SHBP
State Health Benefit Plan
A Division of the Georgia Department of Community Health

SHBP Enrollment Portal

Admin Experience (Agencies Sending Automated Files) Job Aid

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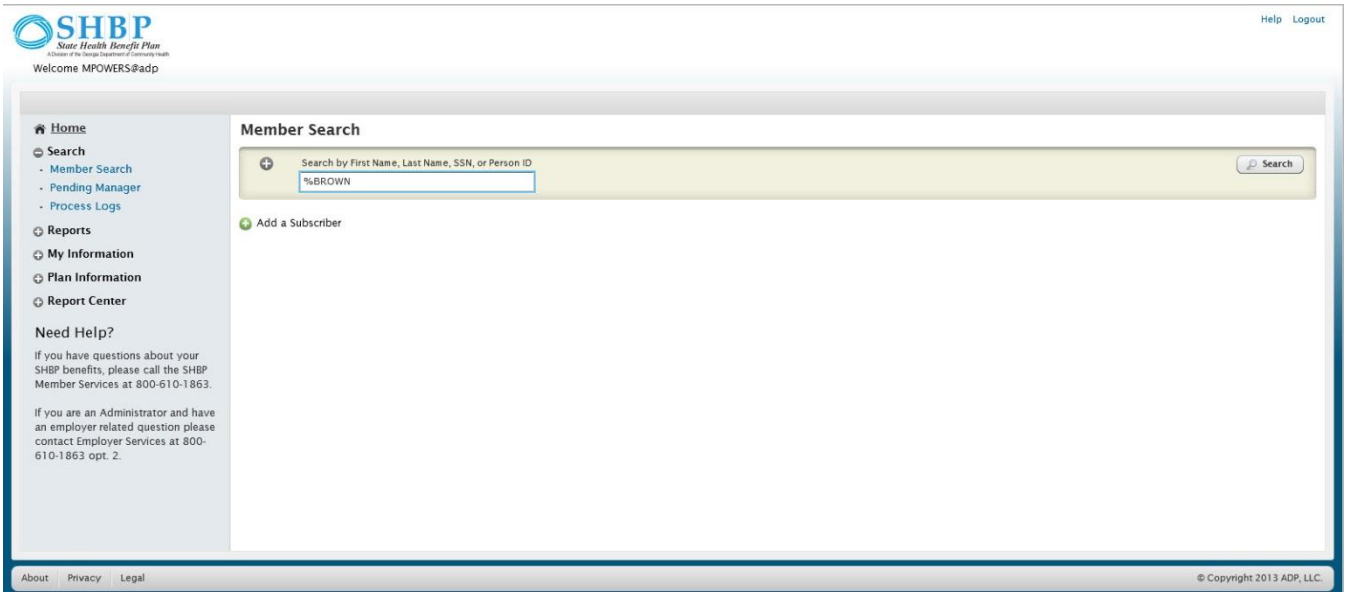
MEMBER SEARCH

Member Search provides a brief overview on the function and types of searches that can be done in the system.

Note: Admins will only have access to the member population their security access has been set to view.

1. Log on to the SHBP Enrollment Portal at https://mySHBPga.adp.com

2. Click "+" next to the Search button to expand. Choose Member Search. There are two types of search available:
   - Basic Search accepts a full or partial last name (using % as a multi-character wild card, as needed) or a complete Social Security Number (SSN).
   - Advance Search accepts full or partial first or last names as well as a complete SSN.



3. Enter member criteria to search. The search results will display.

   Click the green arrow, and several options will display. Note: User Roles feature will not be seen by all Admins.

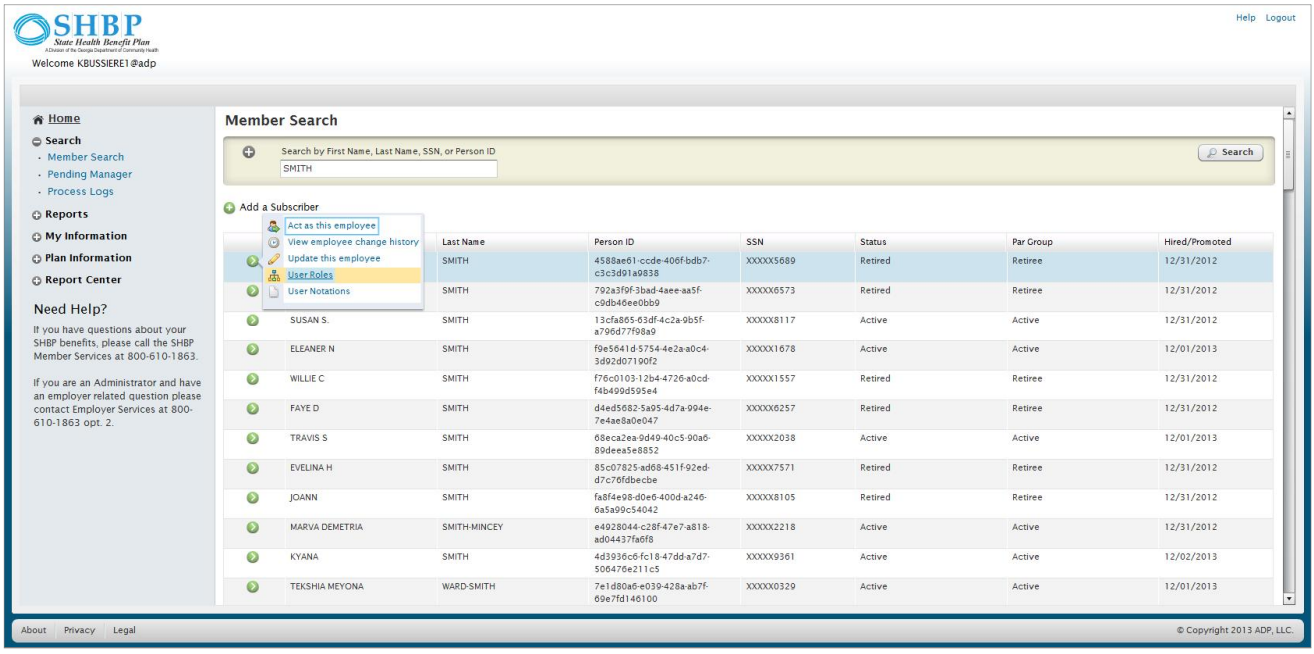
   Act as this employee returns you to the Welcome page with the notice that you are "Acting as <member name>". This enables you to:
   - Make elections on behalf of the member
   - Declare Life Events
   - Review Current Enrollment and Employee Profile screens.

   View employee change history Navigates to the Employee Profile page, from which you can also view the Summary and Timeline pages for this member.

   Update this employee Navigates to the Data Sharing Tool which allows updates to add or edit member indicative data.

   User Roles Allows security access to be defined for Admins. Only certain SHBP Admins will have this access, although this may be a feature rolled out in the future to additional groups.

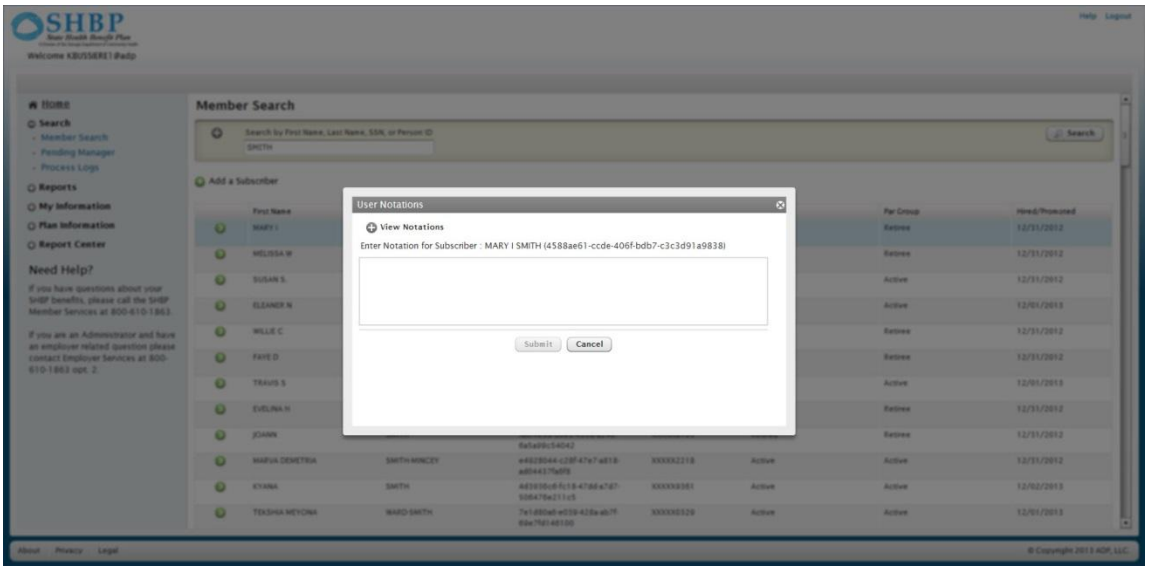
   User Notations Allows an Admin to enter notes on a member's record.



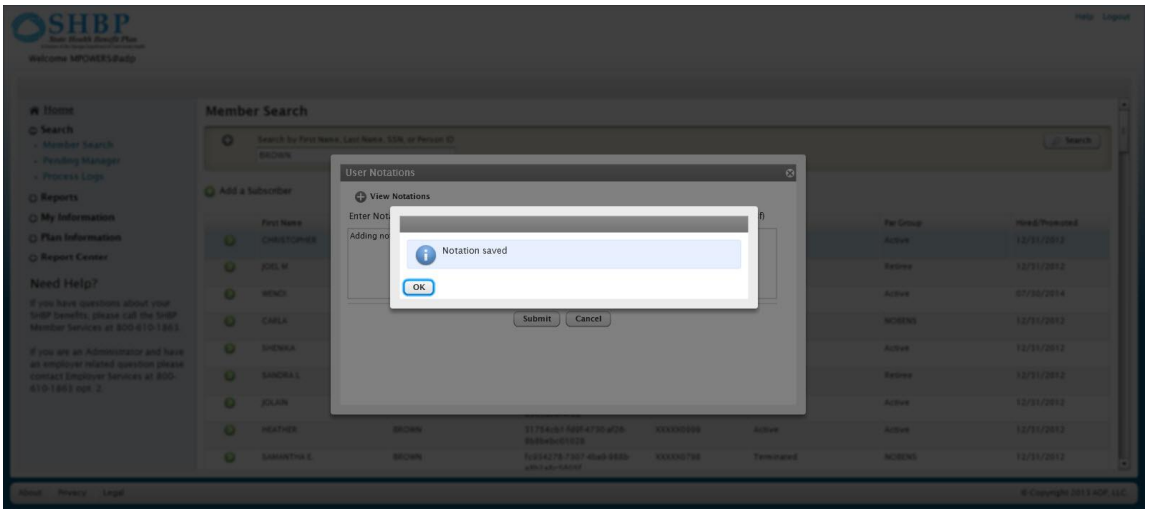
User Notations

The User Notations feature allows an Administrator to enter notes on a member's record.

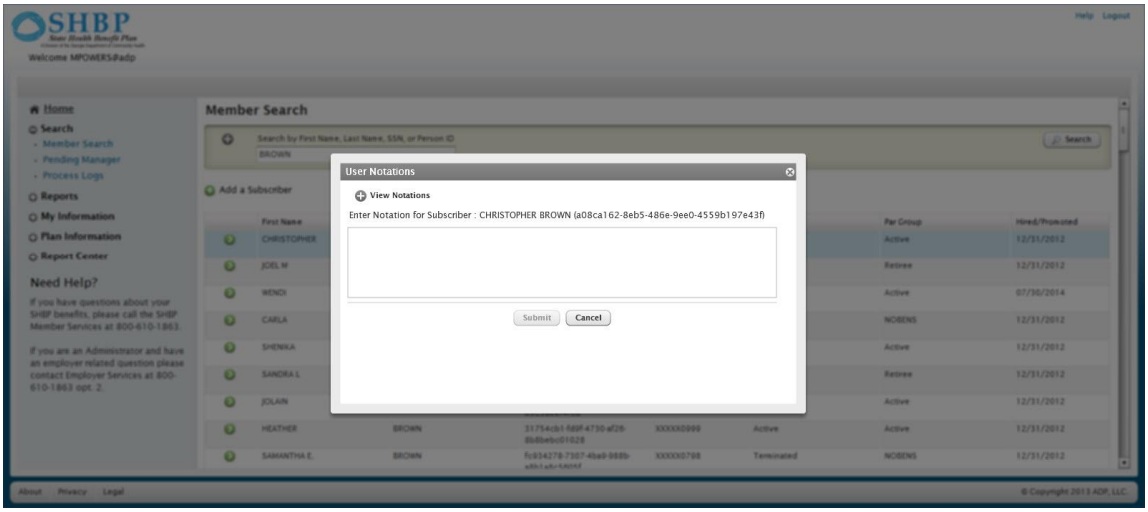
1. Log on to the SHBP Enrollment Portal. Click "+" next to Search. Choose Member Search. Use either one of two search types: basic or advanced. Enter member criteria. Click search. Search results will display. Click green arrow next User Notations. Choose User Notations, and enter the notes desired for the member. Click Submit to save comments to the system.



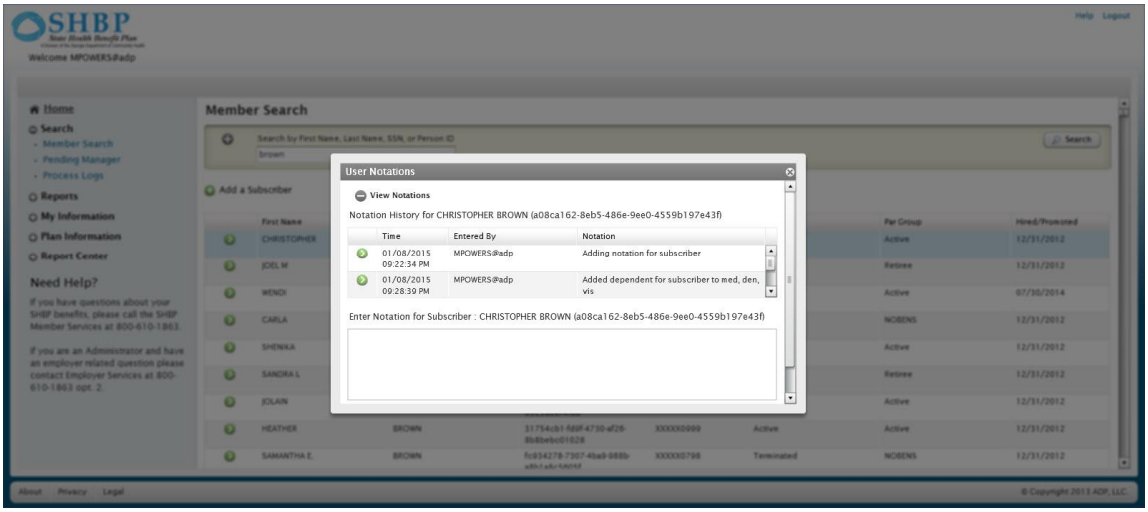
2. Confirmation of saved notation will appear.



3. To view historical notes in the system, click View Notations, and expand the icon.



4. Previous notes will display.



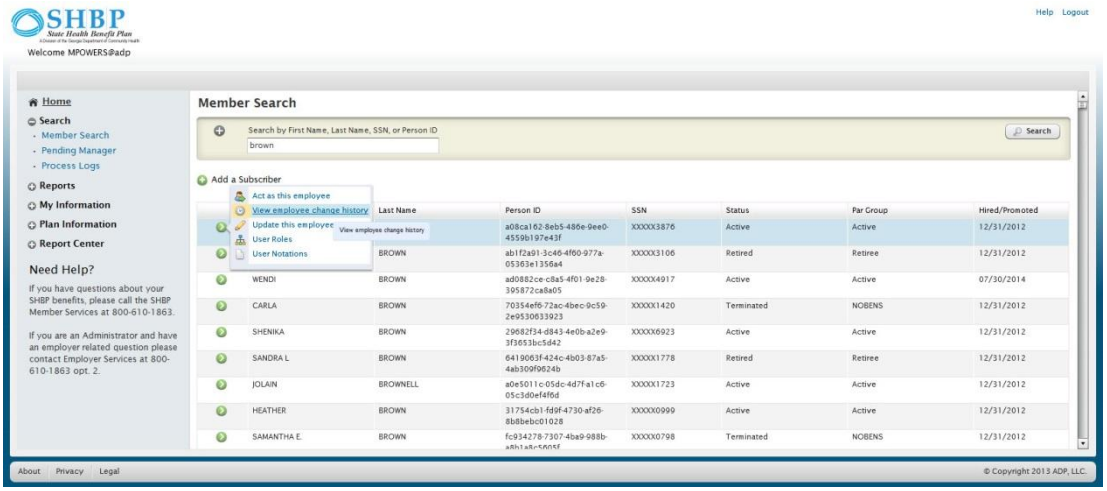
VIEW EMPLOYEE CHANGE HISTORY > AUDIT FEATURE

The Audit Feature navigates to the Employee Profile page, from which Administrators only also view the Summary and Timeline pages when acting as a member.
Critical: Only Admins can use Audit capabilities.

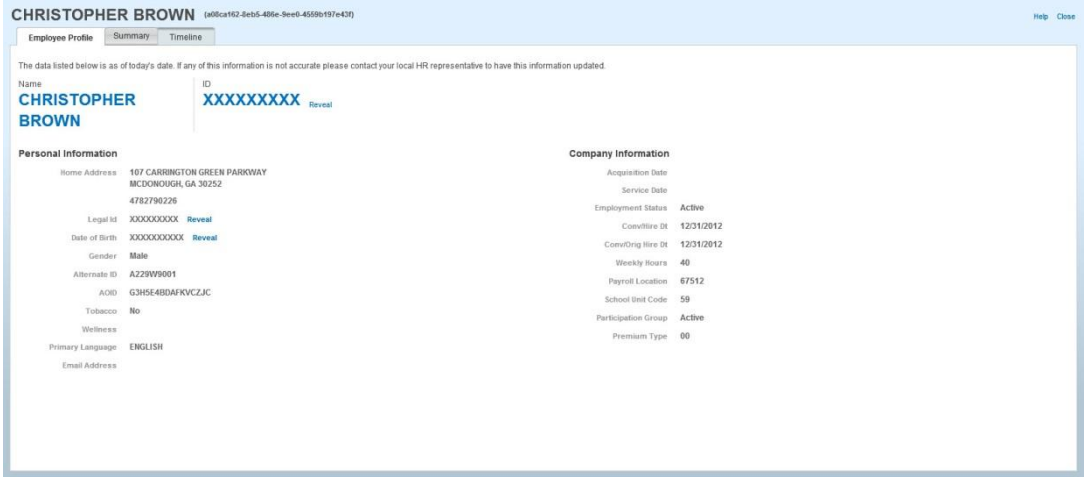
1. Log on to the SHBP Enrollment Portal. Click "+" next to Search. Choose Member Search. Use either one of two search types: basic or advanced. Enter member criteria. Click Search. Search results will display. Click the green arrow.

