



All Your Benefits. One Place.®

TASK MANAGEMENT

Process Document


Utilizing the Task List in eEnroll will allow an Health Benefits Representative (HBR) to manage the pending/outstanding tasks for their employees. This will allow HBRs the opportunity to monitor the types of changes that are being made to their employees profiles, and provide the employee with the knowledge to ensure that these tasks are approved within a timely manner.

Task Management FAQ's

How do I access the Task List?

- The Task List can be accessed 2 way:
 - In HR Role within eEnroll, from the 'To-do List' on the group's home page, pending tasks can be seen by changing the 'View By' drop down to 'All Tasks.'

To-do list

View by: 

- Under 'Data & Reporting' in eEnroll, a Task List report can be found under the 'Popular' tab of 'Standard Reports.'

★ Task List	Provides a list of items which requires attention
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Task Management FAQ's

When should I review the Task List?

- Benefitfocus recommends that this is managed daily. However, the team at the employer unit may determine the best practice that will allow the tasks to be managed in a timely manner.

Task Management FAQ's

What types of tasks show on the Task List?

- Approval, More Data Required, Invalid Data, Benefits Not Started and Dependent Information Tasks are displayed on the task list. (If viewing the Task List from the 'To-do List' as seen below, the tasks will be broken out into the previous benefit year or the current benefit year. Reference slide 7.)

15 Employees Need to be Approved

1 Employee or Dependent with Invalid Data

3 Employees and/or Dependents Require More Data

4 Employees whose enrollment period has passed

1 Employees with 1 to 5 days left to enroll

29 Employees with 6 or more days left to enroll

73 Employees Missing Dependent Verification

2 Employees with Documents Pending Approval

19 Employees with Denied Documents

Task Management FAQ's

What types of tasks show on the Task List? (continued)

- Employees Need to be Approved task means that you have employees that have changes that need to be approved by an HBR. These tasks are the responsibility of the Employing Unit.
- Employee or Dependent with Invalid Data means that the employee's profile contains information that is invalid (Ex. Effective date is before hire date). These tasks are the responsibility of both the Employing Unit and Benefitfocus.
- Employee or Dependent Requires More Data is normally related to an attribute that cannot be calculated. (Ex. 2018 NCFlex Group Term Life (01/01/2018 - 12/31/2018) cannot be calculated). These tasks are typically the responsibility of Benefitfocus.
- Benefits not started tasks are related to employees that are either still in their Initial Eligibility window and have not made benefit elections, or, it could be related to employees that are now outside of their Initial Eligibility window, and they have not accepted or declined benefits.

Things to Remember

- When managing your Task List, keep in mind that it may be necessary to review the Document Center Process Document because both processes tie into one another.
- There may be some tasks present on your task list that you are not able to resolve. Those are the tasks that are worked by your Account Manager.
- If there is a pending task that is outstanding for more than 45 days, an approved exception is required in order for the Account Management team to approve the task. If the task is outside of 45 days and the HBR would like it to be declined, a One Place 365 case should be filed, or the HBR can call the HBR Support Line for assistance.
- The Task List Report has filtering options that you can utilize to capture specific tasks.
- The Task List Report also has scheduling options that will allow you to have the report automatically ran on the date that the HBR desires.

Dependent and QLE Documentation

- Dependent Verification documentation and Qualifying Life Event documentation should be tied into your normal Task List monitoring
- If a member adds a dependent to their coverage, only the Task requesting dependent documentation will populate in eEnroll. However it is required that the employee upload the QLE documentation in eEnroll along with the Dependent documentation.
- It is best practice that all employees are uploading their documentation in eEnroll to support enrollment changes
- It is expected that the employee provides documentation to the correct HBR team member within 30 days of the change being keyed
- If a member does not upload documentation within 30 days, it is the Employing Unit's decision on their process:
 - Deny the pending task before outside the 45 days –*This may result in needing to submit an exception at a later date if the employee ends up submitting the proper documentations*
 - Allow the member's task to pend until after the 45 days; submitting an exception requesting the task to be approved

To-Do List / Task List

- As an HBR, you can review the Task List from the home page in eEnroll.

