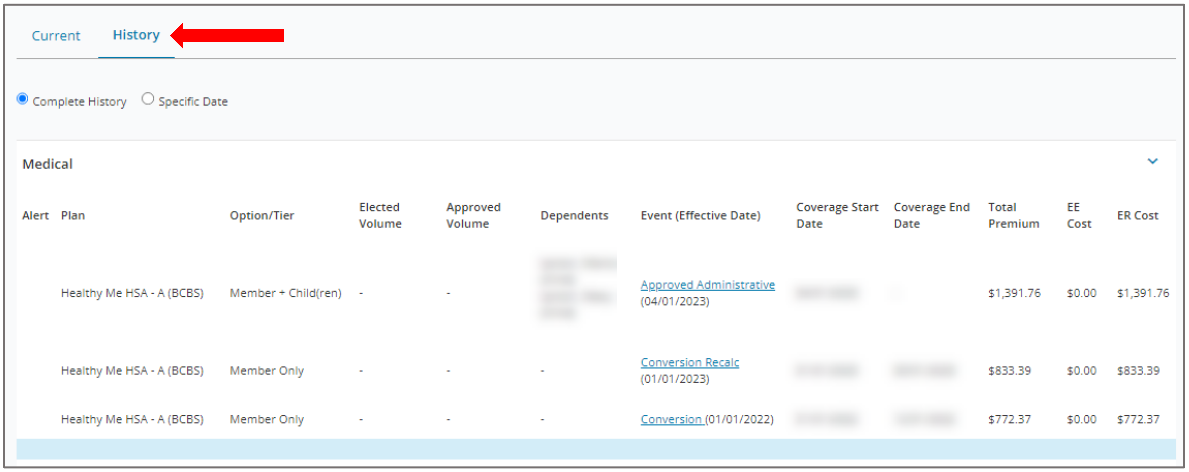


1. Click the **Go to Coverage** link from the Coverage card to view details regarding the member's current coverage.

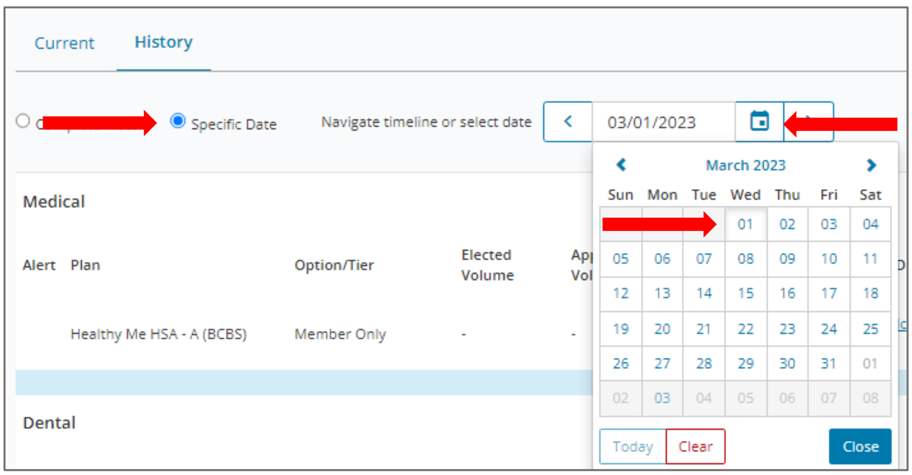


2. Scroll down the screen to review all member and dependent coverage information.

3. Click the **History** link.
   The member's complete coverage history shows. This tab also includes coverage elections that have already been entered and will take effect in the future.



4. To view the member's coverage on a specific date, click the **Specific Date** option.

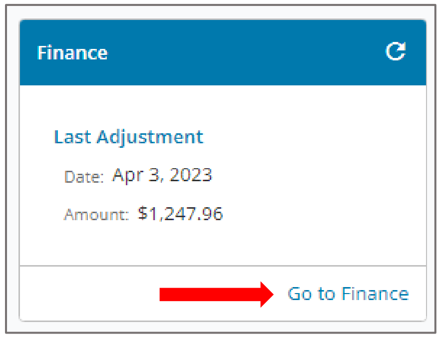


5. Click the **calendar icon** to select a new date.
   The system shows coverage data as of the selected date.

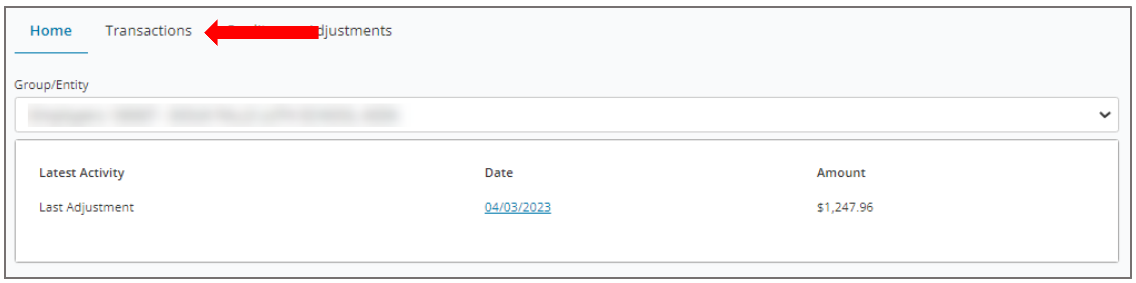
Finance

Click the Participant Summary link in the left navigation menu to return to the summary page.