   - Choose Option 1 to View employee change history. Click the clock icon, or
   - Choose Option 2 to View employee change history/Audit

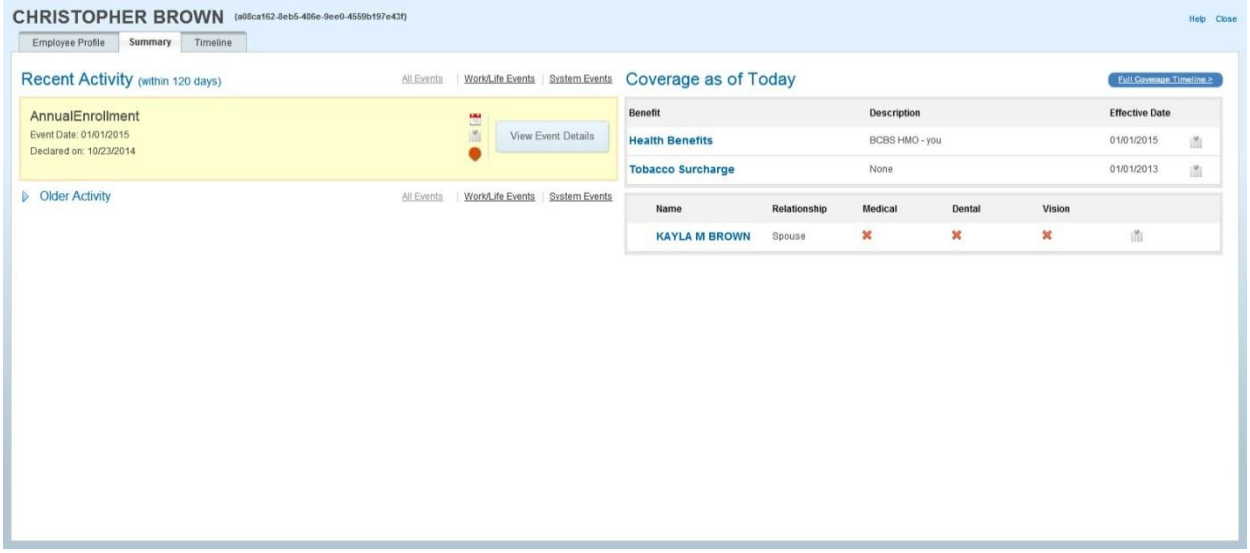
   On left hand side of the screen, choose Audit Employee.



2. Regardless of what option is chosen, the first page that displays is Employee Profile. Note: The Employee Profile is also available to the member from the right-hand navigation bar.



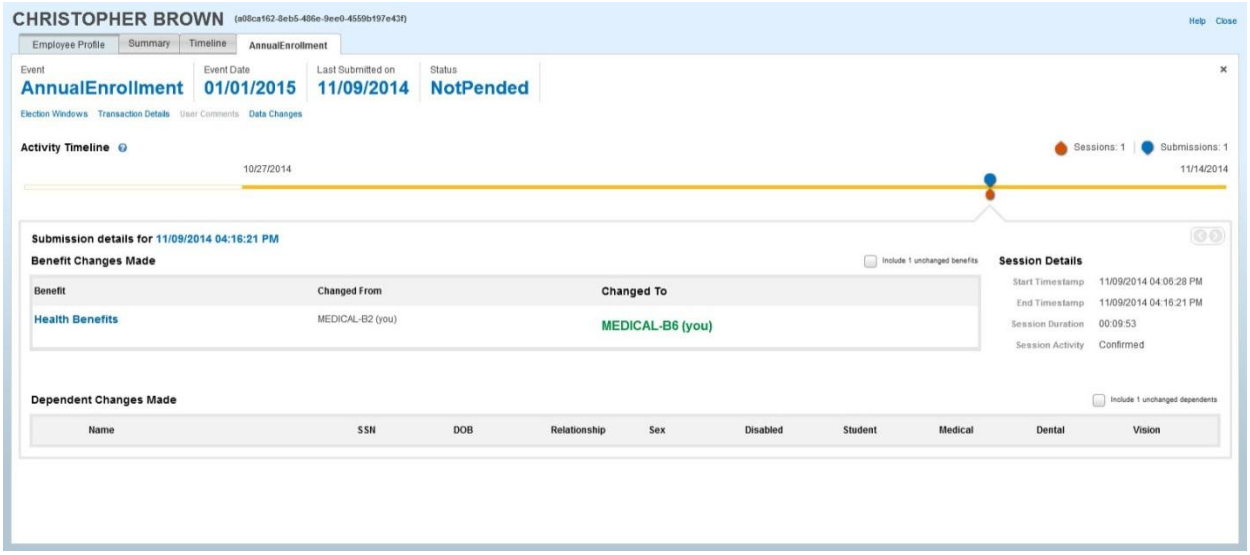
3. Click the Summary tab. The Summary tab lists recent activity on the left and current benefits and effective dates for the selected member and dependents on the right. Click View Event Details.



4. The View Event Details page opens a new page, and drills down to information about the benefit elections related to the event. (e.g., what the member changed *from* and then changed *to*). This page shows all user activity (changes) related to the selected event, even if the user did not complete a benefit election. The colored icons represent the following:

   Red icon — Refers to the number of sessions recorded in the web application, whether or not the election was submitted.

   Blue icon — Refers to activity recorded and then election submitted. This page also includes Data Changes, which shows what benefits were changed by this event, with the change indicated in Before and After columns.

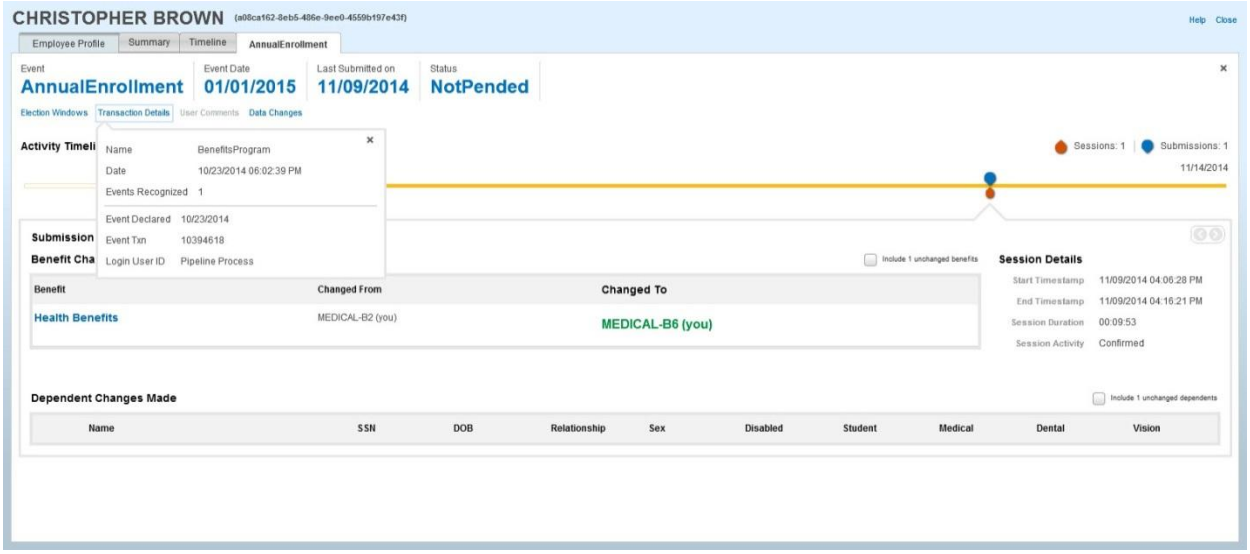


5. Transaction Details shows what caused the change, such as an event or a file load.

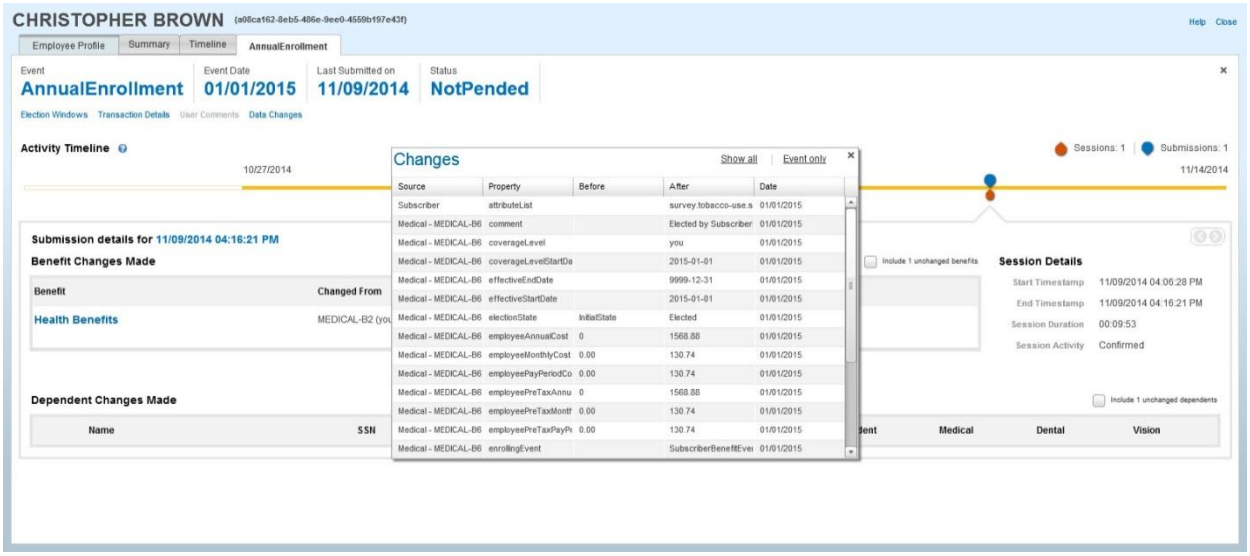
   Session Details shows the amount of time a member is online.

   Activity reflects Confirmed or Unconfirmed. Confirmed means the member (or someone acting on their behalf) saved their elections.

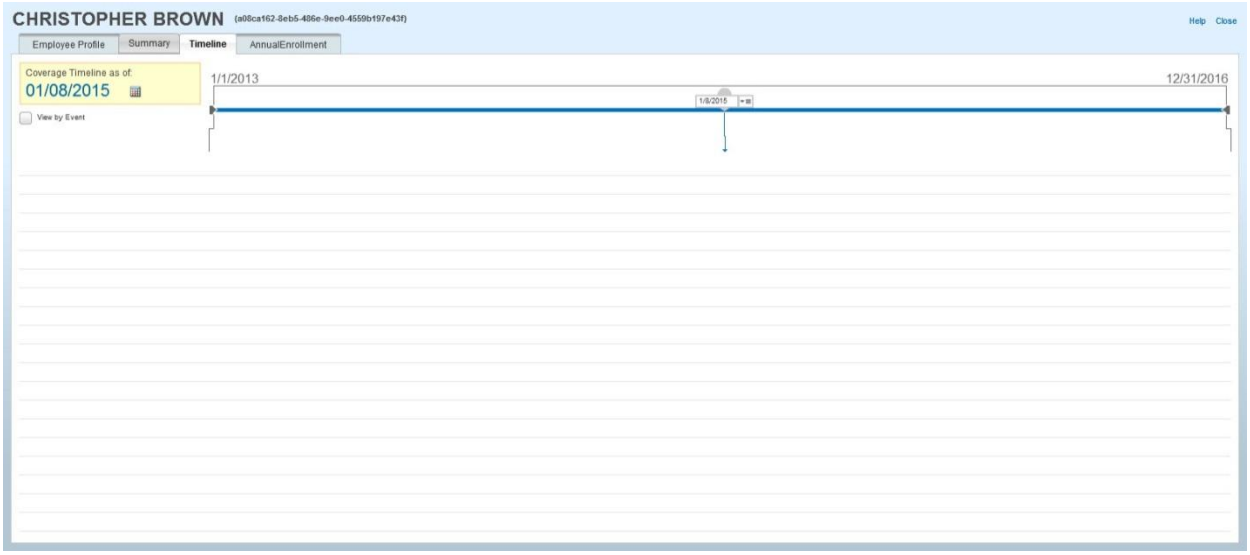
   Data Changes shows what benefits were changed by this event, with the change indicated in Before and After Columns.



6. Click Data Changes. This will enable an Admin to review quickly the before and after of the specific event saved.



7. The Timeline tab shows coverages as yellow bars, with the overall time determined by how the blue timeline is set at the top. The yellow bars are divided into sections if coverages changed. Clicking a section of yellow line displays the coverage details for the period of time defined by the narrow white lines dividing the yellow bar. The coverages displayed depend on what was checked to the right of Coverage Timeline as of <date> in the Summary tab.



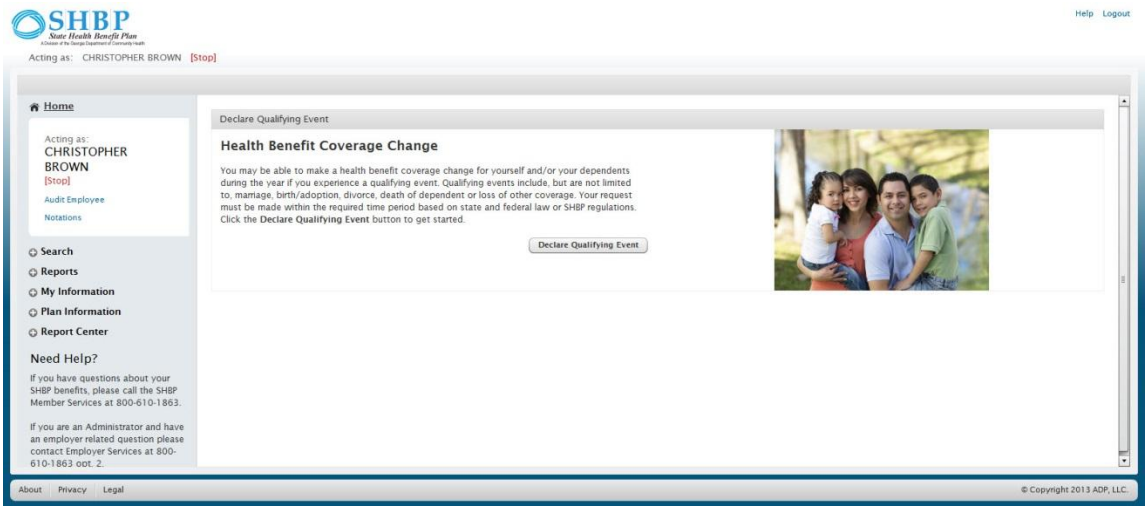
ADMIN EVENT

While acting as an employee, the HR Admin has access to change enrollment elections (dependent information, Health enrollment).

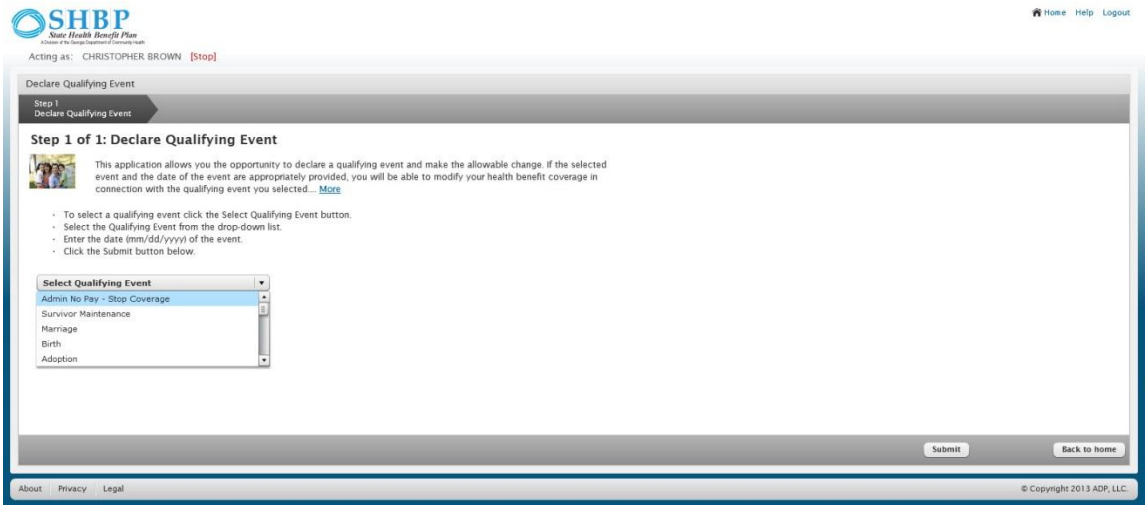
Important: The Admin Event should be used with caution. Coverage will become effective as the date entered in the event.

1. Log on to the SHBP Enrollment Portal. Click "+" next to Search. Choose Member Search. Use either one of two search types: basic or advanced. Enter member criteria. Click search. Search results will display. Click the green arrow, and several options will display. Choose Act as this employee.

2. Confirm that you are 'acting' as the correct member by confirming the member's information is displayed on left-hand side of your screen. Click Declare Qualifying Event located in the center of the screen.



