

# HAWAII EMPLOYER-UNION HEALTH BENEFITS TRUST FUND EMPLOYER PORTAL TRAINING

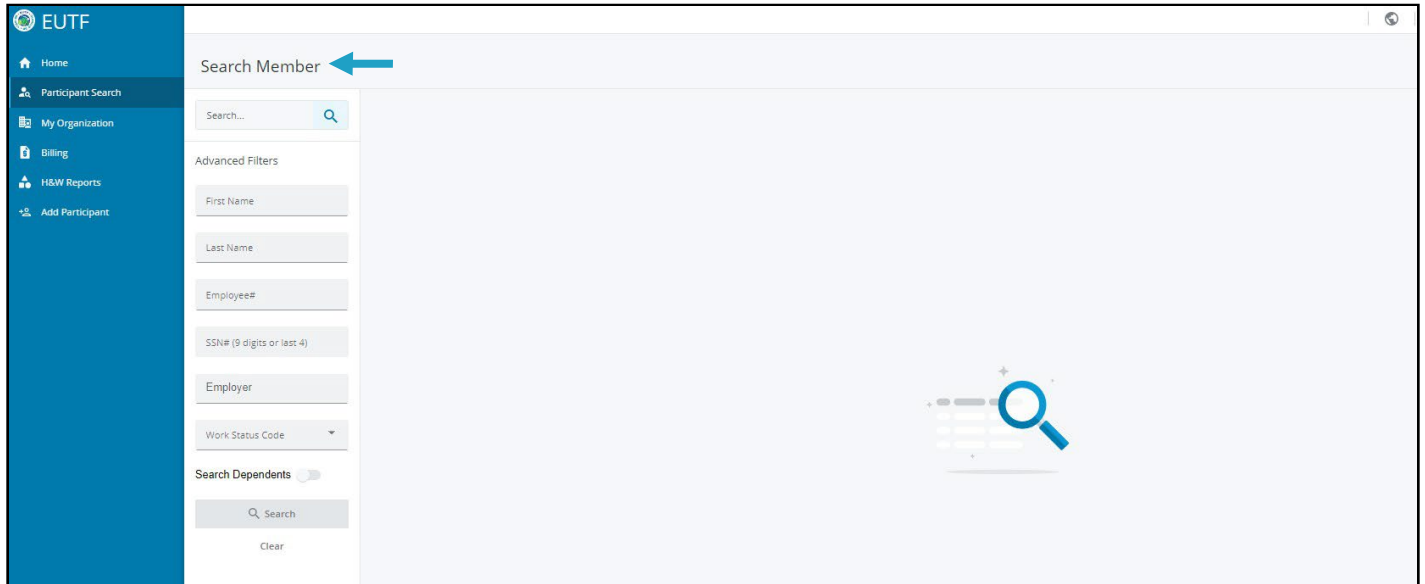


## EUTF Ariel BAS Basics

### **NOTICE OF CONFIDENTIALITY**

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## 2 - Basic Functionality - Search Member



The **Participant Search** menu allows you to search for employees and their dependents.

You have the option to use the **Advanced Filters** fields to search specific employees or dependents. These fields are:

- ✓ First Name
- ✓ Last Name
- ✓ Employee# (HB #)
- ✓ SSN# (9 digits or last 4)
- ✓ Employer
- ✓ Work Status Code

If you move the toggle switch to the right, you enable the **Search Dependents** option and your search criteria will be based on Dependents only.



## 2.1. Search for an Employee

Click on **Participant Search** from the left menu then the **Search Member** panel displays.

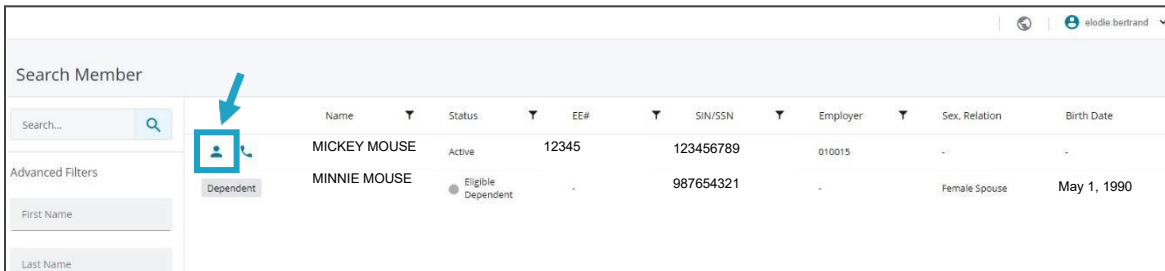
If the search matches to more than one employee, a list displays and you can select the correct employee from the search results. You may use a combination of partial or complete data in multiple fields. For example, using HB #, First and/or Last Name would reduce the number of results returned.