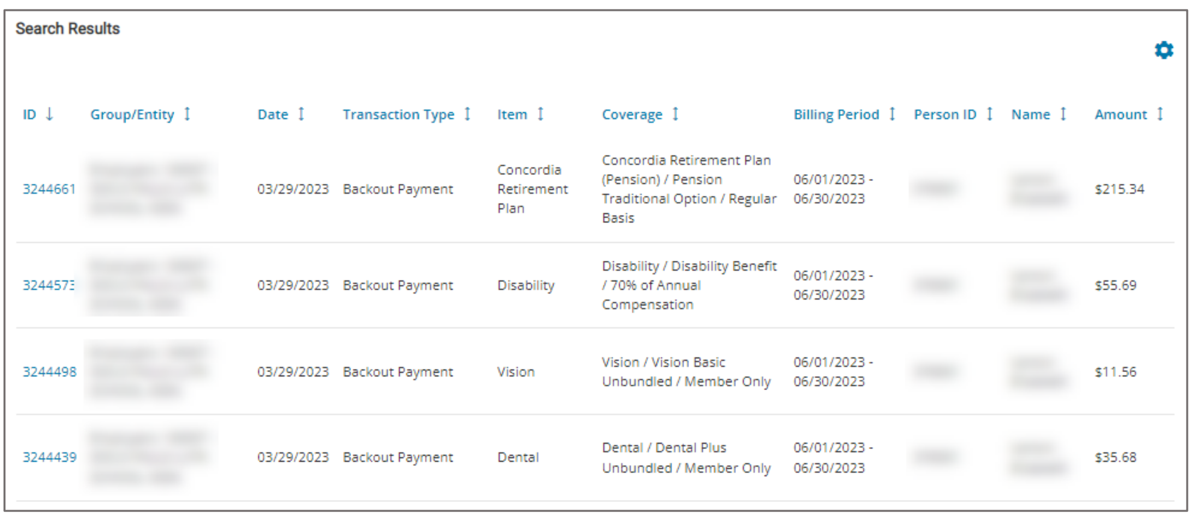
The Finance card displays the member's Billing screen.



1. Click the **Go to Finance** link from the Finance card to view the member's billing data with the Latest Activity.



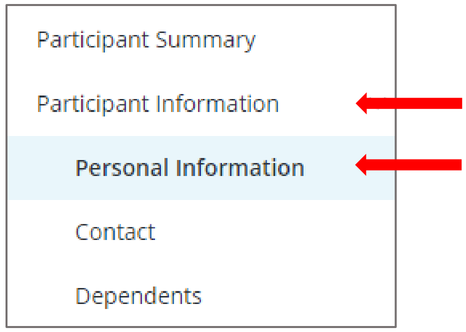
2. Click the **Transactions** link.
   The member's invoiced benefits display on the screen.



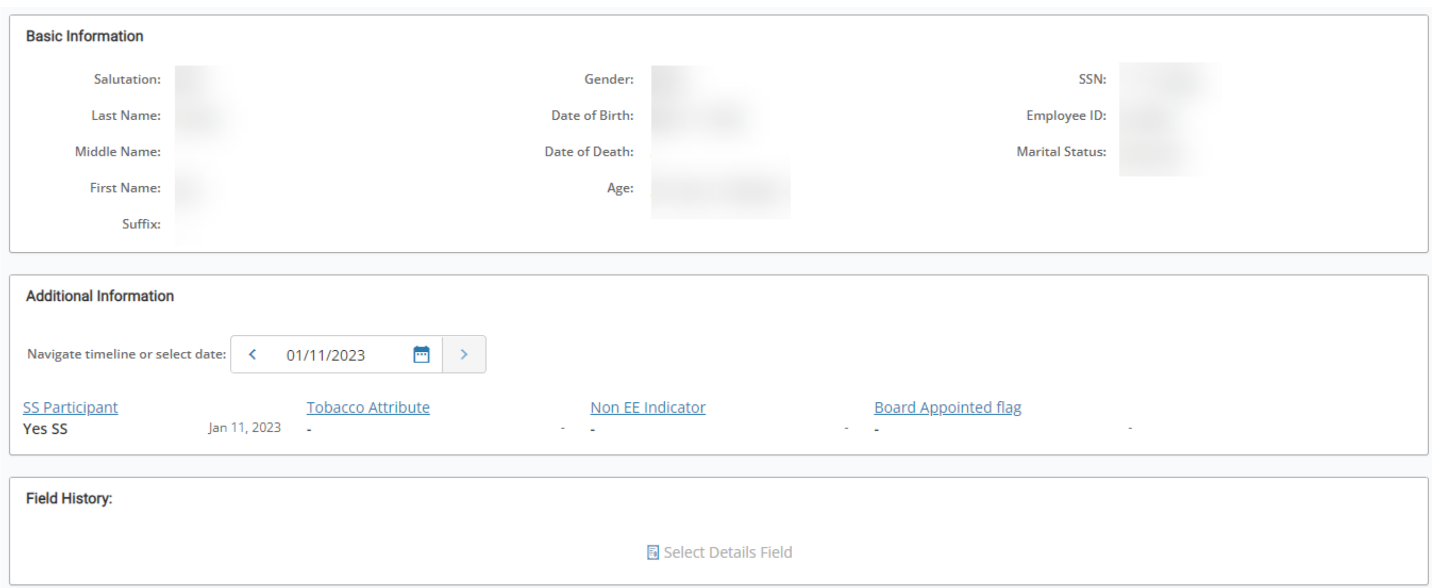
Note: The ID number listed is a system-generated number for the specific benefit. It is not the same as the invoice number.

Participant Information

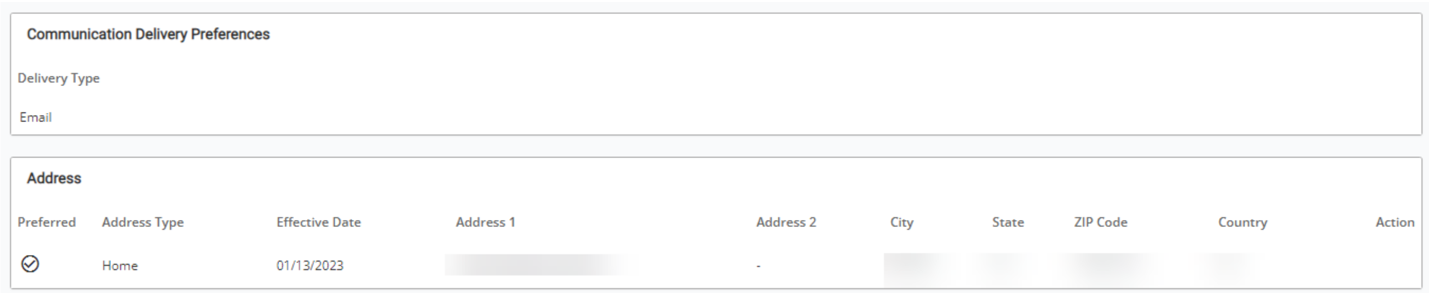
Another way to view information in the Participant Profile is to use the **Participant Information** tab on the member navigation menu. Click **Participant Information** to view the following list of subcommands.