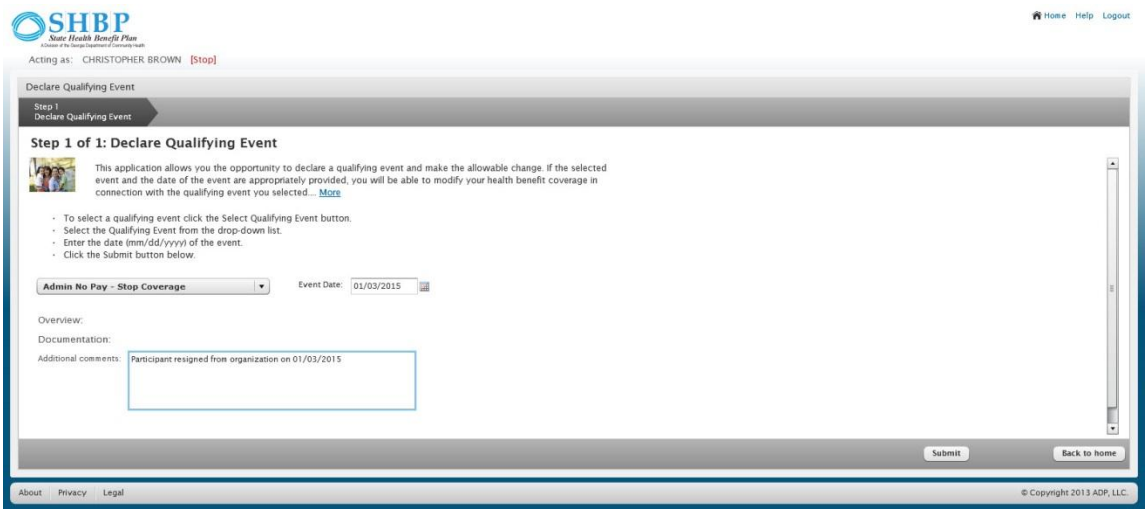
3. At Step 1 of 1: Declare Qualifying Event, click Select Qualifying Event. Choose Admin Event from the drop down box.



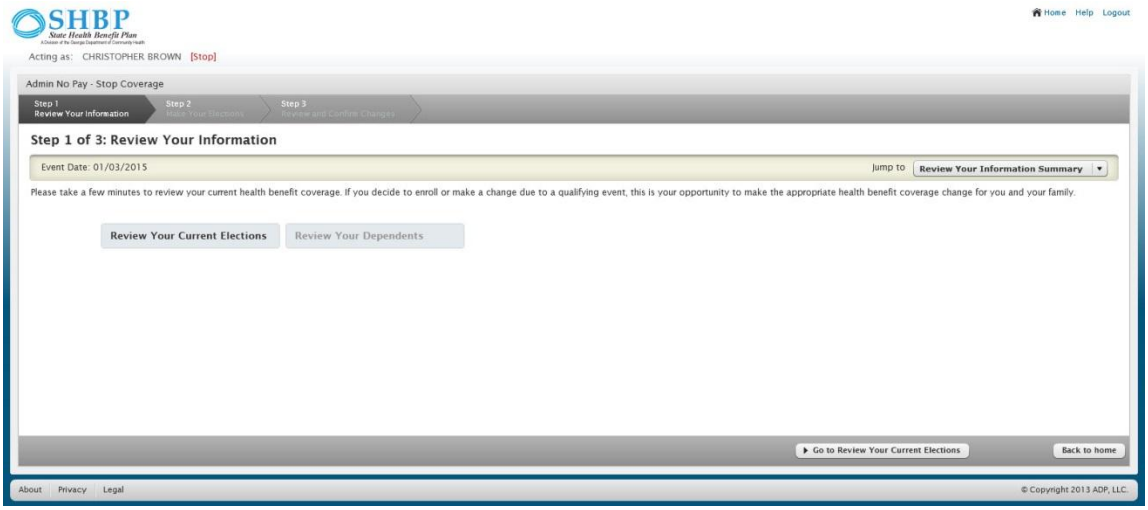
4. Enter in the Event Date.

   Notes:
   - The Event Date cannot be prior to 1/1/2013.
   - Best practice is to enter a comment in the additional comment field for historical reference purposes.

   Click Submit.



5. Complete the enrollment as normal.

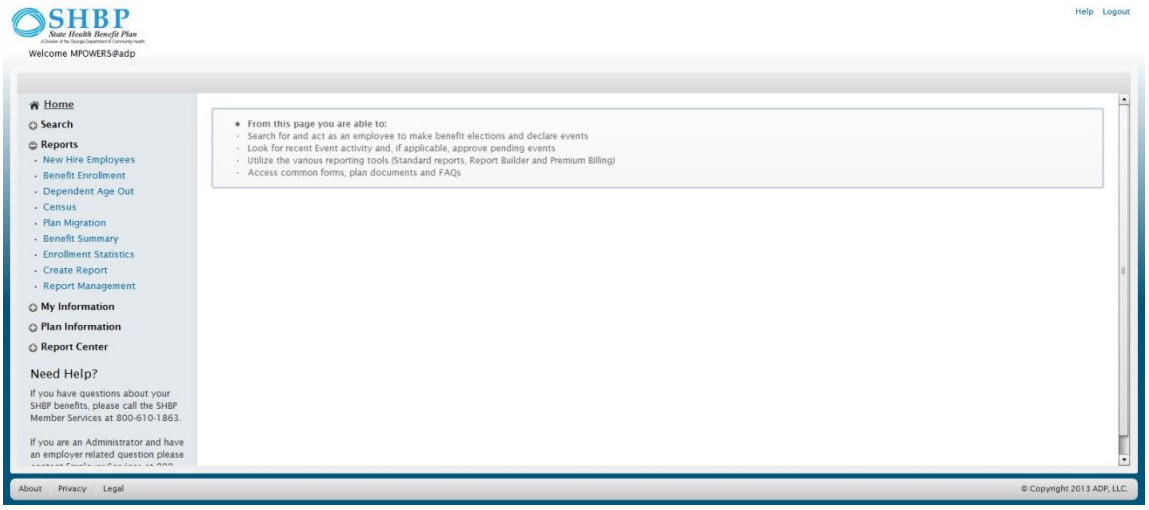


ADP email communication
No ADP email communication

REPORTS

An Admin user with the appropriate security access will be able to run reports and view completed reports that they generated; the user cannot see reports generated by other users.

1. Log on to the SHBP Enrollment Portal. On the Home page, click "+" next to Reports. Access the report needed.



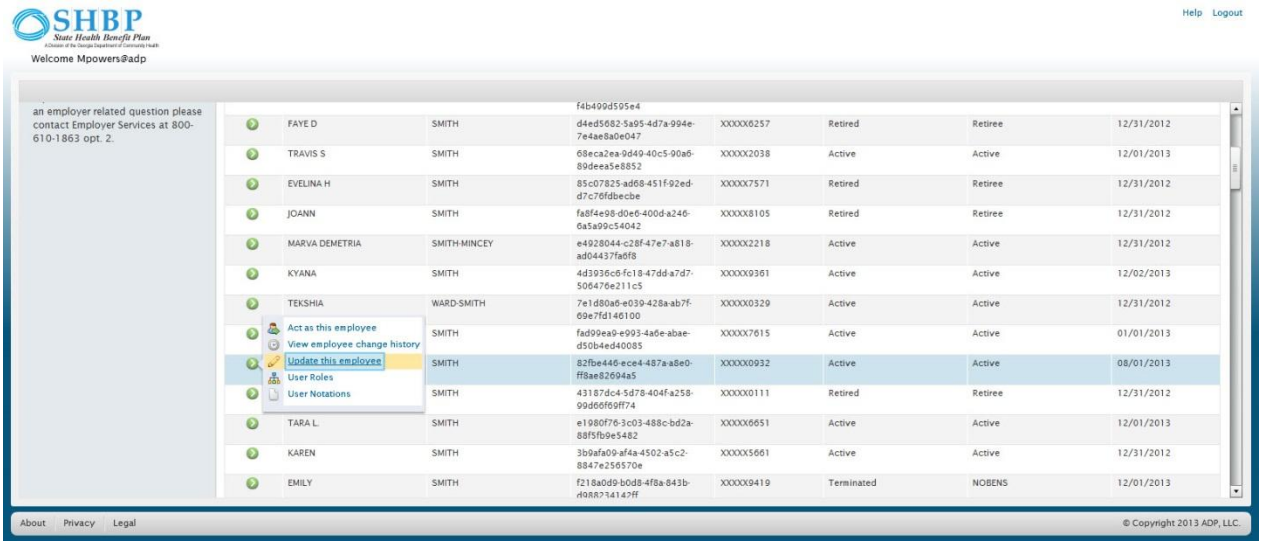
EMPLOYEE INDICATIVE DATA CHANGES: ACTIVE AND RETIRED EMPLOYEE

For Agencies with access to Data Sharing Tool

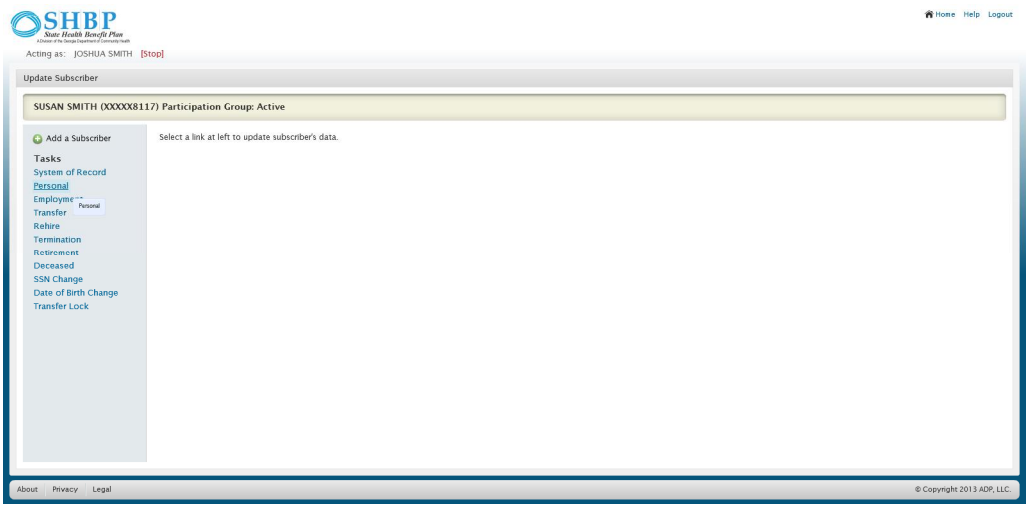
This allows user with appropriate security level access to update indicative data (i.e. spelling of name, birth date, address, SSN changes) for an active or retired member. There may be Admins who can READ the Data Sharing Tool, but will not have WRITE or access to update member data.

Note: Retirees are able to update their address on their OWN after logging onto the ADP System.

1. Log on to the SHBP Enrollment Portal. Click "+" next to Search. Choose Member Search. Use either one of two search types: basic or advanced. Enter member criteria. Click Search. Search results will display. Click the green arrow, and several options will display. Choose Update this employee.

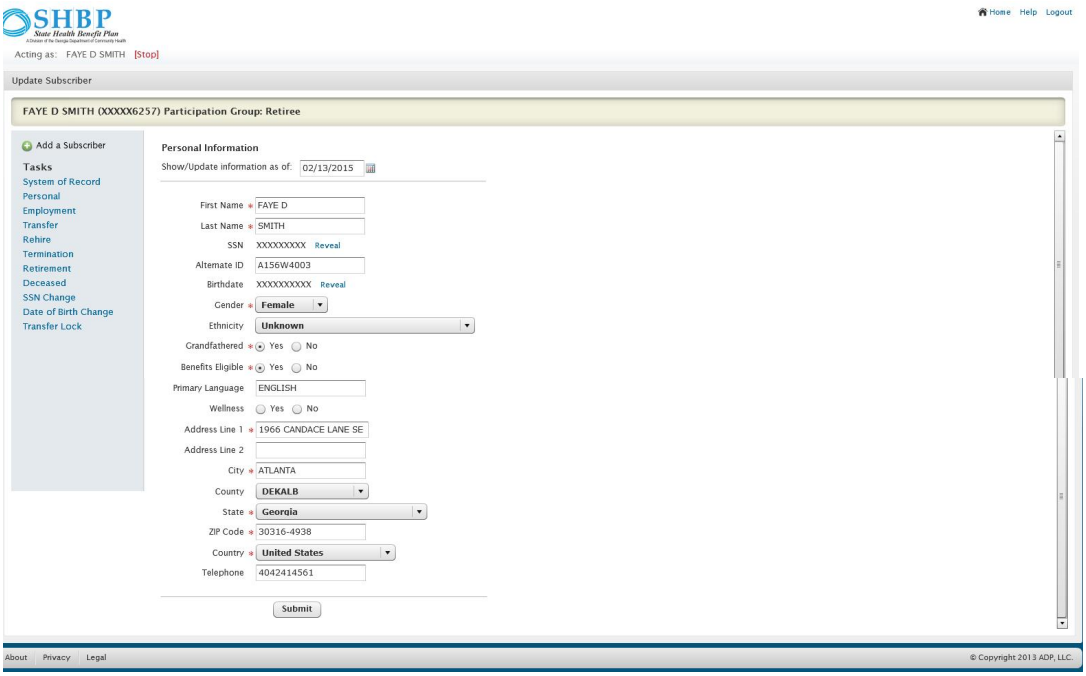


2. On the Update Subscriber screen, choose Personal.



3. Enter the effective date into system using the calendar feature icon. Note: The date cannot be prior to 1/1/13.

   Click Submit to have changes sent to the SHBP Enrollment Portal. Note: Review all changes prior to submission in order to ensure the accuracy of data entry.



ADP email communication
No ADP email communication

Employee Indicative Data Changes: Active and Retired Employees > For Agencies Using Automated Files

Allows users with appropriate security level access to update indicative data (i.e. spelling of name, birth date, address, Social Security Number (SSN) changes) for an active or retired member. (CRITICAL: Only SHBP Admin User or SHBP IT User)

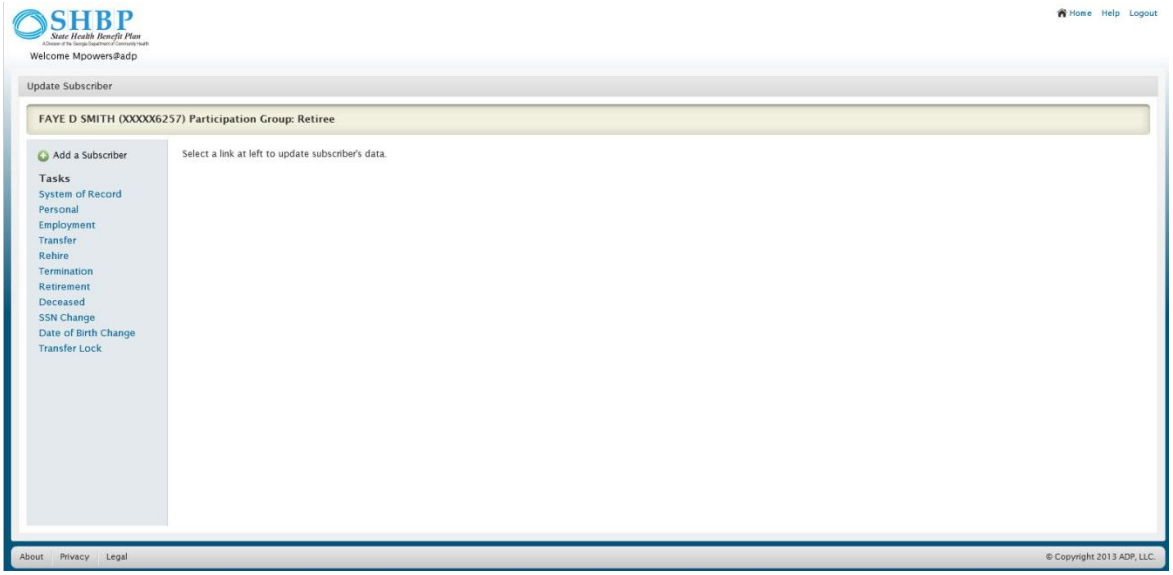
Note:

- *Agencies who send automated files should continue to make changes via automated files that they do today.*
- *There may be Admins who can READ the Data Sharing Tool, but cannot WRITE or access to update member data.*
- *Retirees are able to update their address on their OWN after logging onto the ADP System.*

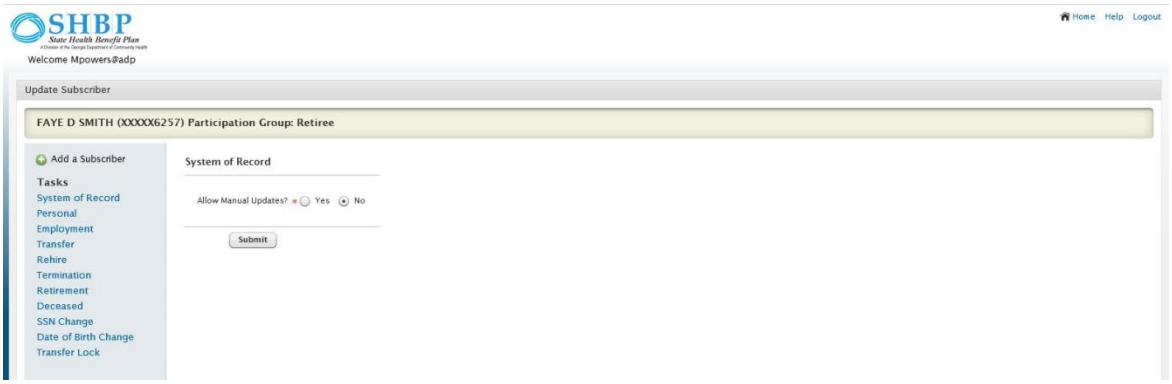
Refer agency to follow the normal file process to update member indicative data. If Data Sharing Tool is the chosen method to update a member's record:

1. Log on to the SHBP Enrollment Portal. Click "+" next to Search. Choose Member Search. Use either one of two search types: basic or advanced. Enter member criteria. Click Search. Search results will display. Click the green arrow, and several options will display. Choose Update this Employee.

   On the left-hand navigation bar, choose System of Record.



2. Since the Data Sharing Tool is not the system of record, click Yes. This will enable the record to be updated via the Data Sharing Tool. Choose Submit.