The screenshot displays a 'To-do list' interface with the following sections:

- To-do list**
 - View by:** All Tasks (dropdown menu)
- Previous Benefits**
 - [View by offer >](#)
 - 3 Employees Need to be Approved (with 'Approve All' button)
 - 1 Employee or Dependent Requires More Data
- Current Benefits**
 - [View by offer >](#)
 - 14 Employees Need to be Approved (with 'Approve All' button)
 - 1 Employee or Dependent with Invalid Data
 - 3 Employees and/or Dependents Require More Data
- Benefits not started**
 - Enrollment period:** 2 selected (dropdown)
 - Benefit offer:** 21 selected (dropdown)
 - Go** (button)
 - 4 Employees whose enrollment period has passed (with 'Refuse All' button)
 - 31 Employees with 6 or more days left to enroll (with 'Refuse All' button)

To-Do List / Task List

- You can view the tasks by offer.
- By clicking on the text next to the number of tasks, you will see the names of the employees that currently have that specific task pending. Clicking on one of employee's will take you to that employee's profile.
- You are able to move from one employee to the next (the employees that have that specific pending task) by utilizing the arrows at the top left of the screen.

To-do list

View by: All Tasks

Previous Benefits

View by offer >

2	Employees Need to be Approved
1	Employee or Dependent Requires More Data

To-do list

< Back

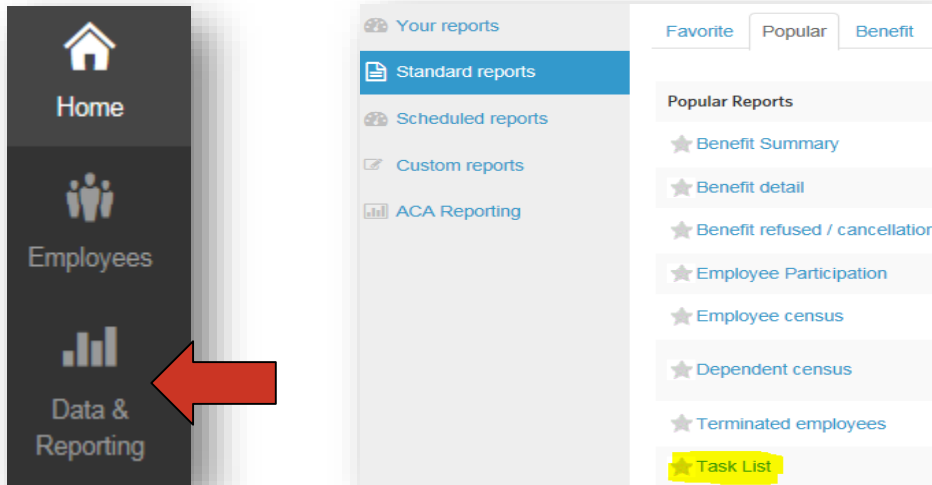
2017 SHP Medical

2 Employees Need to be Approved

< Back to employees < 1 of 3 >

Task List Report

- To access the Task List Report, please see the steps below.
 - From the home page in eEnroll, click on Data & Reporting to the left of the screen.
 - Click on Standard Reports to the left, and under the Popular tab, select 'Task List.'
 - Select your formatting and filtering preferences. Click 'Next' at the bottom of the page. (Note that you can schedule this report to automatically run and be presented in your scheduled reports.)



Task List Report

- To access the Task List Report, please see the steps below. (continued)
 - Select your formatting and filtering preferences. Click 'Next' at the bottom of the page. (Note that you can schedule this report to automatically run and be presented in your scheduled reports.)

Task List Report

Formatting Options

Report Format

To include additional report options, change the Report Format to CSV.

Include filter criteria in results

Additional Details

Group by

Sort by

Mask SSN in Report Results

Filtering Options

Task List Section*

12 month RIF enrollee*

Empl Class*

FTE*

LTD*

NCFLEX Eligible*

SHP Eligible*

Transfer*

Assigned Carrier Rep


Scheduling Options


Create Schedule for Report

Scheduling Options

Create Schedule for Report

Schedule Name

Schedule Start Date 

Schedule End Date 

Schedule Frequency

Task List Report

- To access the Task List Report, please see the steps below. (continued)
 - The filtering options provided on slide 10 are automatic defaults. Below are the task types that the HBR typically manages on their Task List Report.

Task List Section* 5 selected

Search

Select all

- Sections to be Approved
- Sections to be Completed (Benefits Not Started)
- Sections to be Completed (Invalid Data)
- Sections to be Completed (Provide More Data)
- COBRA Needs to be Canceled
- Incomplete Health Statements
- Complete Election Approvals (Health Statement Required)
- Sections Pending Carrier Approval
- Sections with Carrier Changes Need to be Reviewed
- Sections Need to be Reviewed by Employee
- Missing Dependent Verification

Scheduling Options

Create Schedule for R

Cancel Create Report