1. **Personal Information**
   This screen displays the same data as in the Profile section.



2. **Contact**: This screen displays the same data as with the View Summary option. It also shows you the member's preferred communication preference (email or mail.)


Communication Delivery Preferences

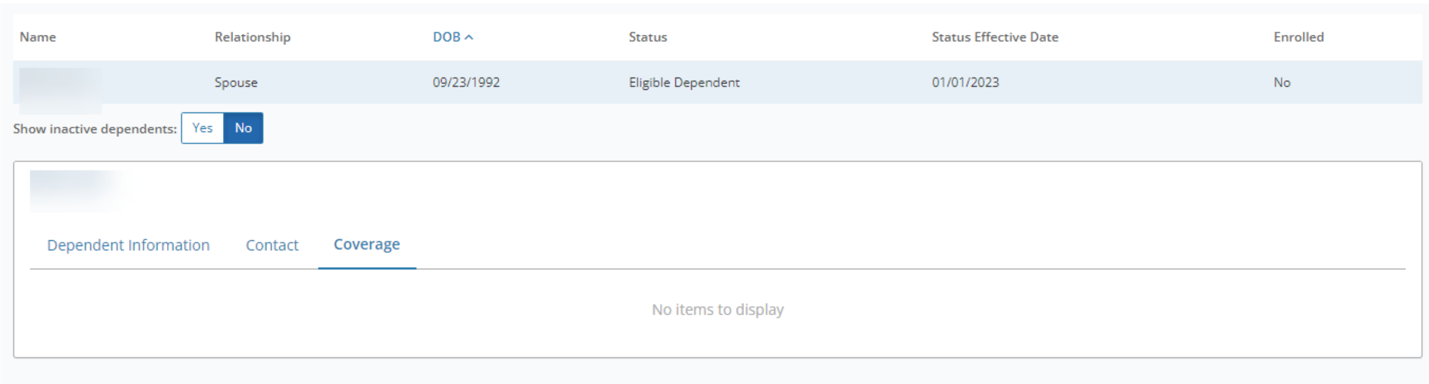
Delivery Type

Email

Address

Preferred	Address Type	Effective Date	Address 1	Address 2	City	State	ZIP Code	Country	Action
✓	Home	01/13/2023		-					

3. **Dependents**.
This screen displays the data as with the Dependents option.


Name	Relationship	DOB	Status	Status Effective Date	Enrolled
	Spouse	09/23/1992	Eligible Dependent	01/01/2023	No