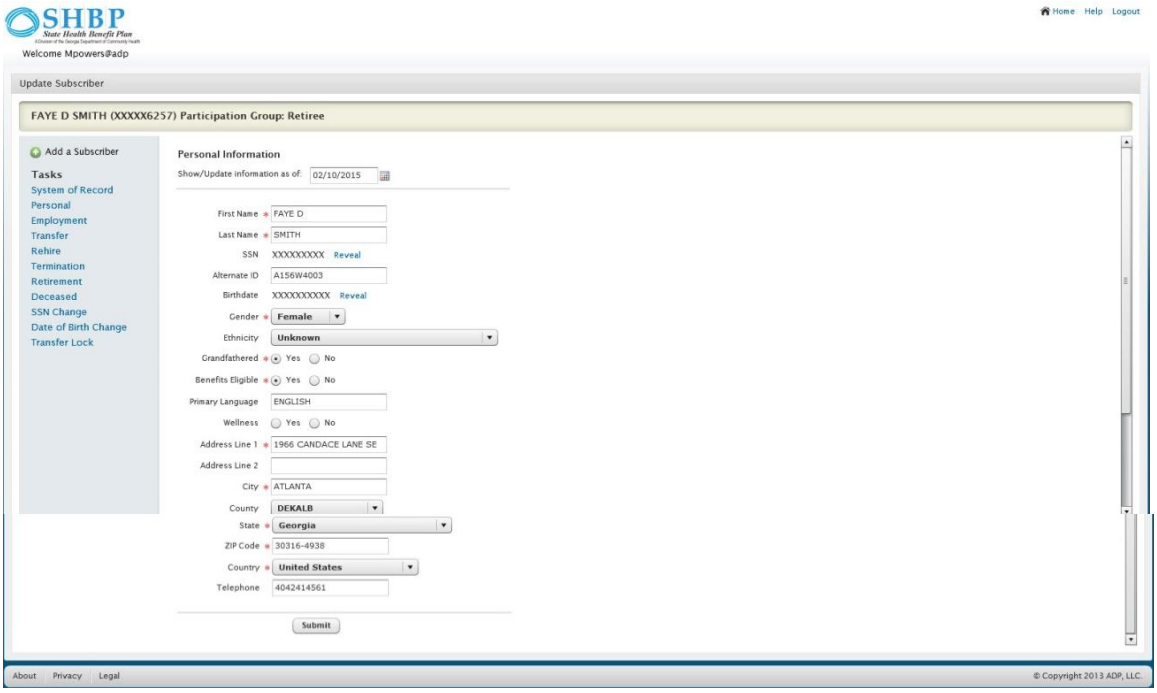


3. On the Update Subscriber screen, choose Personal.

4. Enter in appropriate effective date into system using the calendar feature icon. Note: The date cannot be prior to 1/1/13.

   The HR Admin making the update must inform the local Agency to update their normal system of records. CRITICAL: If this is not updated, the data changes will be undone.

   Go back to the System of Record and choose No to relock the record. Choose Submit. This will set the System of Record back to be 'not manual'.



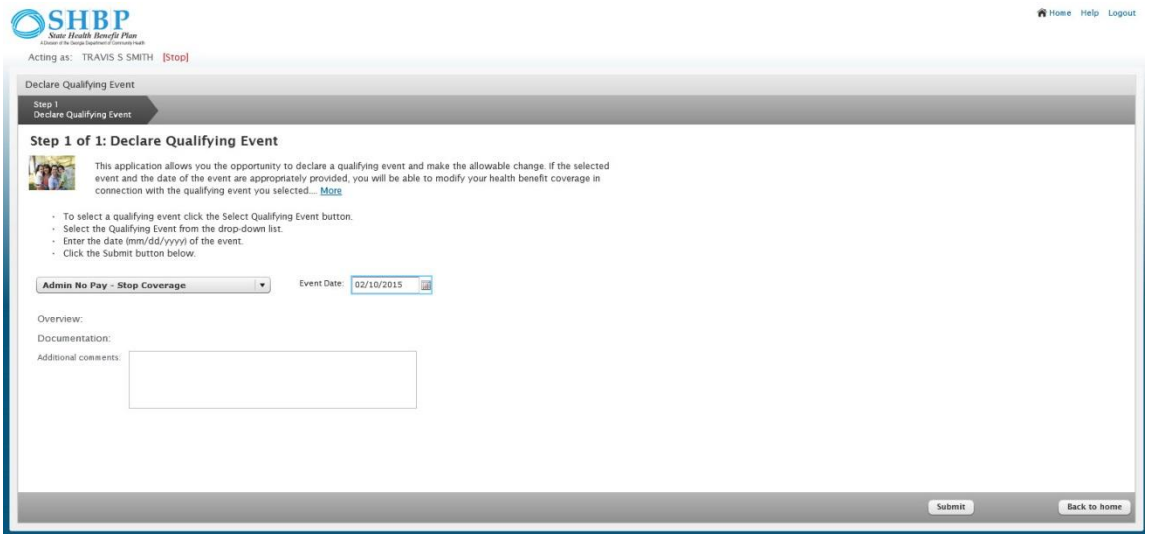
ADP email communication
No ADP email communication

DEPENDENT INDICATIVE DATA CHANGE

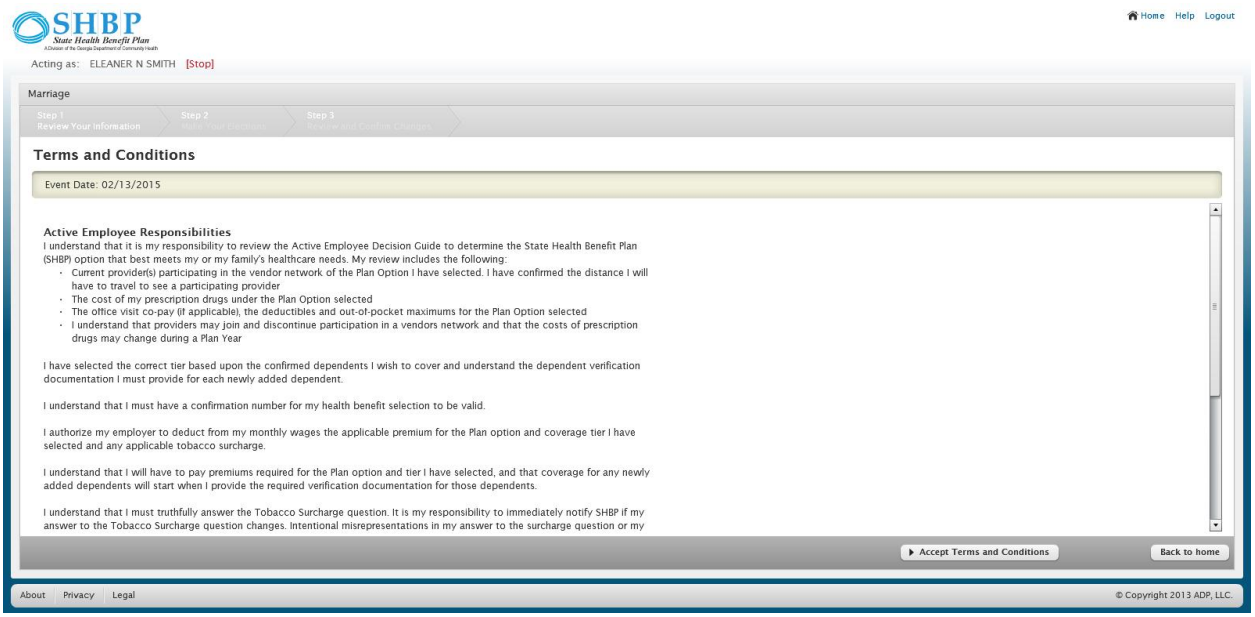
This allows user with appropriate security level access to update indicative data (i.e. spelling of name, birth date, SSN changes) on a dependent.

1. Log on to the SHBP Enrollment Portal. Click "+" next to Search. Choose Member Search. Enter appropriate member details. Choose Act as this employee.

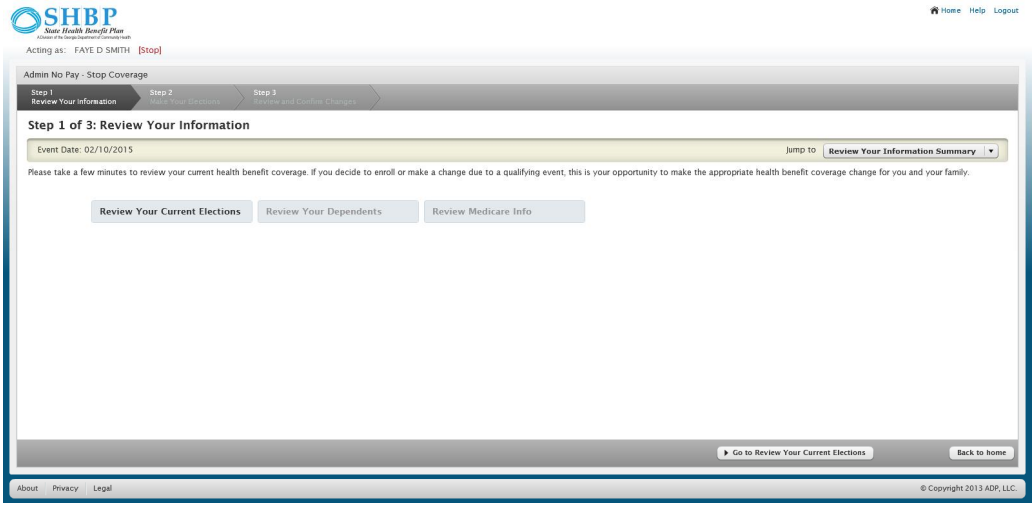
   Declare Qualifying Event as an Admin Event and enter in the appropriate Event Date.



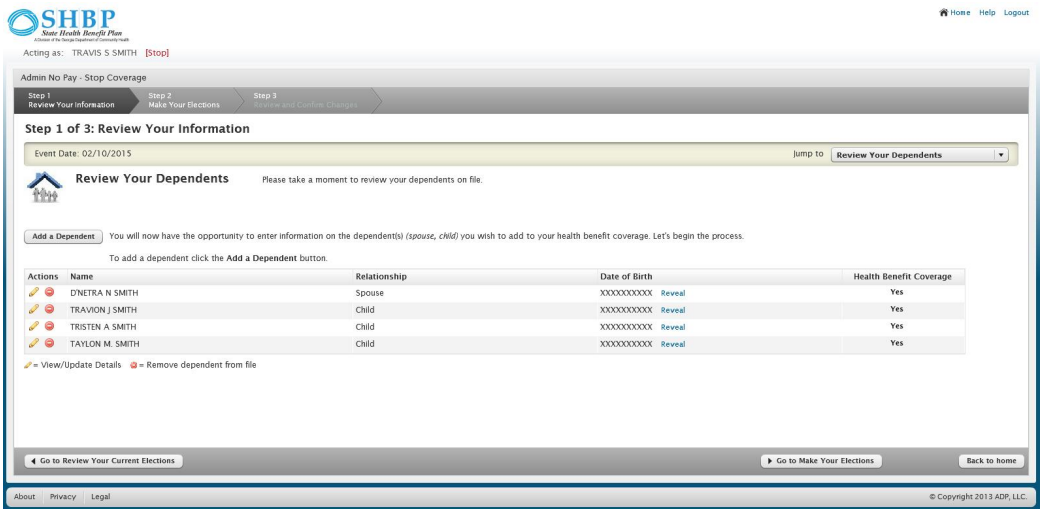
2. On the Welcome page, click Accept Terms and Conditions.



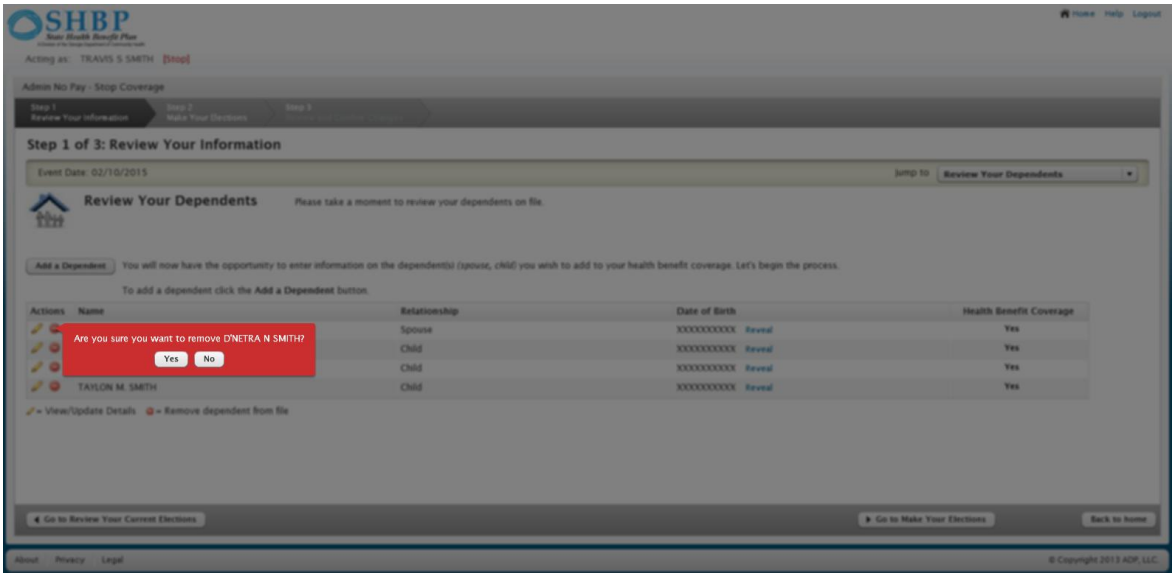
3. On the Review Your Information page, click Review Your Dependents.



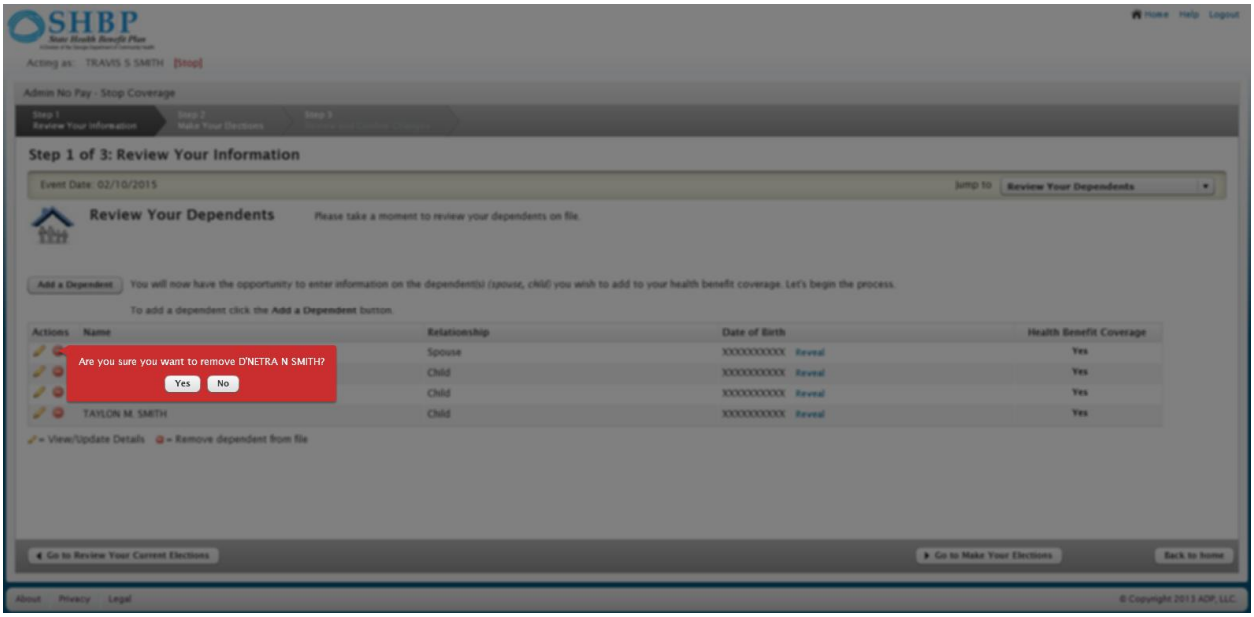
4. Select next to the dependent that requires the indicative data update. This will remove the dependent from the record.



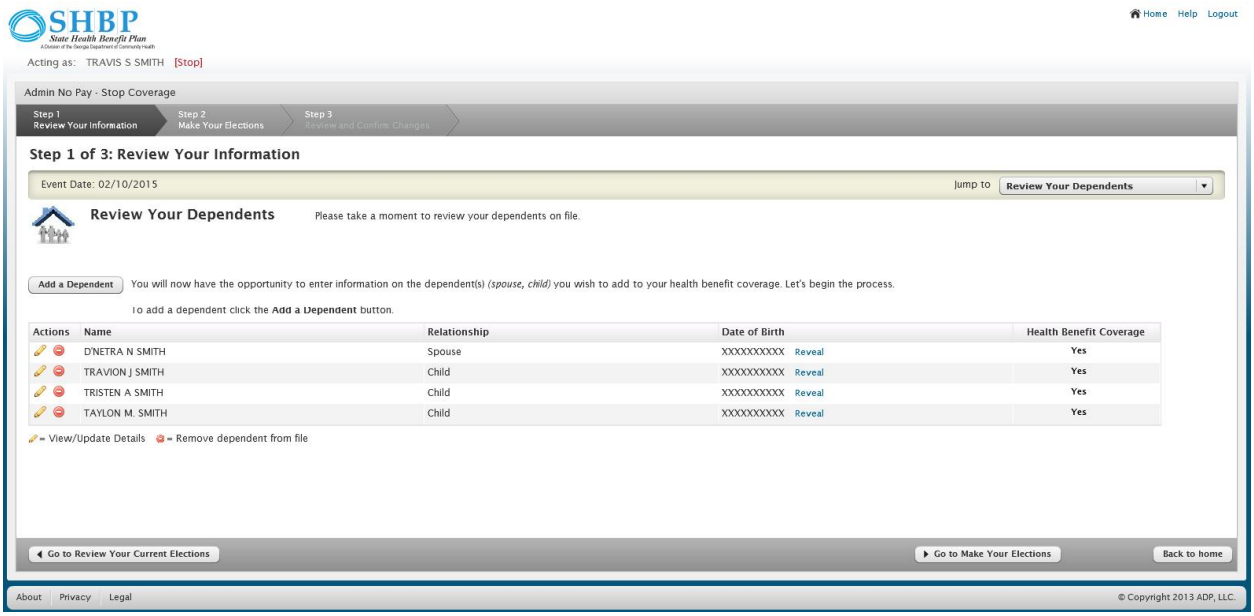
5. Click Yes to confirm the dependent should be removed.