The best results are achieved when using a unique identifier, such as the HB #.

- 1 Type the employee's HB # in the field called **Employee #** and click the **Search** button. Only use the employee's HB # in this field. Using another type of employee number in this field will not return results.

The screenshot displays the EUTF (Employee Union Training Fund) interface. On the left is a blue navigation sidebar with the EUTF logo and the following menu items: Home, Participant Search (which is currently selected and highlighted in a darker blue), My Organization, Billing, H&W Reports, and Add Participant. The main content area on the right is titled "Search Member" and contains a search input field with a magnifying glass icon. Below this is an "Advanced Filters" section with several input fields: "First Name", "Last Name", "Employee#" (with a blue arrow pointing to the field), "SSN# (9 digits or last 4)", "Employer", and "Work Status Code" (a dropdown menu). At the bottom of the search area, there is a "Search Dependents" toggle switch, a "Search" button (with a blue arrow pointing to it), and a "Clear" button.

- 2 -The employee's name displays to the right of the **Search Member** panel.
- 3 -To access the employee's data, click the silhouette icon to the left of the employee's name.

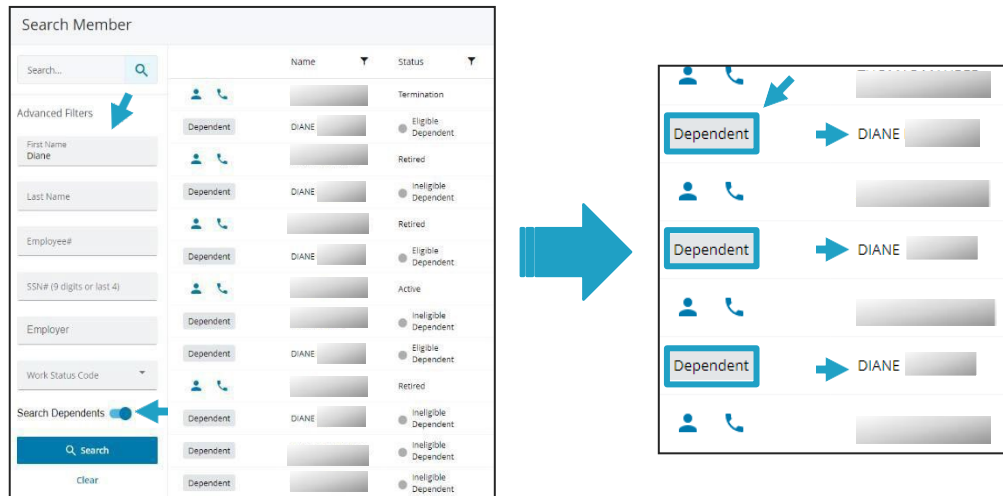


- 4 - The employee's Participant Profile screen displays. For more information about Participant Profile, refer to the section 3 - Exploring the Participant Profile.

## 2.2. Search for a Dependent

In the previous example, the search used the HB #, with the **Search Dependents** option disabled. The result displayed the employee possessing that number, with the name of that employee's documented dependent.

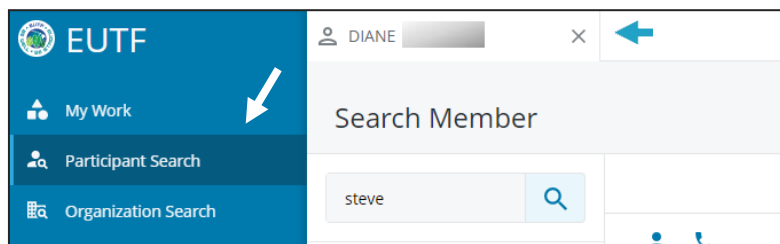
In the example below, the **First Name** criteria has been entered, and **Search Dependents** enabled. The search results include dependent names that fit the search criteria, along with the employee that the dependent is associated with.