Show inactive dependents: Yes No

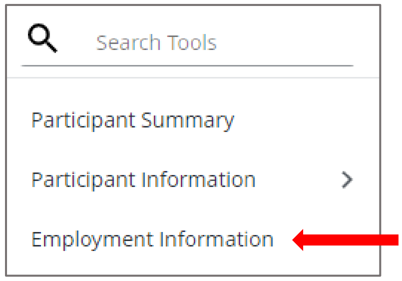
Dependent Information Contact Coverage

No items to display

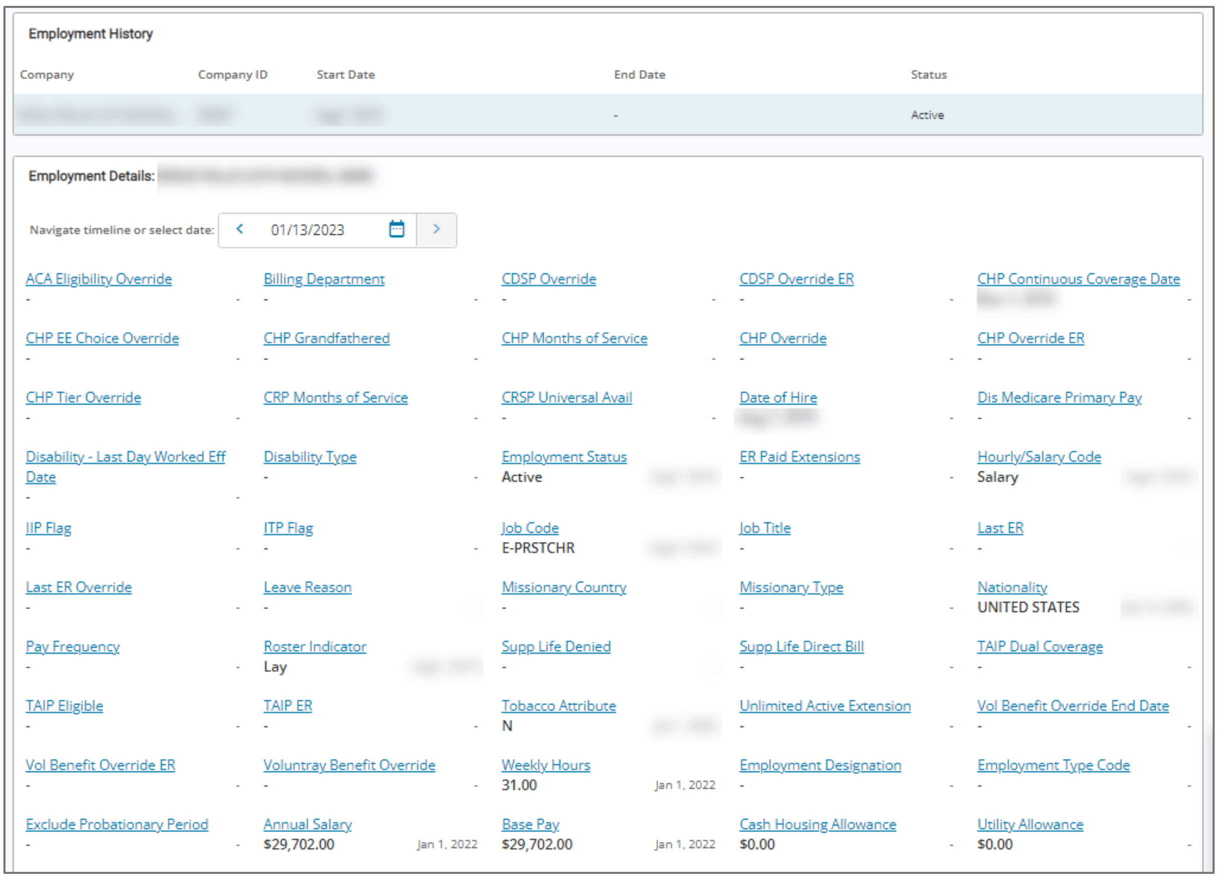
Employment Information

After clicking the icon in the Actions column of your participant list, you will see the member’s participant profile. In the left navigation menu, you’ll see a list of options of types of information you can view for that member.

Employment Information provides details about a member’s employment history, employment details, and history for each field.

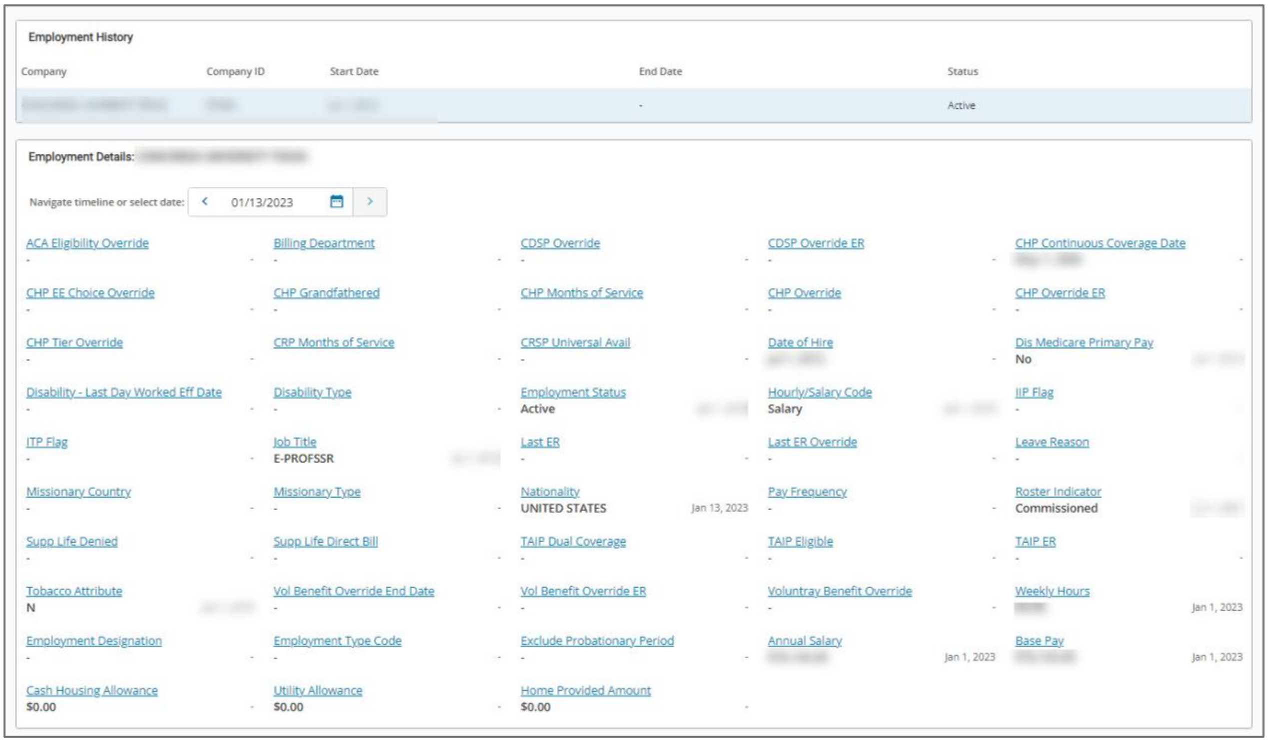


1. Click **Employment Information** on the member navigation menu.
   The Employment History and Details screen displays.



Employment History

The Employment History section shows the member’s employment details with their employer.