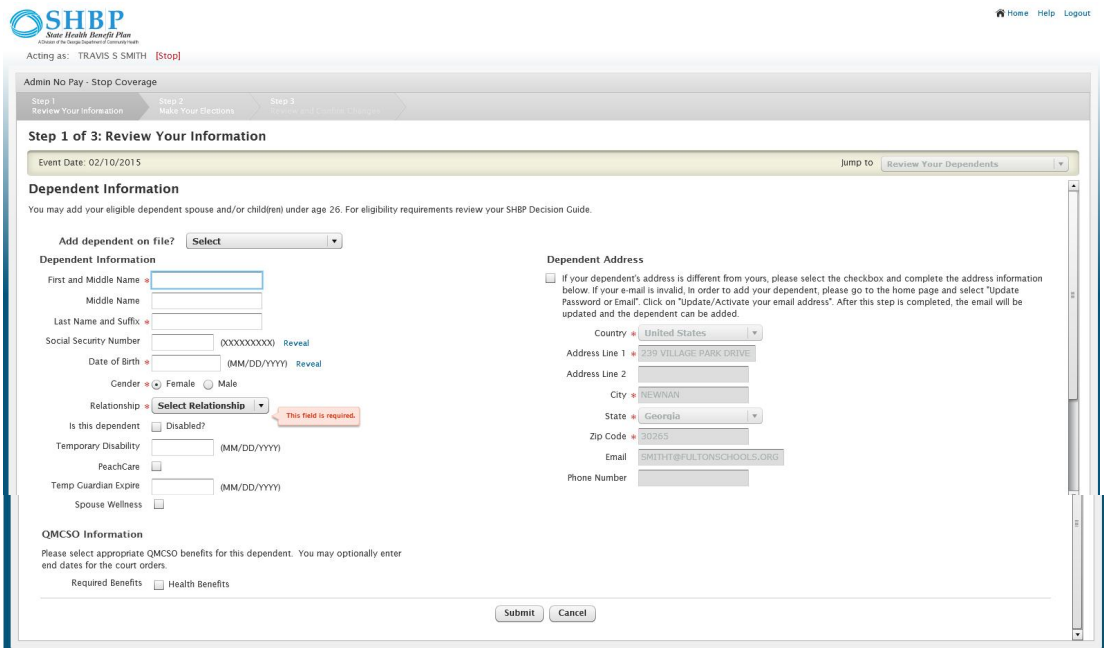
6. Click Yes to confirm the dependent should be removed.



7. Next, add the dependent back into the system with the appropriate details by clicking Add a Dependent.



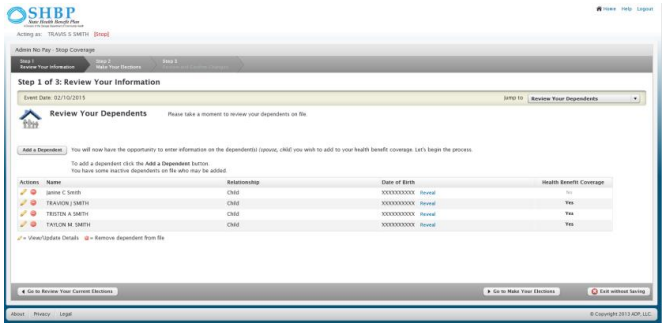
8. The Add Dependent Information screen displays with required fields noted. Verify data entry as complete. Click Submit at the bottom of the screen.

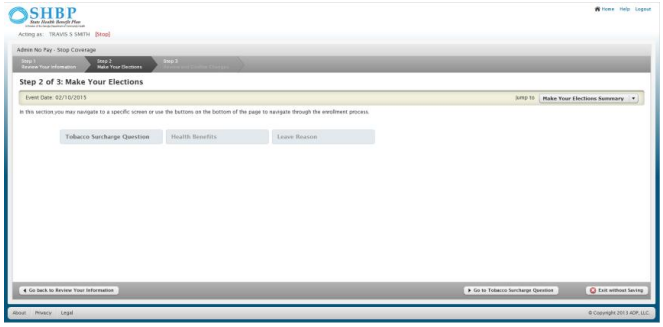


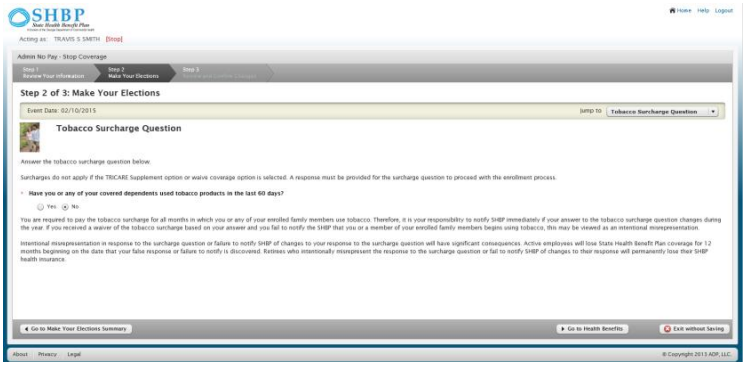
9. Move through the following screens and confirm changes:

- Go to Make Your Elections
- Go to Tobacco Surcharge Question
- Go to Review and Confirm Changes

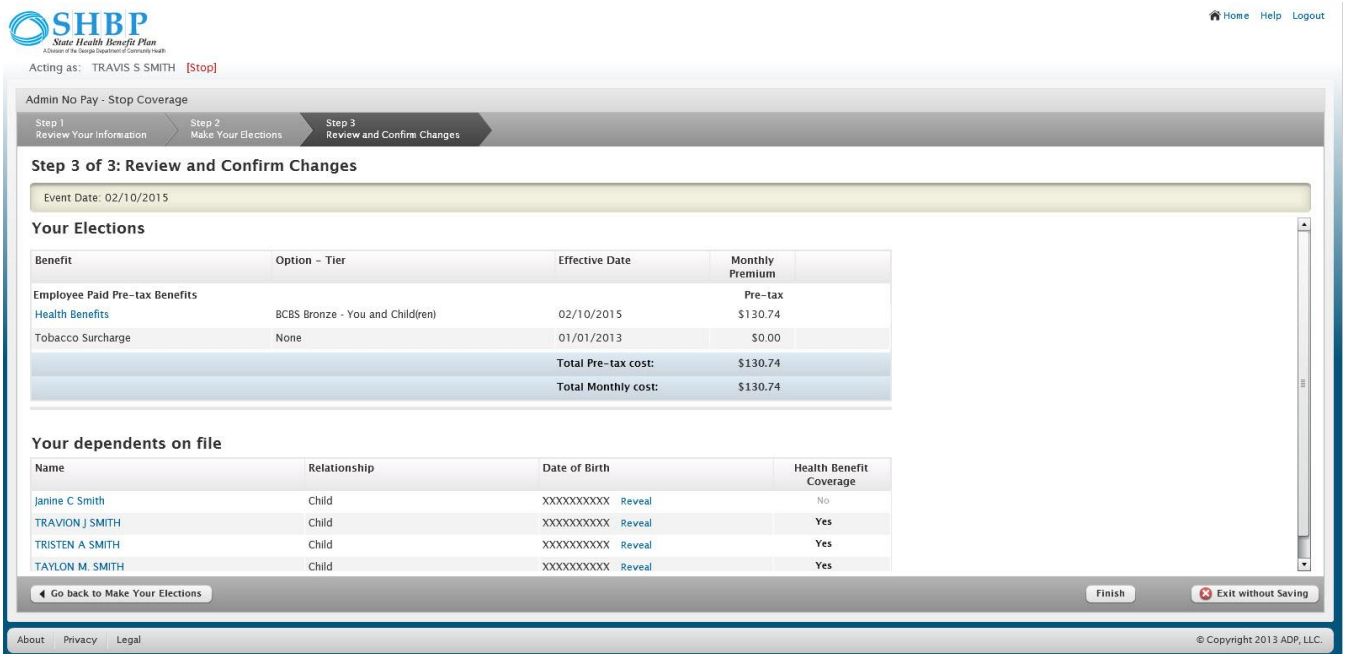
Note: Do not make enrollment changes to medical unless needed.







10. Complete the enrollment by clicking Finish.

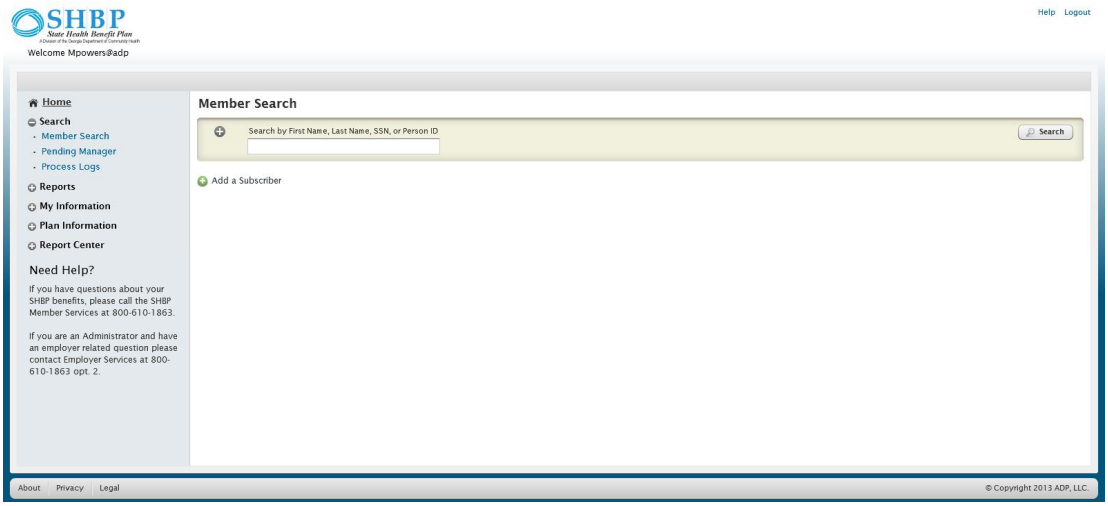


ADP email communication
No ADP email communication

DATA SHARING TOOL > ADD SUBSCRIBER/NEW HIRE DATA ENTRY

This allows a user with appropriate security level access to enter a new hire directly into the ADP system as opposed to updating the data through an input file. The only type of member that should be entered is an ACTIVE member (no contractors, no retirees).

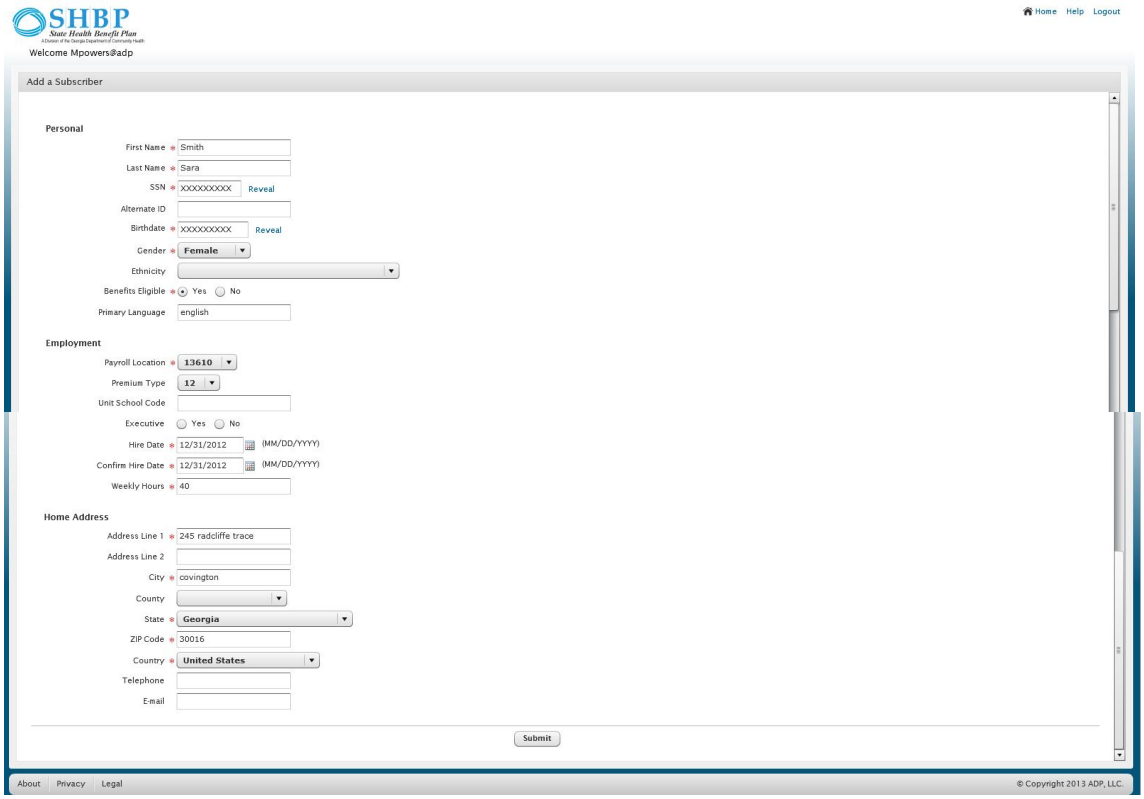
1. Log on to the SHBP Enrollment Portal. Click Search. Choose Member Search. Enter the appropriate member details. Search for the member to ensure their employment data is not already in the SHBP Enrollment Portal Site. If member is not within the system, click Add Subscriber.



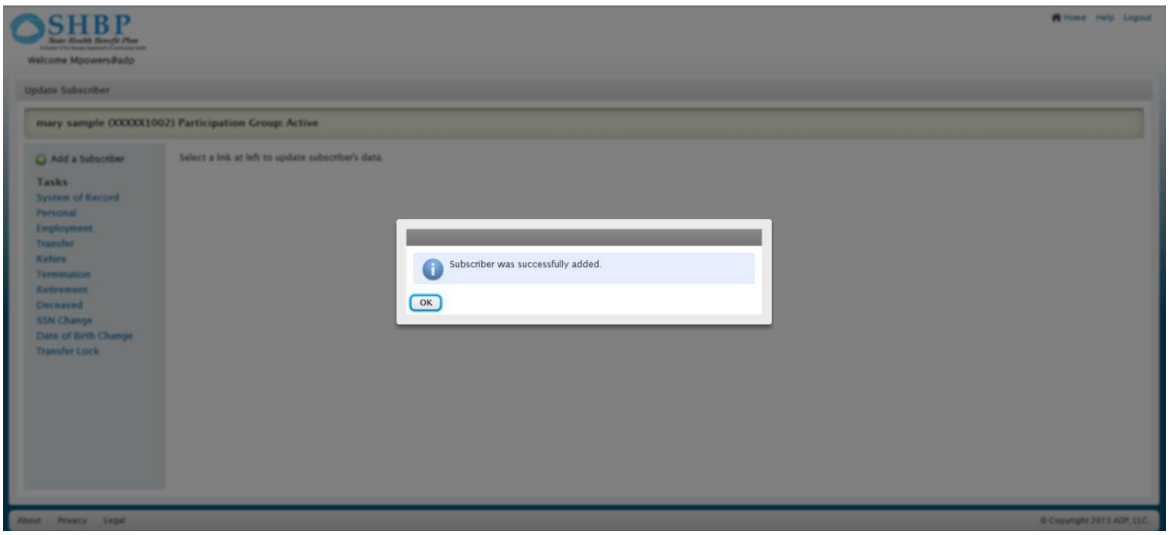
2. The Add Subscriber page displays. Enter any field that has an asterisk next to it. <u>These are required fields</u>. If not entered, the record creation of the member record will fail.

   Note:
   - Depending on the field type, select text from a drop down list or select from the data picker.
   - Benefit eligibility rules are enforced by the ADP system. To minimize any member impact for enrollment opportunity, ensure accuracy of data entry.

   If at all possible, enter an email address for the member. This will ensure the new member notified with a "New Enrollment" notification email. After all required fields are entered, click: Submit.



3. Confirmation of the newly added member appears.

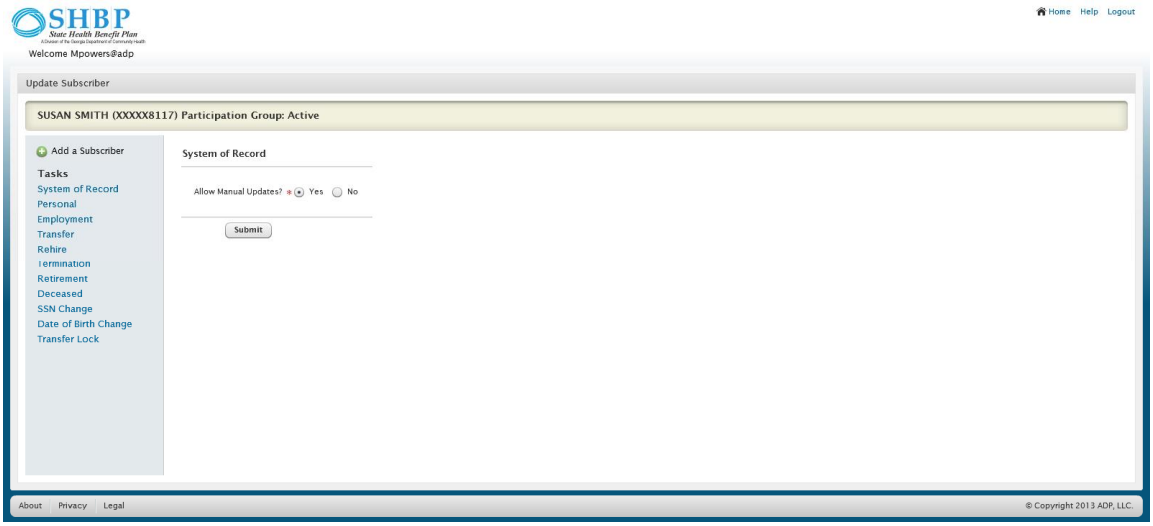


DATA SHARING TOOL > SYSTEM OF RECORD

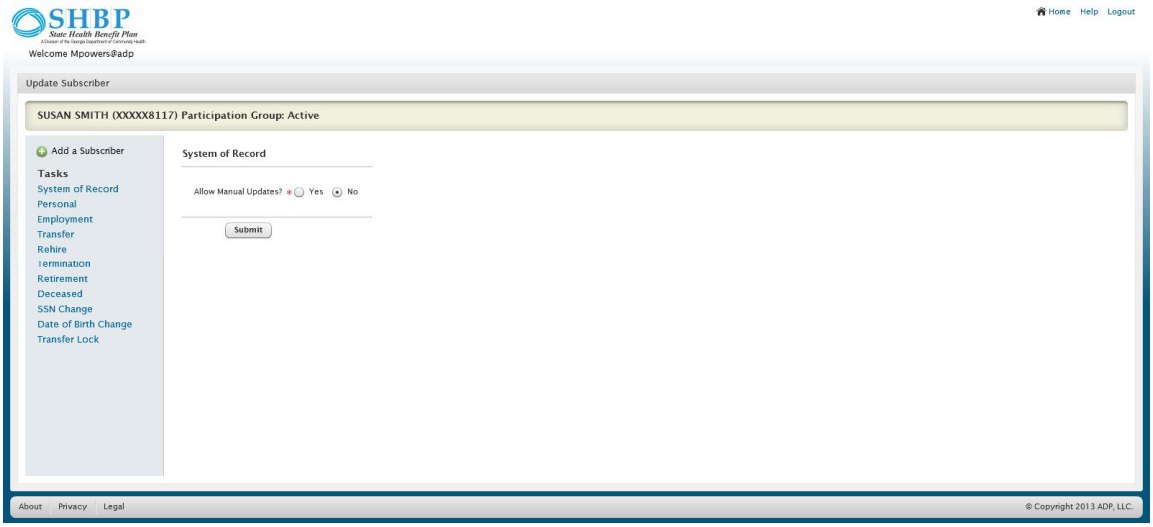
This allows an Admin the ability to update a member record via the Data Sharing Tool.