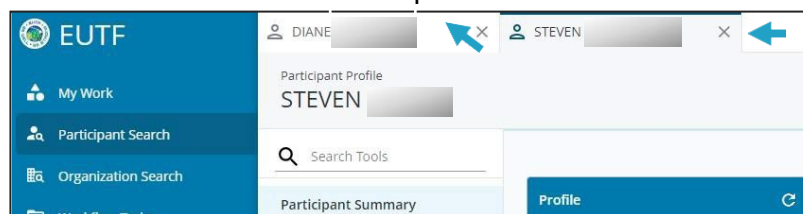
## 2.3. Search for Multiple Employees

To search for and open multiple employee profiles at the same time:

- 1 - Open an employee's profile by repeating the steps from the section 2.1 - Search for an Employee.
- 2 - Without closing the first selected profile, click on the **Participant Search** option from the left menu.
- 3 - The **Search Member** screen displays, but the employee's profile tab from the previous search remains at the top of the screen.



- 4 - Follow the same process to open another employee's profile.
- 5 - Note that both employee profile tabs are displayed at the top of the screen. The maximum number of tabs that can be open is 5.



- 6 - Click on either employee profile tabs to switch from one profile to the other.
- 7 - Click on the **X** on the tab to close a profile. The other profile remains open.

### 3 - Exploring the Employee's Profile

The **Participant Profile** screen (also identified on the left menu as **Participant Summary**) is the landing screen for an employee and displays snapshots of his/her information on file, including sections for **Personal Information, Dependents, Coverage, Enrollment History, Finance, and Documents.**

To open a snapshot window's display, click on the link at the bottom of each snapshot window.

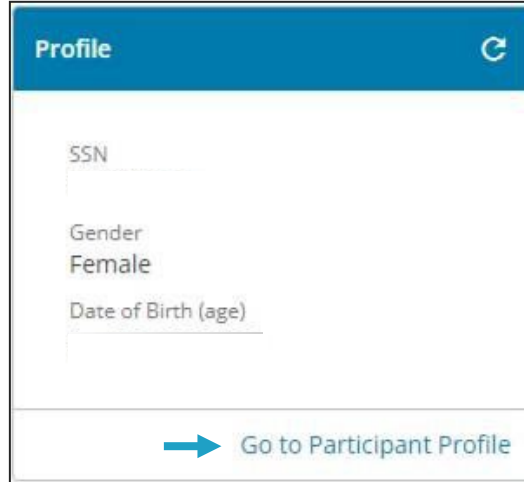
The screenshot displays the 'Participant Profile' interface for 'JANE EXAMPLE'. On the left is a navigation menu with 'Participant Summary' selected. The main content area features six snapshot windows, each with a refresh icon and a 'Go to' link at the bottom:

- Profile:** SSN: 123456789, Gender: Female, Date of Birth (age): February 1, 1972. Link: Go to Participant Profile.
- Dependents:** Lists ROBERT EXAMPLE (Former Spouse, DOB: May 1, 1975) and MARK EXAMPLE (Child, DOB: May 3, 1997). Link: Go to Dependents.
- Coverage:** Medical (EUTF PPO HMSA Medical (80/20) w/ Chiro, Self), Prescription Drug (EUTF PPO Prescription Drug (80/20) - CVS, Self), Dental (EUTF Dental, Self), Vision (EUTF Vision, Self), Life Insurance. Link: Go to Coverage.
- Finance:** Last Payment (Date: Jan 1, 2022, Amount: \$151.54), Last Adjustment (Date: Mar 13, 2022, Amount: \$303.08). Link: Go to Finance.
- Alerts:** No items to display. Link: Create an Alert.
- Required Documents:** No items to display. Link: Go to Required Documents.

## 3.1. Participant Summary

### 3.1.1. Profile Screen

The **Profile** Screen displays **Basic**, **Additional Information** and **Field History** for the elected employee. 1- Click the **Go to Participant Profile** link.



2- The system will display the **Personal Information** screen.

The screenshot displays the 'Participant Profile' for 'JANE EXAMPLE'. The page has a left sidebar with navigation options: Participant Summary, Participant Information (Personal Information, Contact, Dependents, Security Profile), Employment Information, Medicare Information, Coverage, Enrollment History, Communications, Log History, Billing, COBRA, and QMCSO. The main content area is divided into three sections: Basic Information, Additional Information, and Field History. The Basic Information section shows: Salutation: ., Gender: Female, SSN: 123456789, Last Name: EXAMPLE, Date of Birth: February 1, 1972, Employee ID: 123, Middle Name: T, Date of Death: ., Marital Status: Single, First Name: JANE, Age: 50 Years, 2 Months, and Suffix: . There is an 'Edit Participant' button in the top right of this section. The Additional Information section has a date selector set to 12/05/2016 and a table of various indicators and amounts. The Field History section is currently empty.