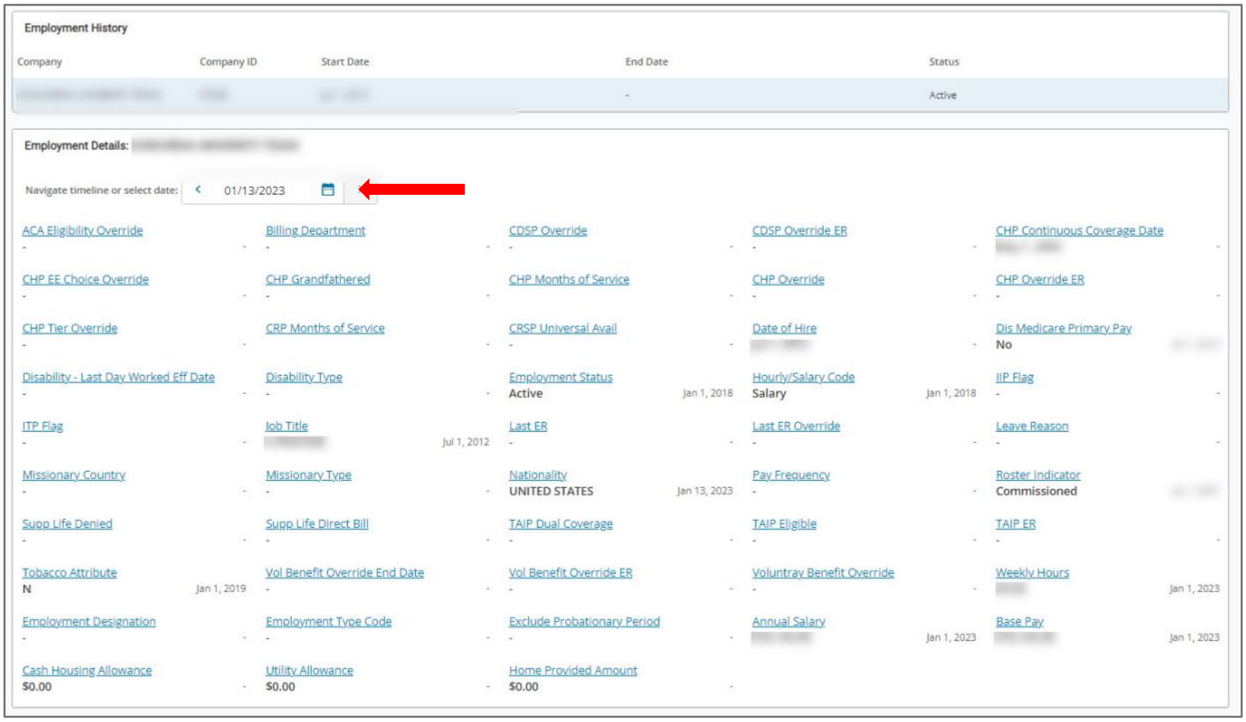


Employment Details

The **Employment Details** section displays the status for a selected company. Fields include pay rates and scheduled hours.

To view the employment details for a specific date:

1. Click the calendar icon in the **Navigate timeline or select date** field and select the specific date.



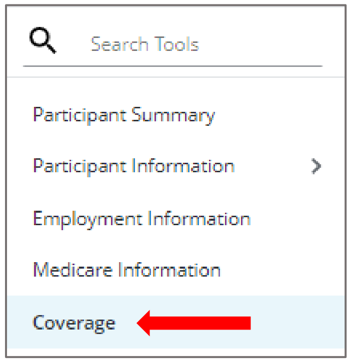
The **Field History** section displays historical data for the selected field in the Employment Details section.

2. Click on the name of any field in the Employment Details section to view its history details below.

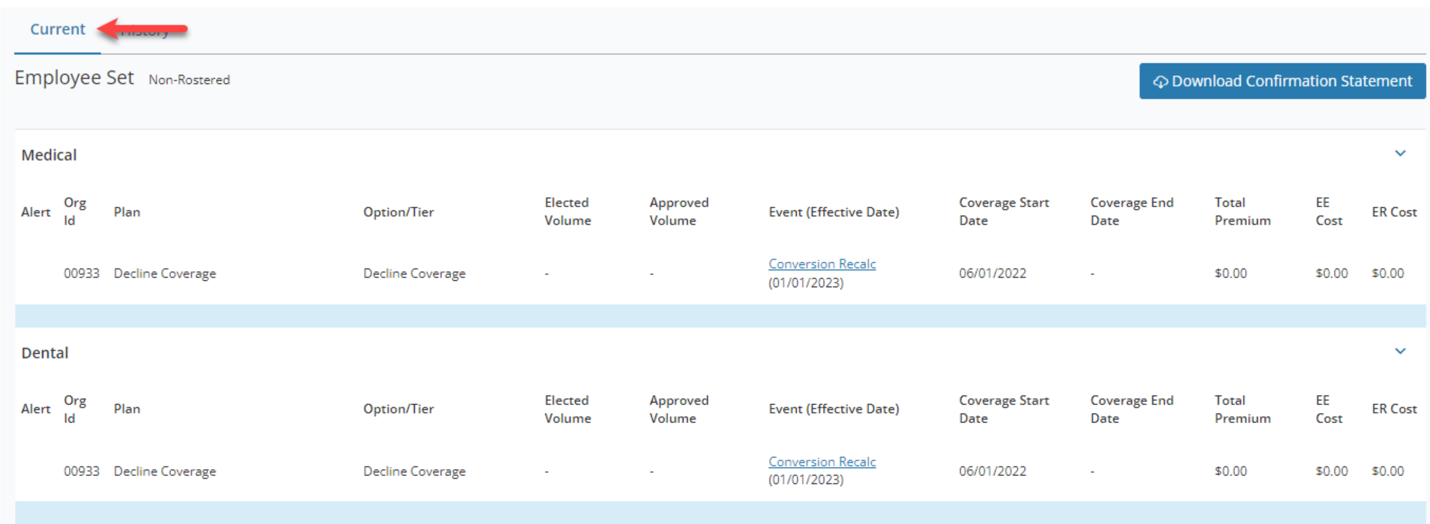
Coverage

The Coverage screen provides the details for a member and their dependents' benefits coverage. It displays the member's current benefits and history of benefits.

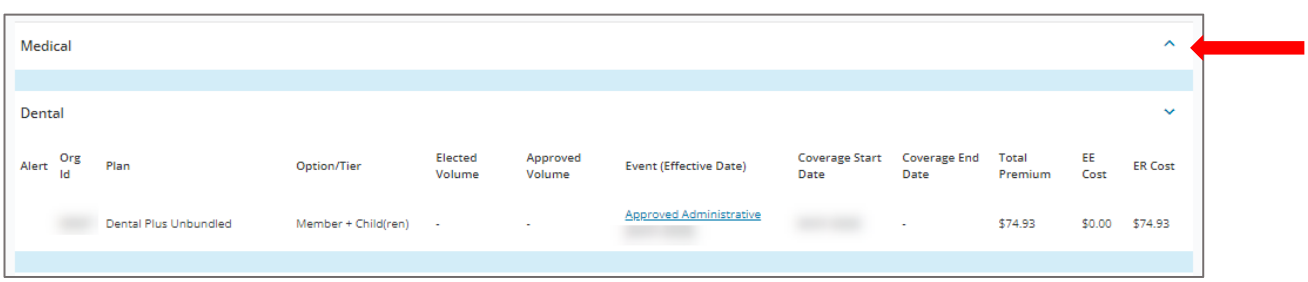
1. Select **Coverage** from the left menu.



The Coverage screen organizes the member's and any dependent's coverage information under **Current** and **History** tabs. If available for the member, Medicare information displays as well.