1. Log on to the SHBP Enrollment Portal. Click Search. Choose Member Search. Enter the appropriate member details. Next to Member Name, click the green arrow, and choose the 'pencil' to Update this employee. Click System of Record. System of Record must be listed as Yes in order for the record to be updated via the Data Sharing Tool.

   Note: If the Data Sharing Tool is used on an escalated situation, and the member is normally sent on a file, the location's system of record must be updated as well to ensure data is not overwritten.



2. After making changes in the Data Sharing Tool, go back to System of Record, and click No to ensure record is locked. This will set the system of record back to be 'not manual'.



DATA SHARING TOOL > PERSONAL

This allows a user with an appropriate security level access to update certain indicative data for members (i.e., first and last name, SSN, birth date, gender, Payroll Location and address).

1. Log on to the SHBP Enrollment Portal. Click "+" next to Search. Choose Member Search. Enter appropriate member details. Next to Member Name, click the green arrow, and choose the 'pencil' to Update this employee. Click System of Record. System of Record must be listed as Yes in order for the record to be updated via the Data Sharing Tool.

   Note: If the Data Sharing Tool is used on an escalated situation, and the member is normally sent on a file, the location's system of record must be updated as well to ensure data is not overwritten.

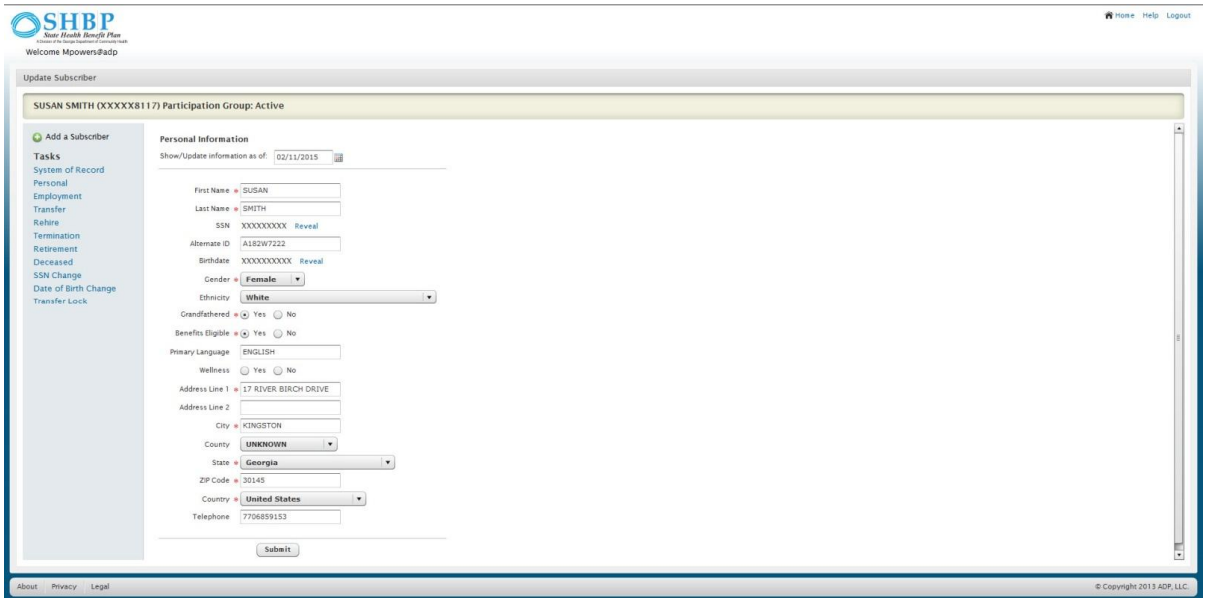
   The Update Subscriber page displays. Under Tasks, choose Personal. Enter the effective date of the change. Note: Typically, this is the date of hire or date of address change, for example. Update the desired personal indicative data changes. Grandfather Question must be answered. The definition of Grandfather means that a member is 'automatically' benefits eligible, and does not look at DOH or location to determine eligibility.

   Note: DOB and SSN changes will be a separate task in the future.

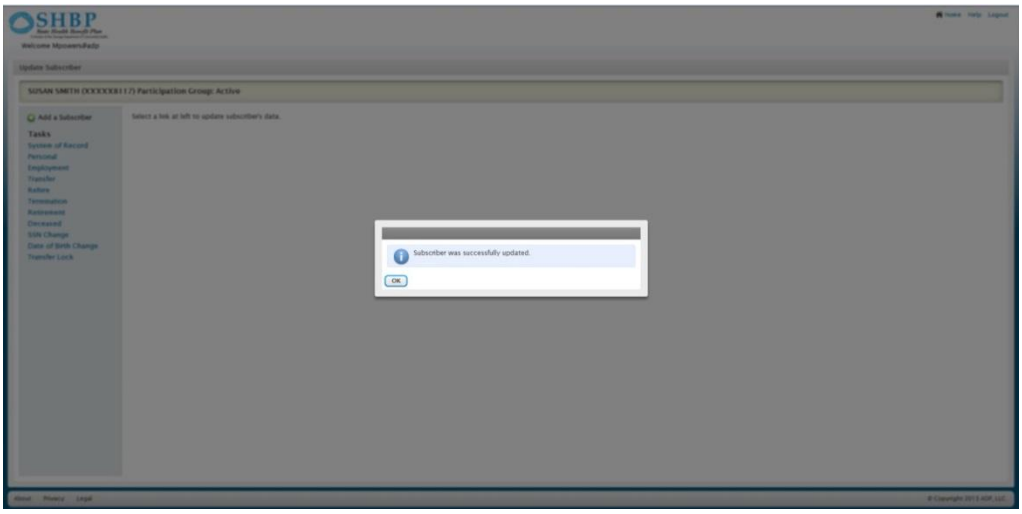
   Note:

- Depending on the field type, select text from a drop down list or select from the data picker.
- Benefit eligibility rules are enforced by the ADP system. To minimize any member impact for enrollment opportunity, ensure the accuracy of data entry.

After all required fields are entered click: Submit.

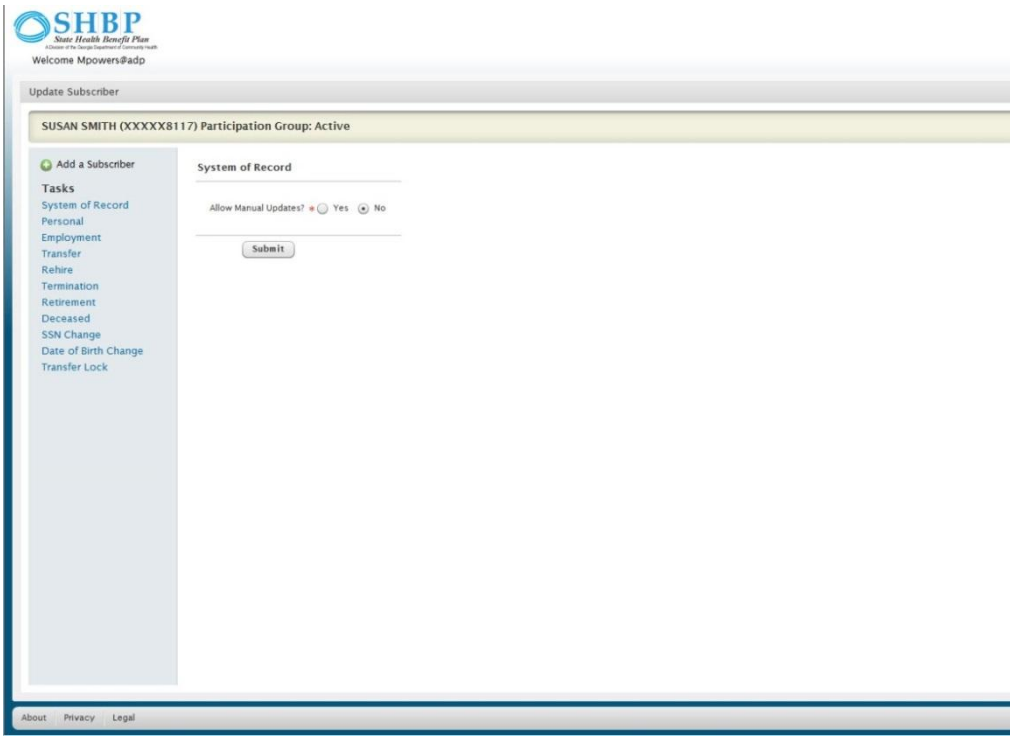


2. Confirmation of updates made displays.



3. After making changes in the Data Sharing Tool, go back to System of Record, and click No to ensure record is locked. This will set the system of record back to be 'not manual'.

   System Timing
   After confirmation that the change was added, the member can log in online and view the changes.



ADP email communication
No ADP email communication

DATA SHARING TOOL > EMPLOYMENT

This allows a user with appropriate security level access to update specific employment data for members (i.e., employment status, scheduled hours, hire date, compensation and Payroll Location).

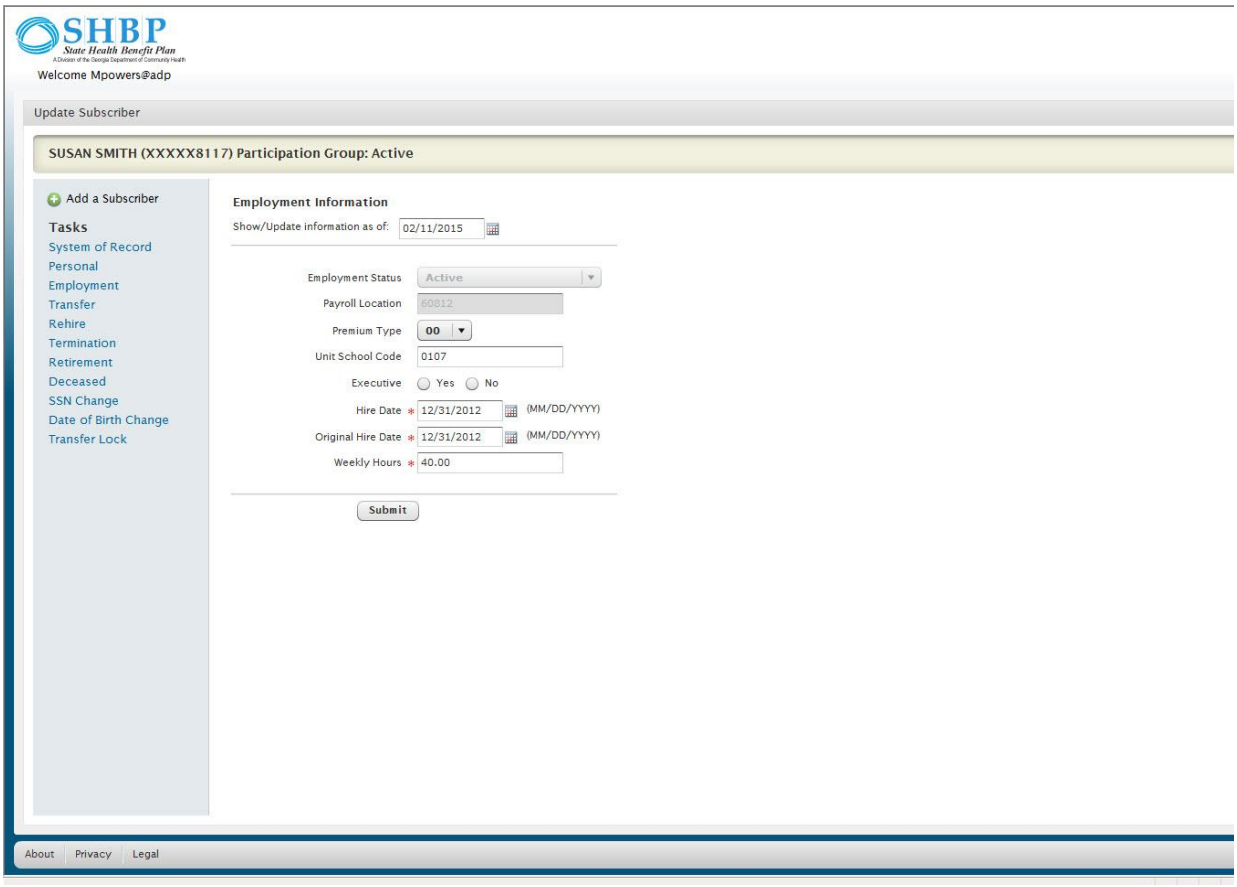
1. Log on to the SHBP Enrollment Portal. Click "+" next to Search. Choose Member Search. Enter appropriate member details. Next to Member Name, click the green arrow, and choose the 'pencil' to Update this employee. Click System of Record. System of Record must be listed as Yes in order for the record to be updated via the Data Sharing Tool.

   Note: If the Data Sharing Tool is used on an escalated situation, and the member is normally sent on a file, the location's system of record must be updated as well to ensure data is not overwritten.

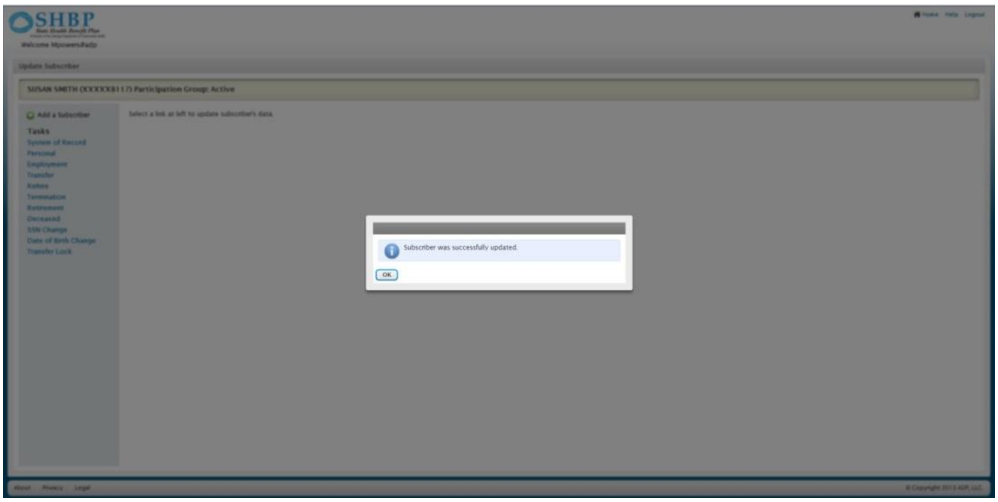
2. The Update Subscriber page displays. Under Tasks, choose Employment. Enter the effective date of the change. Note: Typically, this is the date of hire or date of address change, for example. Update the desired employment data changes.
   - Weekly compensation
   - Hours
   - Premium Type for Retirees

   Note:
   - Depending on the field type, select text from a drop down list or select from the data picker.
   - Hire Date and Original Hire Date functionality may be revised; these items will only be visible.

   After all required fields are entered, click Submit.

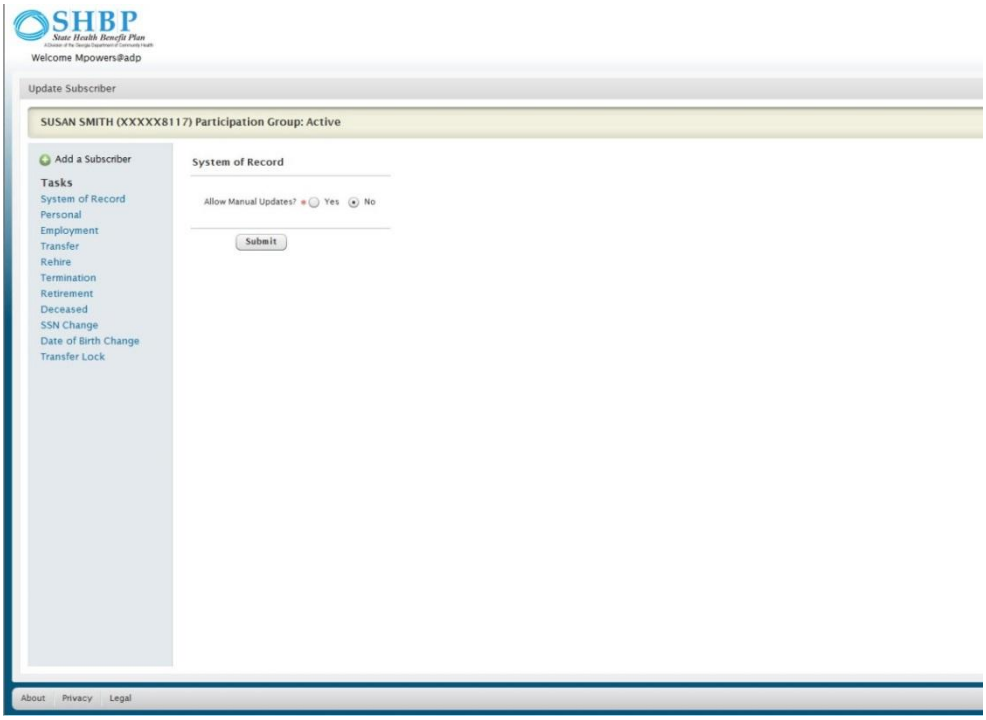


3. Confirmation of updates made displays.



4. After making changes in the Data Sharing Tool, go back to System of Record, and click No to ensure record is locked. This will set the System of Record back to be 'not manual'.

   System Timing
   After confirmation that the change was added, the member can log in online and view the changes.



ADP email communication
No ADP email communication

DATA SHARING TOOL > TRANSFER

This event will be utilized by SHBP Admins with the appropriate access to update a member's record if they are part of a transfer to a new agency/Payroll Location.