Retiree Medicare IRMAA/Non-standard Reimbursement Amount		Spouse Medicare IRMAA/Non-standard Reimbursement Amount		Disabled Indicator	Temporary Disabled
-	-	-	-	N	Dec 5, 2016
EBS Pension Indicator		Life Insurance Group		Life Insurance Coverage Type	Life Insurance Claim Number
-	-	-	-	-	-
Surviving Children Student Flag		Family Link Forfeiture		Medicare Part B DDA Audit	Medicare Pt B DDA Audit Reason
-	-	-	-	-	-
Non Payment Indicator		Originating Person ID	Security Types		
-	EG	Dec 5, 2016	-	-	-

If data displays under a link, click on that link to display its recent updates in the **Field History** section.

**Basic Information**

Salutation: -	Gender: Female	SSN: 123456789 <span style="border: 1px solid gray; padding: 2px;">Copy</span>
Last Name: <b>EXAMPLE</b>	Date of Birth: <b>February 1, 1972</b>	Employee ID: <b>123</b>
Middle Name: <b>T</b>	Date of Death: -	Marital Status: <b>Single</b>
First Name: <b>JANE</b>	Age: <b>50 Years, 2 Months</b>	
Suffix: -		

**Additional Information**

Navigate timeline or select date: < 07/01/2003 >

<a href="#">Life Insurance Paid Amount</a>	<a href="#">Retiree Medicare IRMAA/Non-standard Reimbursement Amount</a>	<a href="#">Spouse Medicare IRMAA/Non-standard Reimbursement Amount</a>	<a href="#">Disabled Indicator</a>	<a href="#">Temporary Disabled</a>	
-	-	-	N	Jul 1, 2003	-
<a href="#">Permanent Disabled Indicator</a>	<a href="#">RRS Pension Indicator</a>	<a href="#">Life Insurance Group</a>	<a href="#">Life Insurance Coverage Type</a>	<a href="#">Life Insurance Claim Number</a>	
-	-	-	-	-	-
<a href="#">Ethnicity</a>	<a href="#">Surviving Children Student Flag</a>	<a href="#">Family Link Forfeiture</a>	<a href="#">Medicare Part B DDA Audit</a>	<a href="#">Medicare Pt B DDA Audit Reason</a>	
-	-	-	-	-	-
<a href="#">Preferred Language</a>	<a href="#">Non Payment Indicator</a>	<a href="#">Originating Person ID</a>	<a href="#">Security Type</a>		
-	EG	Jul 1, 2003	-	-	-

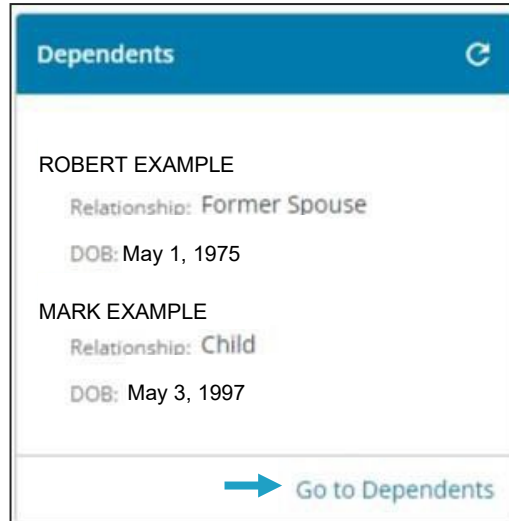
**Field History: Non Payment Indicator**

Value	Effective Date	Entry Date	Source
EG	Jul 1, 2003	Jul 1, 2003	(Process: -, User: -)



### 3.1.2. Dependents Screen

The employee's dependent information is available for display. 1- Click the **Go to Dependents** Link.



The list of dependents displays.

Name	Relationship	DOB ^	Status	Status Effective Date	Enrolled
ROBERT EXAMPLE	Former Domestic Partner	05/01/1975	Eligible Dependent	06/30/2019	No
	Child	05/03/1997	Eligible Dependent	06/30/2019	No

Show inactive dependents:  Yes  No

2- (If more than one dependent displays) click a dependent's name to display the details. The Dependent Information shows.