2. Use the arrows at the far right of each coverage section to collapse or expand the section.



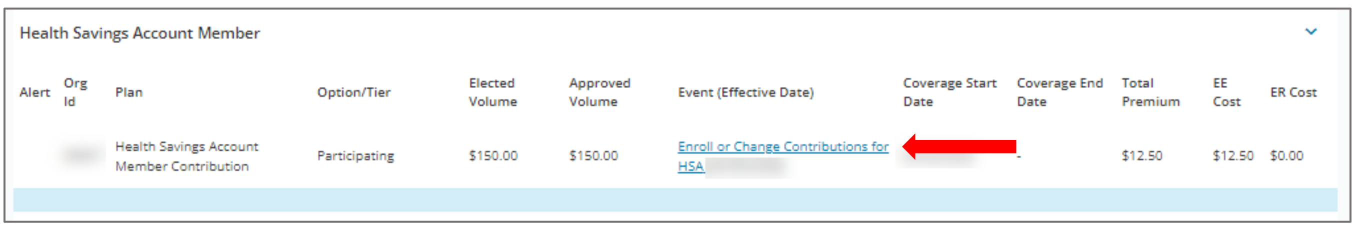
3. Click a downward pointing arrow to collapse a section and click an upward pointing arrow to expand the section.

Coverage – Current Tab

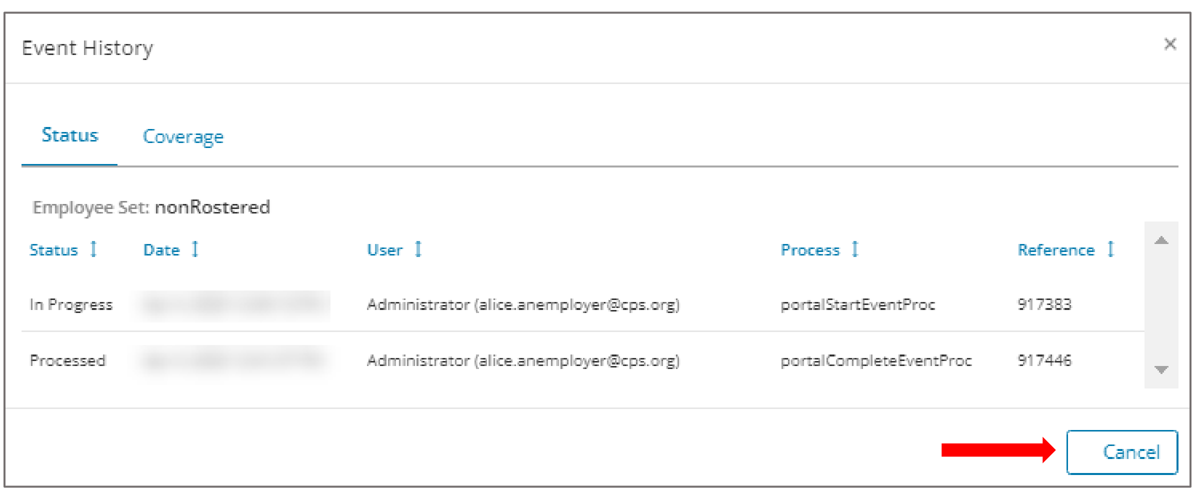
The Coverage screen defaults to the **Current** tab, which shows each benefit offered and the participant's current coverage details, including:

- **Alert** – No data will appear here; this will be populated in future updates
- **Org ID** – Your CPS Employer ID
- **Plan** –Plan Option in which the member is enrolled
- **Option/Tier** – Option for which the member is enrolled; for example: dollar amount, percentage of annual pay, etc.
- **Elected Volume** –Applicable only to life benefits; dollar value the member chose
- **Approved Volume** – Applicable only to life benefits; dollar value the member is approved for. (This will only differ from elected volume if there is a Supplemental Life election pending Evidence of Insurability).
- **Event (Effective Date)** – Displays name of benefit-impacting event and effective date of the change
- **Coverage Start Date** –Date coverage will, or did, begin
- **Coverage End Date** – D coverage ends (if applicable)
- **Total Premium** – total of EE Cost and ER cost per benefit
- **EE Cost** – Employee cost per benefit (displayed only if ministry provided cost share to CPS)
- **ER Cost** – Employer cost per benefit
- **Totals (bottom of table)** – Total premium and costs for all benefits

To view the event history for the events entered for the coverage changes:



1. Click on the event name under **Event (Effective Date)**.
   The Event History window opens, displaying information on the event status and coverage elected through this event.

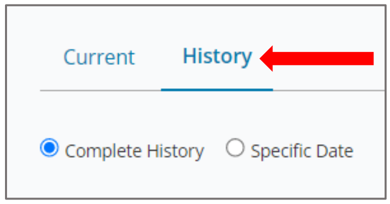


2. Click the **Cancel** button to close the Event History window when finished viewing.

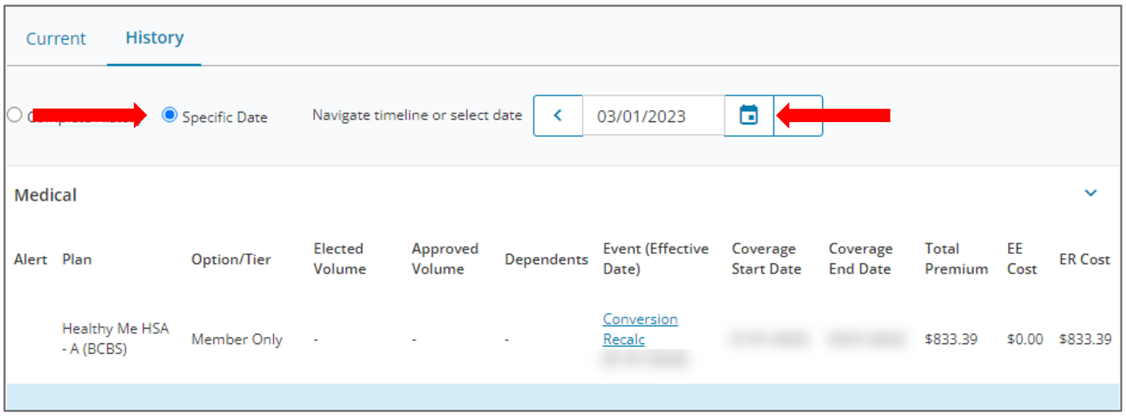
Coverage – History Tab

The History tab shows the member's previous or future coverages. View the Complete History or select a Specific Date to see coverages in effect on that date.