Note:

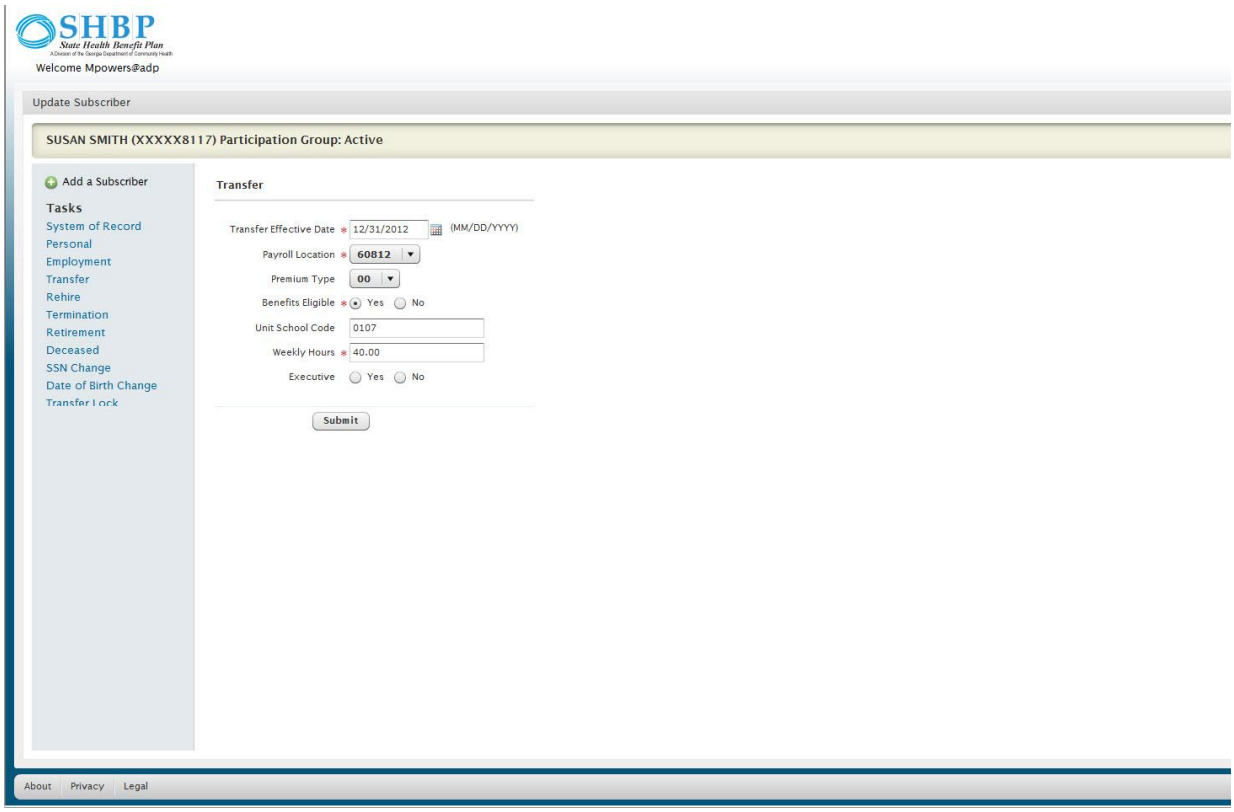
- *Agency Admins will only be able to process transfers on members they have security access to see. Due to the security restriction, most of the use of transfer function could be from the SHBP Administrative Solutions Team.*
- *If the member's hire date is greater than the previous hire date, and the agency sends a file, the Data Sharing Tool should not be used and you should contact your assigned SHBP AST representative for support.*

1. Log on to the SHBP Enrollment Portal. Click "+" next to Search. Choose Member Search. Enter appropriate member details. Next to Member Name, click the green arrow, and choose the 'pencil' to Update this employee. Click System of Record.

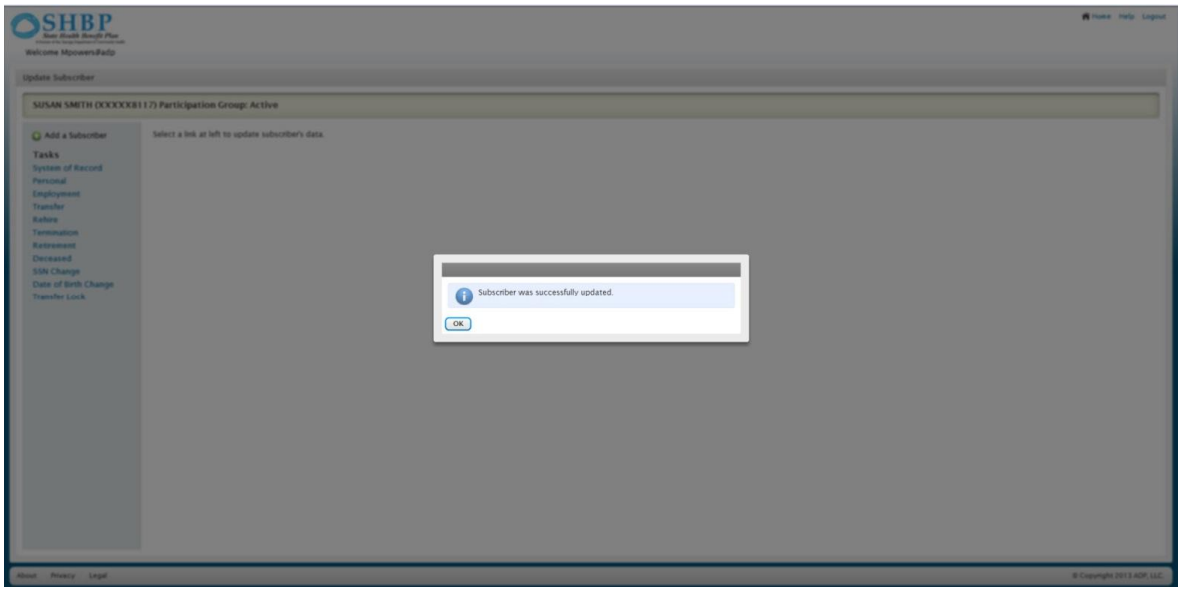
   System of Record must be listed as Yes in order for the record to be updated via the Data Sharing Tool. Note: If the Data Sharing Tool is used on an escalated situation, and the member is normally sent on a file, the location's system of record must be updated as well to ensure data is not overwritten.

2. Click Transfer. The following fields must be updated:
   - Effective Date (as date of the transfer)
   - Payroll Location (verify accuracy)
   - Benefits Eligible
   - Weekly Hours

   Note: The transfer effective date is the date the member joined the new Payroll Location/ Agency. Once completed, click Submit.

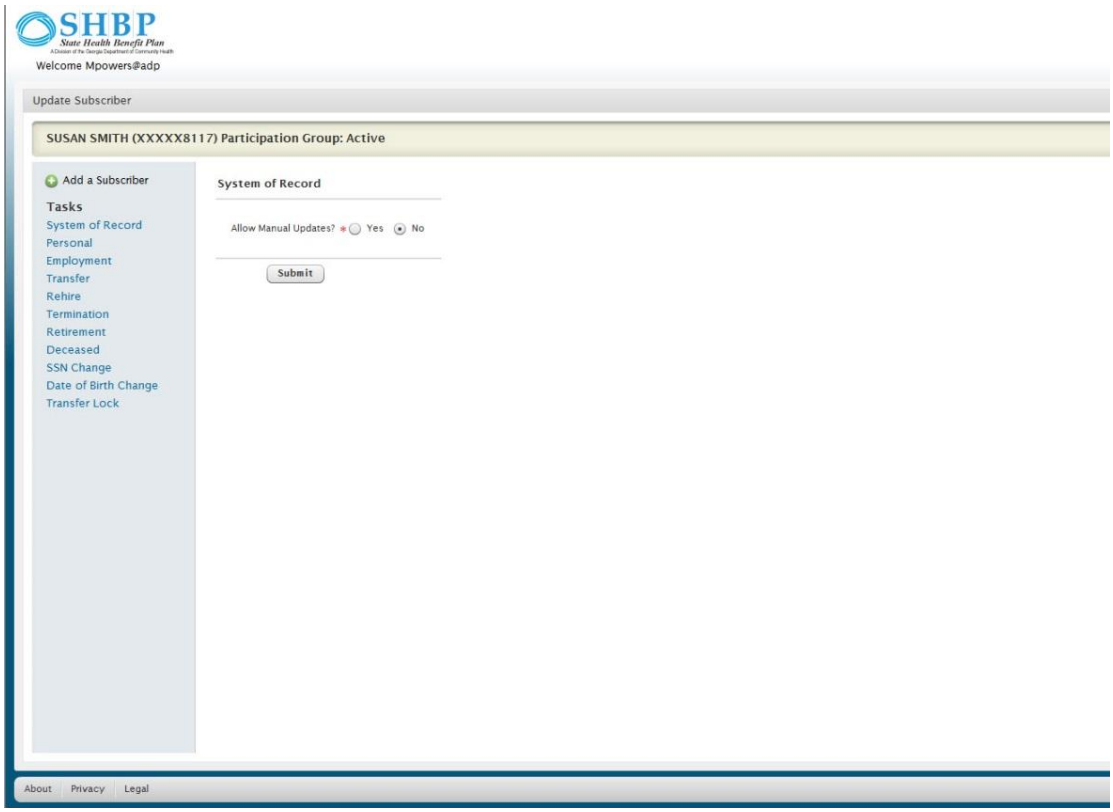


3. Confirmation of the save displays.



4. After making changes in the Data Sharing Tool, go back to System of Record, and click No to ensure record is locked. This will set the System of Record back to be 'not manual'.

   System Timing
   After confirmation that the change was added, the system will recalculate benefits and rates. The member can log in online, and view the changes immediately.



ADP email communication
No ADP email communication

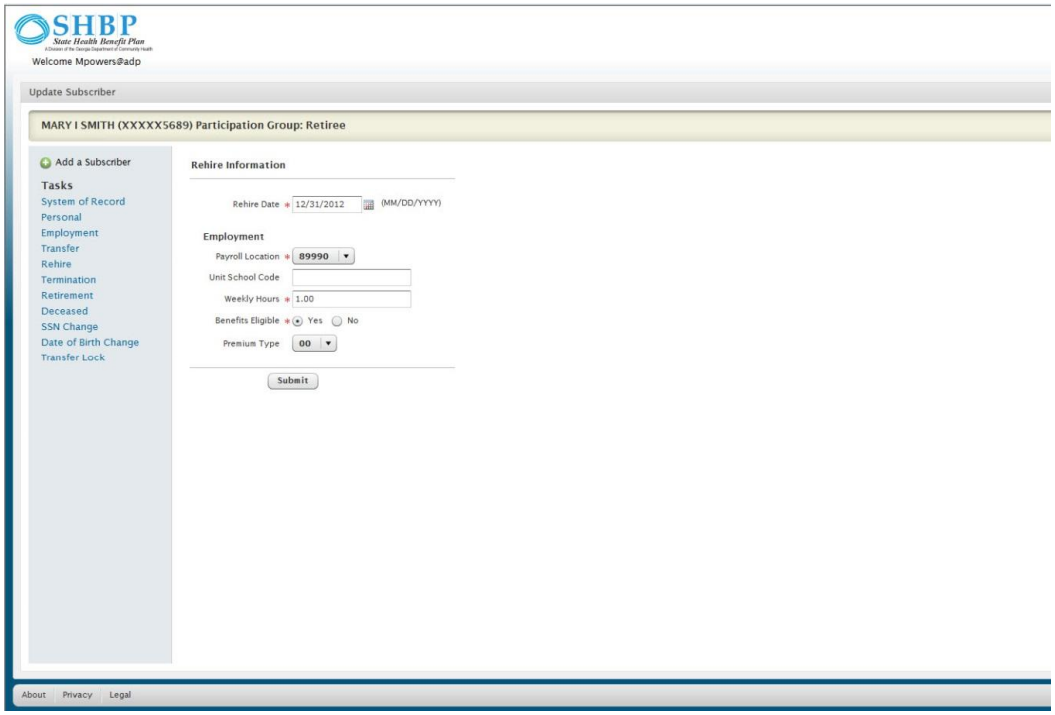
DATA SHARING TOOL > REHIRE

This allows a user with appropriate security level access to update specific Rehire data for Members.

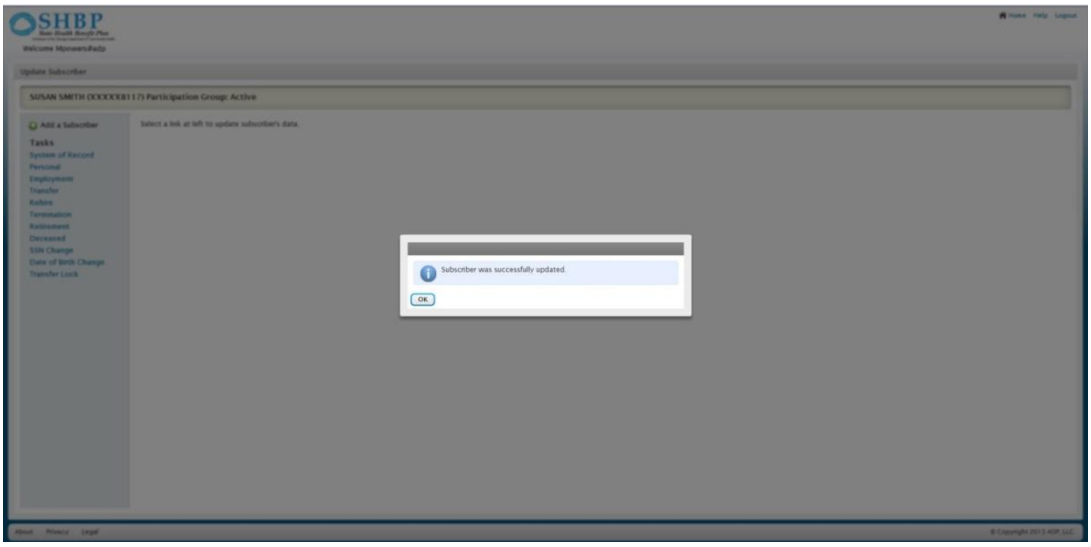
1. Log on to the SHBP Enrollment Portal. Click "+" next to Search. Choose Member Search. Enter appropriate member details. Next to Member Name, click the green arrow, and choose the 'pencil' to Update this employee. Click System of Record.

   System of Record must be listed as Yes in order for the record to be updated via the Data Sharing Tool. Note: If the Data Sharing Tool is used on an escalated situation, and the member is normally sent on a file, the location's system of record must be updated as well to ensure data is not overwritten.

2. The Update Subscriber page displays. Under Tasks, choose Rehire. On the Rehire Information screen, enter the rehire date in the Adjusted Hire Date field. After all required fields are entered, click Submit.



3. Confirmation of the updates made displays.



DATA SHARING TOOL > TERMINATION

This allows a user with an appropriate security level access to update specific termination data for members.

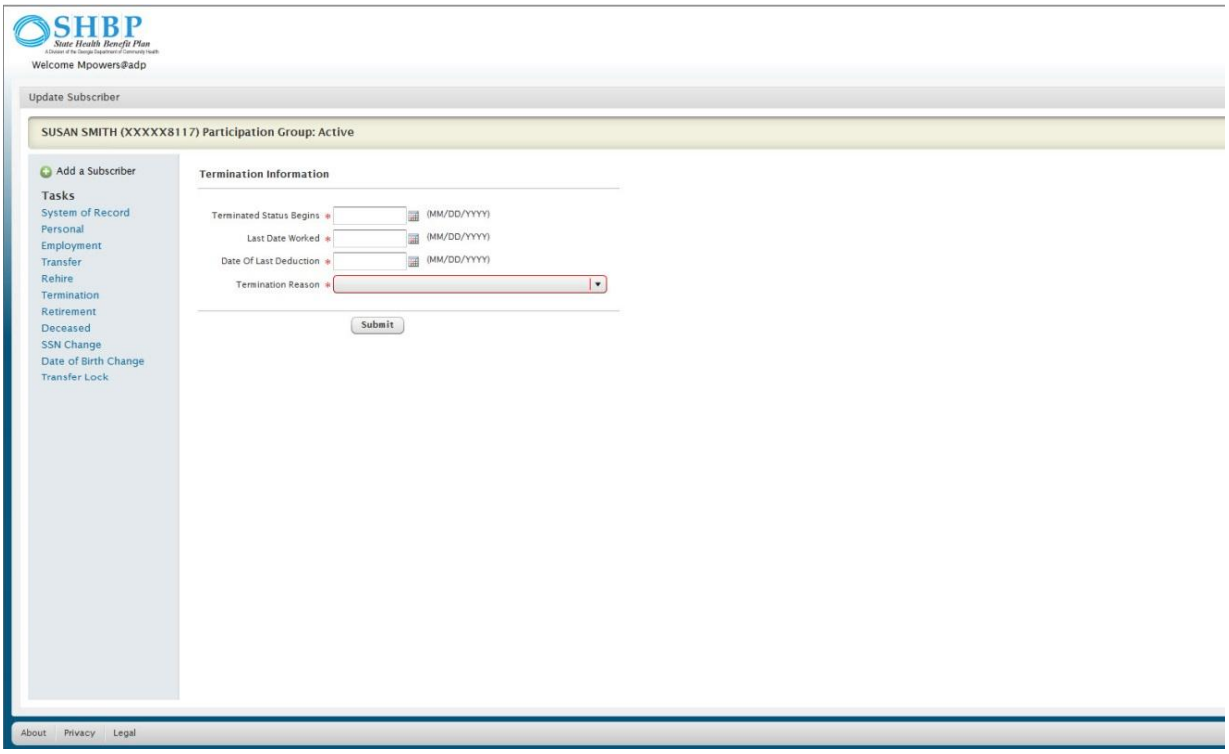
1. Log on to the SHBP Enrollment Portal. Click "+" next to Search. Choose Member Search. Enter appropriate member details. Next to Member Name, click the green arrow, and choose the 'pencil' to Update this employee. Click System of Record. System of Record must be listed as Yes in order for the record to be updated via the Data Sharing Tool.

   Note: If the Data Sharing Tool is used on an escalated situation, and the member is normally sent on a file, the location's system of record must be updated as well to ensure data is not overwritten.