3- Click the **Contact** link to display the dependent's contact information.

4- Click the **Coverage** link to display the dependent's coverage information

Name: MARK EXAMPLE Relationship: Child DOB: 05/03/1997 Status: Ineligible Dependent Status Effective Date: 02/01/2022 Enrolled: No

Show inactive dependents:  Yes  No

MARK EXAMPLE

Dependent Information **Contact** Coverage

**Basic Information**

Last Name: EXAMPLE Gender: Male SSN: 123456789  
Middle Name: T Date of Birth: May 3, 1997 Also Employee: -  
First Name: MARK Date of Death: -  
Suffix: - Age: 25 Years, 1 Month

**Additional Information**

Dependent Short Term Disability End Date	Dependent Relationship History	Short Term Disabled Dependent Flag	Dependent Status History	Dependent Disabled Indicator
-	Child Jun 30, 2019	No Jun 30, 2019	Ineligible Dependent Feb 1, 2022	No Jun 30, 2019

Dependent Student Status: No Nov 1, 2017

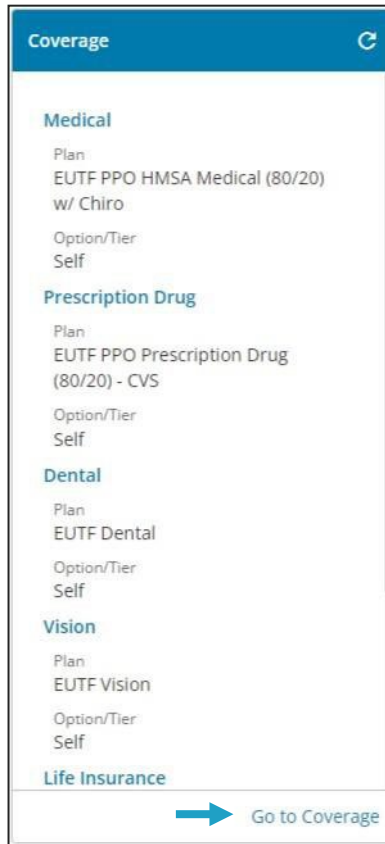
Field History:

Edit

Important Note: The **Edit** option is for EUTF staff only and should not be used by employers.

### 3.1.3. Coverage Screen

The employee's current and historical coverage information is available for display. 1- Click the **Go to Coverage** link.



- 2- The employee's current coverage data displays.
- 3- Scroll down the screen to review all employee and dependent coverage information.

Current		History										
Employee Set			Active									<a href="#">Update Coverage</a>
Medical												
Alert	Org Id	Plan	Option/Tier	Elected Volume	Approved Volume	Event (Effective Date)	Coverage Start Date	Coverage End Date	Total Premium	EE Cost	ER Cost	
-		EUTF PPO HMSA Medical (80/20) w/ Chiro	Self	-	-	<a href="#">Recalc</a> (02/01/2022)	10/01/2014	-	\$277.77	\$111.11	\$166.66	
Prescription Drug												
Alert	Org Id	Plan	Option/Tier	Elected Volume	Approved Volume	Event (Effective Date)	Coverage Start Date	Coverage End Date	Total Premium	EE Cost	ER Cost	
-		EUTF PPO Prescription Drug (80/20) - CVS	Self	-	-	<a href="#">Recalc</a> (02/01/2022)	07/01/2017	-	\$79.55	\$31.82	\$47.73	
Dental												
Alert	Org Id	Plan	Option/Tier	Elected Volume	Approved Volume	Event (Effective Date)	Coverage Start Date	Coverage End Date	Total Premium	EE Cost	ER Cost	
-		EUTF Dental	Self	-	-	<a href="#">Recalc</a> (02/01/2022)	11/01/2017	-	\$18.45	\$7.38	\$11.07	
Vision												
Alert	Org Id	Plan	Option/Tier	Elected Volume	Approved Volume	Event (Effective Date)	Coverage Start Date	Coverage End Date	Total Premium	EE Cost	ER Cost	
-		EUTF Vision	Self	-	-	<a href="#">Recalc</a> (02/01/2022)	11/01/2017	-	\$3.07	\$1.23	\$1.84	
Life Insurance												

- 4- Click the **History** link.
- 5- The employee's complete coverage history shows.