1. Select Complete History to view the member's entire coverage record.



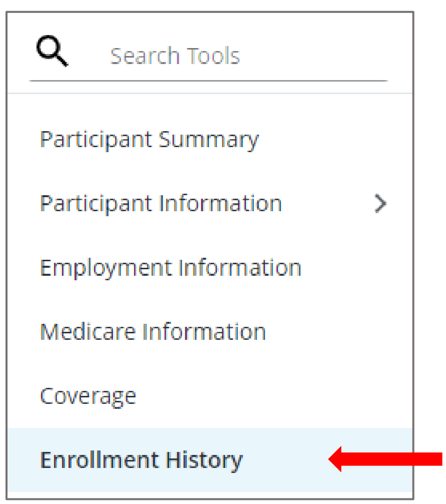
2. Click the **Specific Date** option and enter a date to view coverage as of a specific date.



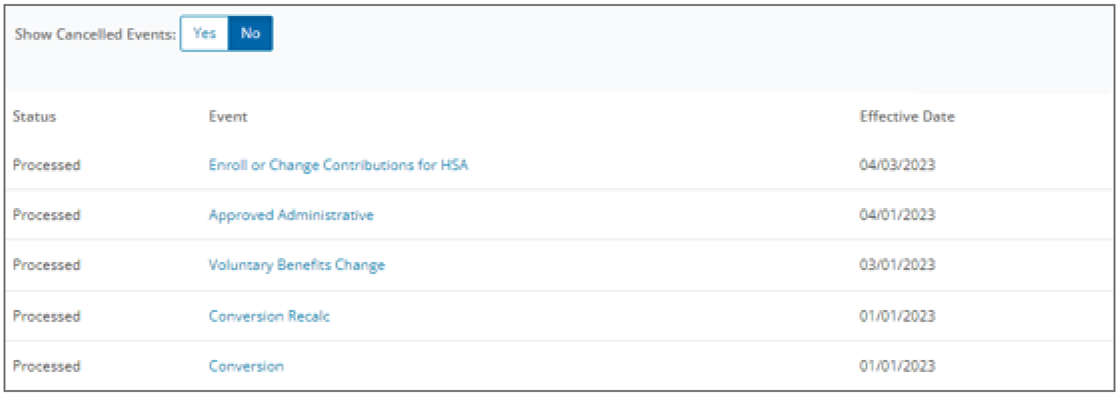
Enrollment History

Enrollment History provides details on the member's events history. Events include life and employment changes, such as marriage, birth of a child or employment termination. Displayed details include event status, name of event, and effective date for the events processed on the member's record.

Begin with a Participant Search.