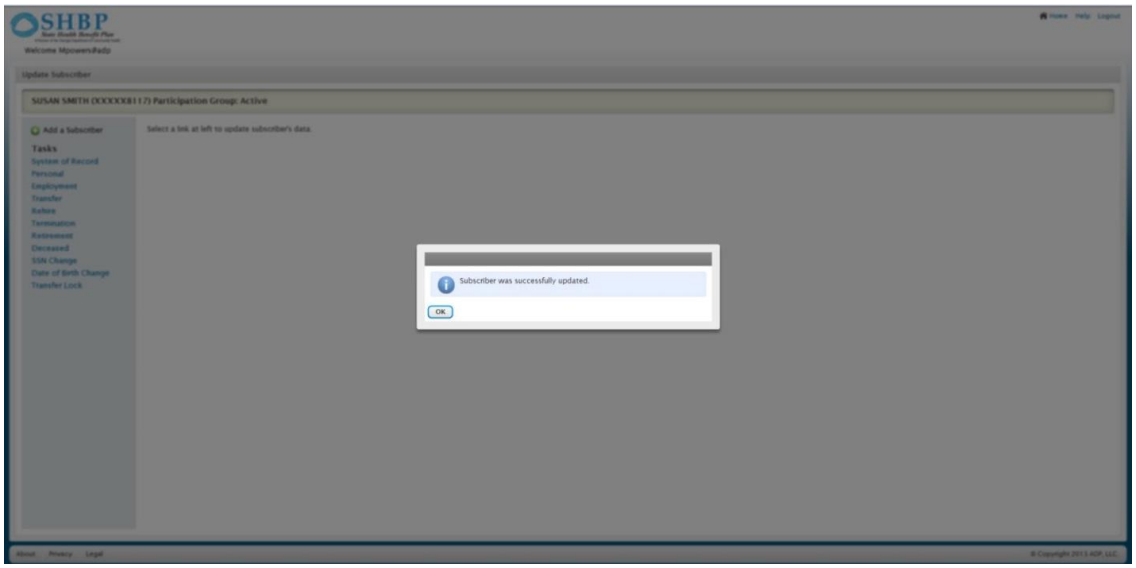
2. The Update Subscriber page displays. Under Tasks, choose Termination. On the Termination Information screen, enter the Termination date and the coverage end date. Select the Termination Reason from the drop down box.

   Term Date = the first day no longer employed.
   Last day worked = Last day working

   After all required fields are entered, click: Submit.

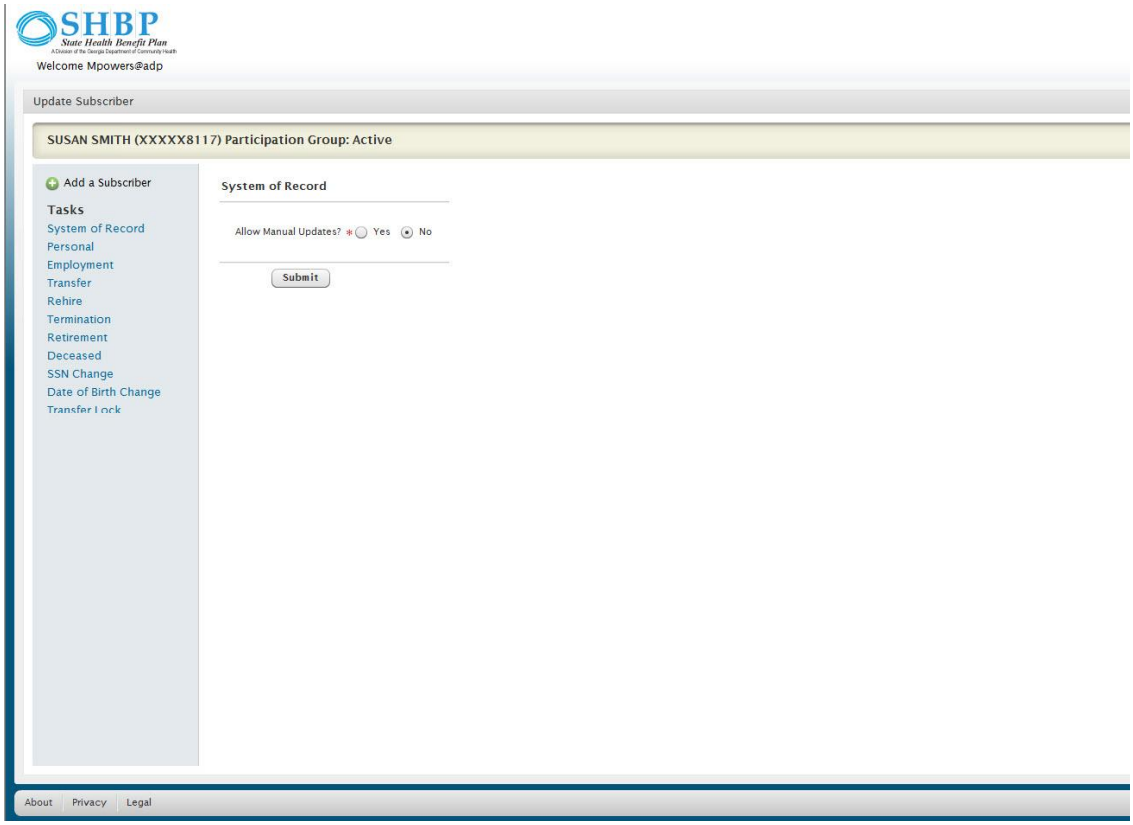


3. Confirmation of the updates made displays.



4. After making changes in the Data Sharing Tool, go back to System of Record, and click No to ensure record is locked. This will set the System of Record back to be 'not manual'.

   System Timing
   After confirmation that the change was added, the Admin can log in online, and view the changes.

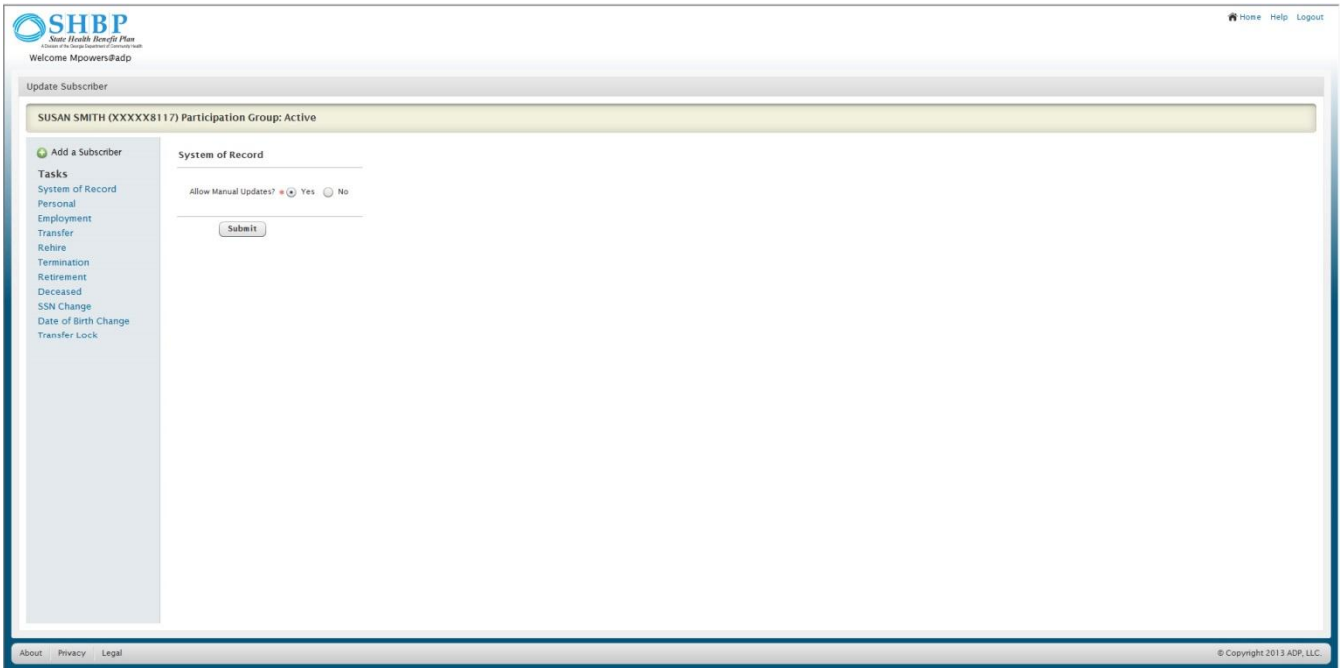


ADP email communication
No ADP email communication

DATA SHARING TOOL > RETIREMENT

1. Log on to the SHBP Enrollment Portal. Click "+" next to Search. Choose Member Search. Enter appropriate member details. Next to Member Name, click the green arrow, and choose the 'pencil' to Update this employee. Click System of Record. System of Record must be listed as Yes in order for the record to be updated via the Data Sharing Tool.

   Note: If the Data Sharing Tool is used on an escalated situation, and the member is normally sent on a file, the location's system of record must be updated as well to ensure data is not overwritten.



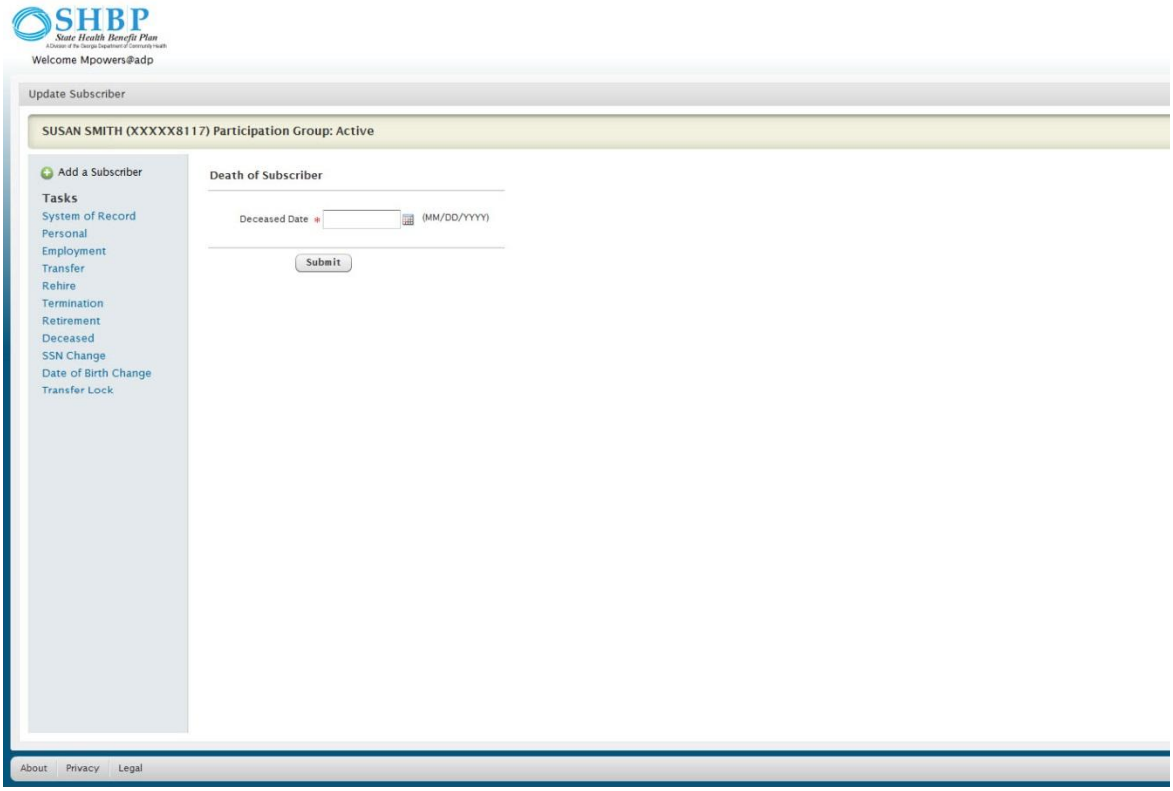
DATA SHARING TOOL > DECEASED

This allows a user with appropriate security level access to update specific death data for members.

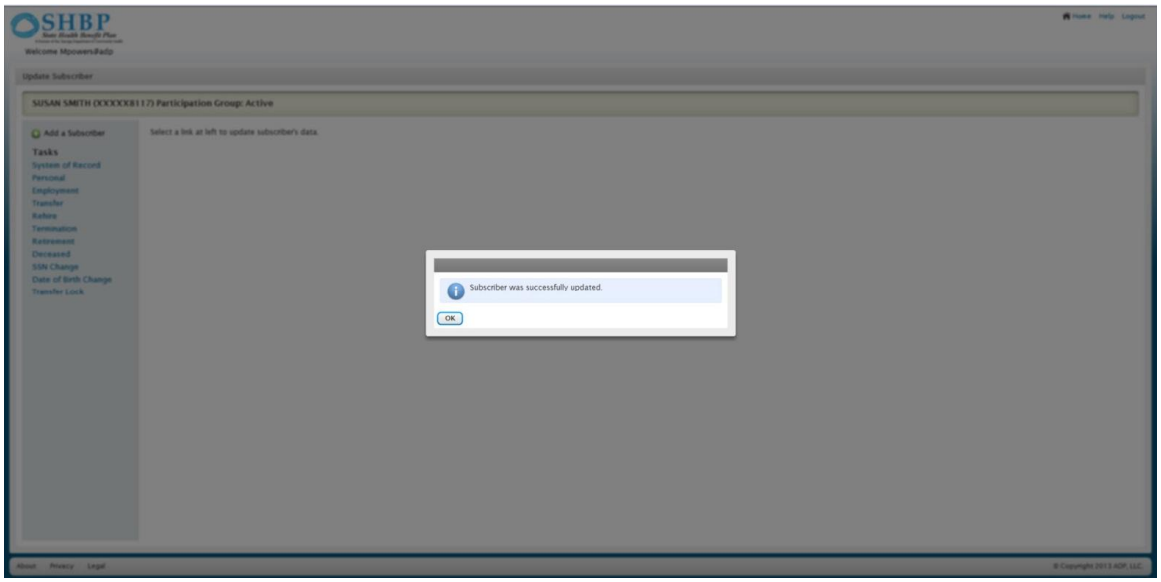
1. Log on to the SHBP Enrollment Portal. Click "+" next to Search. Choose Member Search. Enter appropriate member details. Next to Member Name, click the green arrow, and choose the 'pencil' to Update this employee. Click System of Record. System of Record must be listed as Yes in order for the record to be updated via the Data Sharing Tool.

   Note: If the Data Sharing Tool is used on an escalated situation, and the member is normally sent on a file, the location's system of record must be updated as well to ensure data is not overwritten.

2. The Update Subscriber page displays. Under Tasks, choose Deceased. Enter the date of death for the subscriber. After all required fields are entered, click Submit.

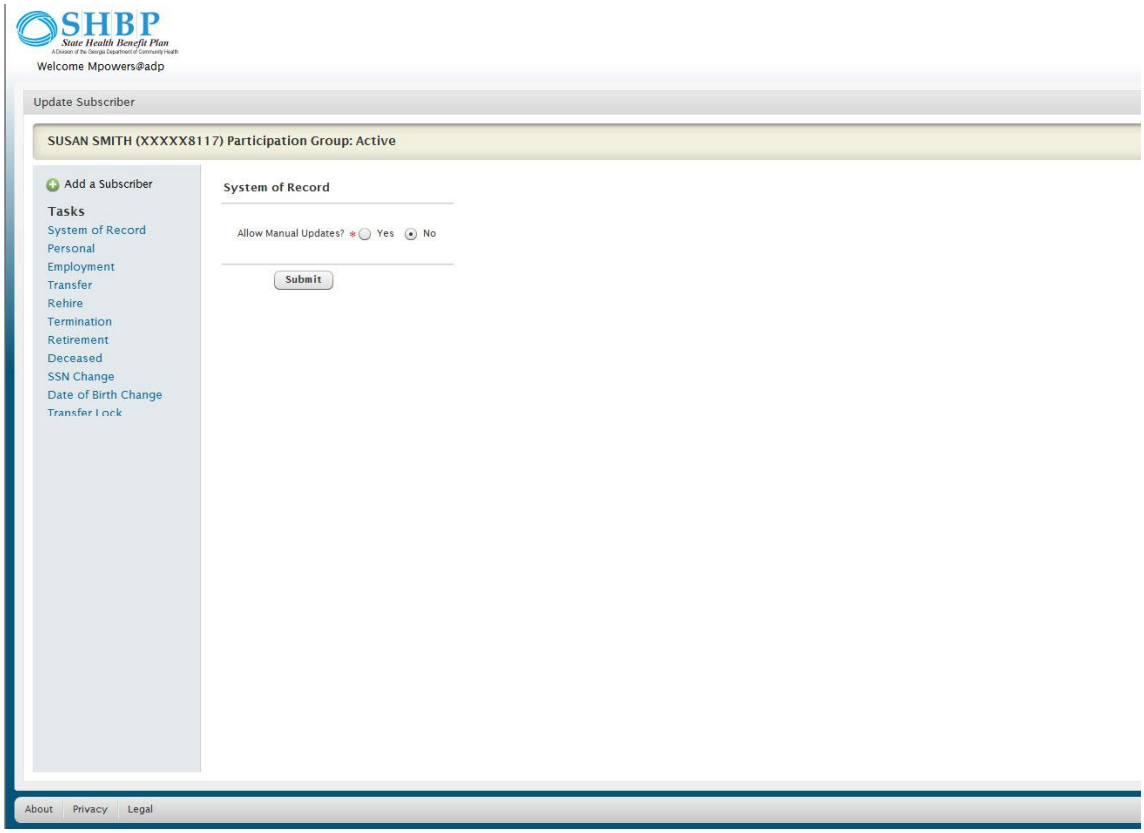


3. Confirmation of the updates made displays.



4. After making changes in the Data Sharing Tool, go back to System of Record, and click No to ensure record is locked. This will set the System of Record back to be 'not manual'.

   System Timing
   After confirmation that the change was added, the Admin can log in online, and view the changes.



ADP email communication
No ADP email communication

DATA SHARING TOOL > LEAVE OF ABSENCE

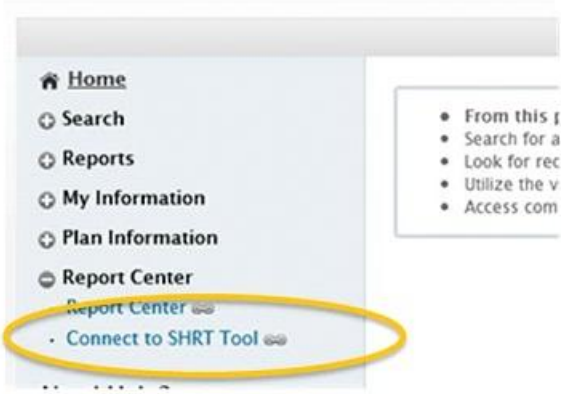
Leave of Absence is not managed in the Data Sharing Tool or SHBP Enrollment Portal. SHBP Enrollment Portal will never reflect a member on a Leave of Absence status.

STATE HEALTH REPOSITORY TOOL (SHRT)

The State Health Repository Tool (SHRT) is a web-based application that allows payroll locations to share data with SHBP.

Accessing SHRT

SHRT is accessed through the SHBP Enrollment Portal (mySHBPga.adp.com), and clicking the Connect to SHRT Tool link in the left-hand menu.



For details regarding how to access SHRT as well as your responsibilities related to the various reports and files please review the SHRT User Guide. This guide can be found on both the SHBP web site as well as in the Additional SHRT Instructions folder found on SHRT.