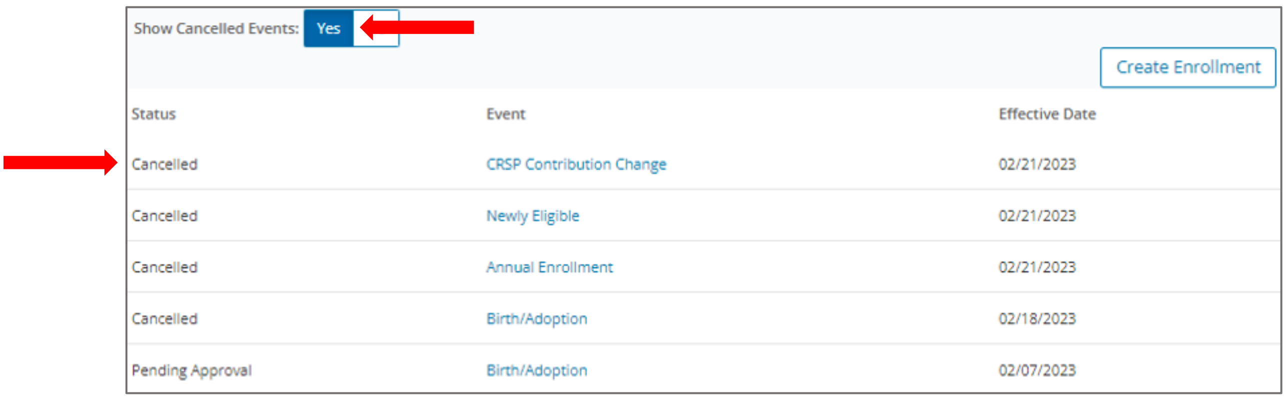


1. Click **Enrollment History** on the member navigation menu to view the member's previous events.

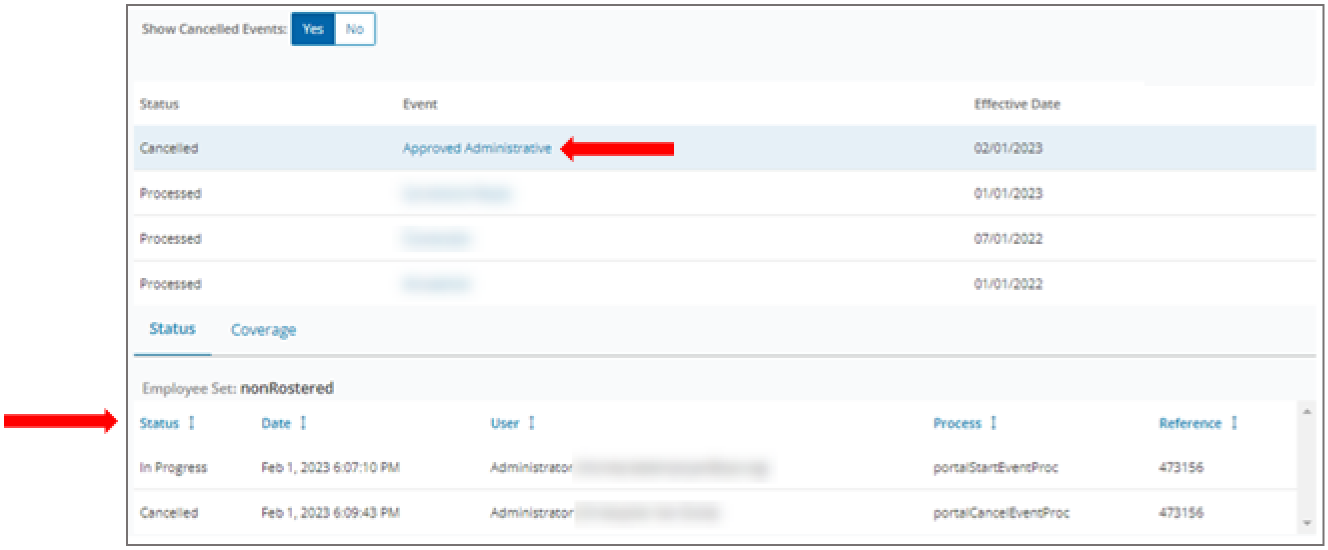


The Show Cancelled Events option defaults to *No*.

2. Click the **Yes** option in the **Show Cancelled Events** field to view any cancelled events.



Select a specific event to view the complete history of that event:



3. Click on the name of one of the listed events.
   The details for the selected event display below, with available tabs to select **Status** or **Coverage**. Status is the default.

The **Status Tab** shows the complete history for the selected event with the following fields:

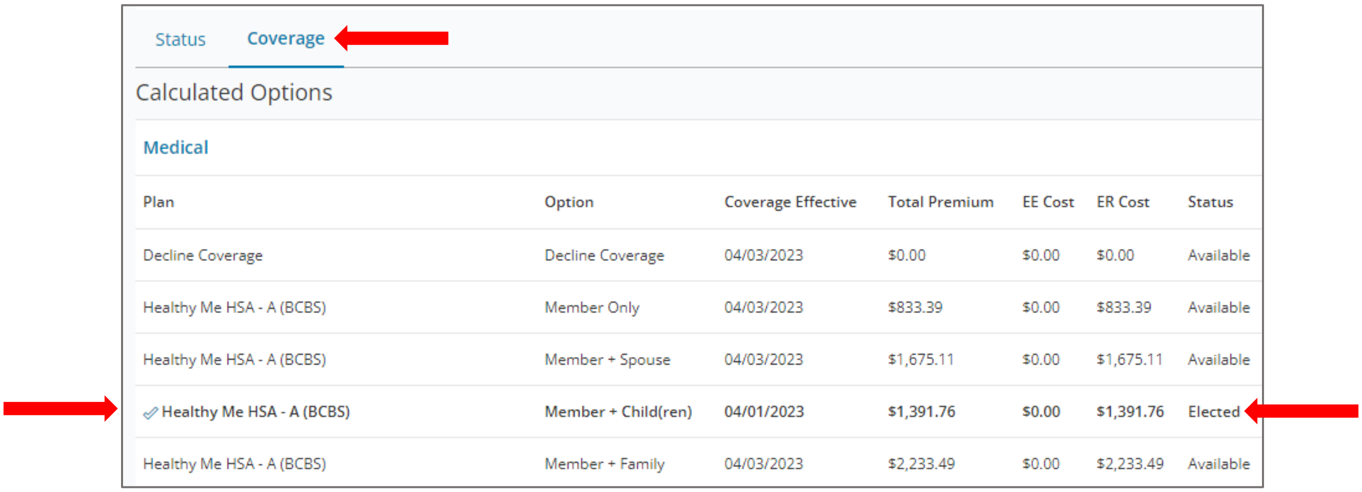
- **Status** – indicates the status of the event during the process from initiating the event to completion
- **Date** – the date the event was entered to apply the change
- **User** – user details for the administrator who processed these events at each stage
- **Process** – the process that was performed for the event such as Start, Complete, Continue, Reverse, Validate, Cancel etc.
- **Reference** – a process reference number for LifeWorks internal and system use

About statuses:

- A member initiates the event with the Create Enrollment function. As this step is finished, the event has an *In Progress* status.
- An event has a *Completed* status when a member has submitted any required documentation for the event.
- An event has a *Processed* status when an administrator makes the final approval.

The **Coverage** tab displays the **Calculated** or **Elected Options** for benefits that were changed for the selected event in the Enrollment History Events (top section). This tab has sections for each benefit and indicates the **Elected** and **Available** statuses for each benefit.

1. Click the **Coverage** tab.
   The Calculated Options table displays below.



Status Coverage

Calculated Options

Medical

Plan	Option	Coverage Effective	Total Premium	EE Cost	ER Cost	Status
Decline Coverage	Decline Coverage	04/03/2023	$0.00	$0.00	$0.00	Available
Healthy Me HSA - A (BCBS)	Member Only	04/03/2023	$833.39	$0.00	$833.39	Available
Healthy Me HSA - A (BCBS)	Member + Spouse	04/03/2023	$1,675.11	$0.00	$1,675.11	Available
Healthy Me HSA - A (BCBS)	Member + Child(ren)	04/01/2023	$1,391.76	$0.00	$1,391.76	Elected
Healthy Me HSA - A (BCBS)	Member + Family	04/03/2023	$2,233.49	$0.00	$2,233.49	Available

Note the **check marks** indicating the **Elected** options.

Calculated options for each benefit:

- **Plan** – indicates the elected and available plan for each benefit
- **Option** – the elected and available option for each benefit
- **Coverage Effective** – the date the coverage is effective for elected and available statuses
- **Total Premium** – total cost of each benefit
- **EE Cost** – EE coverage available under plan, if the employer cost share was provided
- **ER Cost** – ER coverage available under plan
- **Status** – indicates the status of each benefit as Elected or Available
  - Elected – the plan and option have been elected for the participant
  - Available – the plan and option availability for the participant based on other employment status such as Class and Plan Group