Current **History** ←

Complete History  Specific Date

Medical											
Alert	Plan	Option/Tier	Elected Volume	Approved Volume	Dependents	Event (Effective Date)	Coverage Start Date	Coverage End Date	Total Premium	EE Cost	ER Cost
	EUTF PPO HMSA Medical (80/20) w/ Chiro	Self	--	-	--	<a href="#">Recalc</a> (02/01/2022)	02/01/2022	-	\$277.77	\$111.11	\$166.66
	EUTF PPO HMSA Medical (80/20) w/ Chiro	Self	--	-	--	<a href="#">Conversion</a> (06/30/2019)	06/30/2019	01/31/2022	\$0.00	\$0.00	\$0.00
Prescription Drug											
Alert	Plan	Option/Tier	Elected Volume	Approved Volume	Dependents	Event (Effective Date)	Coverage Start Date	Coverage End Date	Total Premium	EE Cost	ER Cost
	EUTF PPO Prescription Drug (80/20) - CVS	Self	--	-	--	<a href="#">Recalc</a> (02/01/2022)	02/01/2022	-	\$79.55	\$31.82	\$47.73
	EUTF PPO Prescription Drug (80/20) - CVS	Self	--	-	--	<a href="#">Conversion</a> (06/30/2019)	06/30/2019	01/31/2022	\$0.00	\$0.00	\$0.00
Dental											
Alert	Plan	Option/Tier	Elected Volume	Approved Volume	Dependents	Event (Effective Date)	Coverage Start Date	Coverage End Date	Total Premium	EE Cost	ER Cost
	EUTF Dental	Self	--	-	--	<a href="#">Recalc</a> (02/01/2022)	02/01/2022	-	\$18.45	\$7.38	\$11.07
	EUTF Dental	Self	--	-	--	<a href="#">Conversion</a> (06/30/2019)	06/30/2019	01/31/2022	\$0.00	\$0.00	\$0.00
Vision											
Alert	Plan	Option/Tier	Elected Volume	Approved Volume	Dependents	Event (Effective Date)	Coverage Start Date	Coverage End Date	Total Premium	EE Cost	ER Cost


### 3.1.4. Finance Screen

The Finance link displays the employee's Billing screen, same as using the Billing link from the left menu. 1- Click the Go to **Finance** link.

**Finance** 

**Last Payment**  
Date: Jan 1, 2022  
Amount: \$151.54

**Last Adjustment**  
Date: Mar 13, 2022  
Amount: \$303.08

 [Go to Finance](#)

[Home](#) [Transactions](#) [Payments](#) [Credits](#) [Adjustments](#) [ACH](#) [Payment Plans](#)

Group/Entity  
Active Employees /

Latest Activity	Date	Amount
Last Payment	<a href="#">01/01/2022</a>	\$151.54
Last Adjustment	<a href="#">03/13/2022</a>	\$303.08

**Invoice Preferences**

Exclude From Invoicing  
Receive Statement  
Statement Display Salary  
Statement Employee Grouping  
Statement Sort

[Update](#)

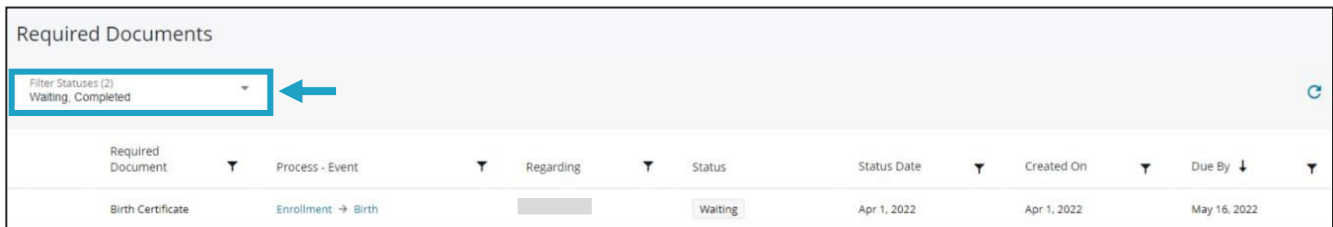
### 3.1.5. Required Document Screen

The Required Documents screen allows the employer to view required documents (e.g.: birth certificates, marriage licenses, divorce decrees), and their submission status as it relates to an employee for the completion of enrollment in plans.

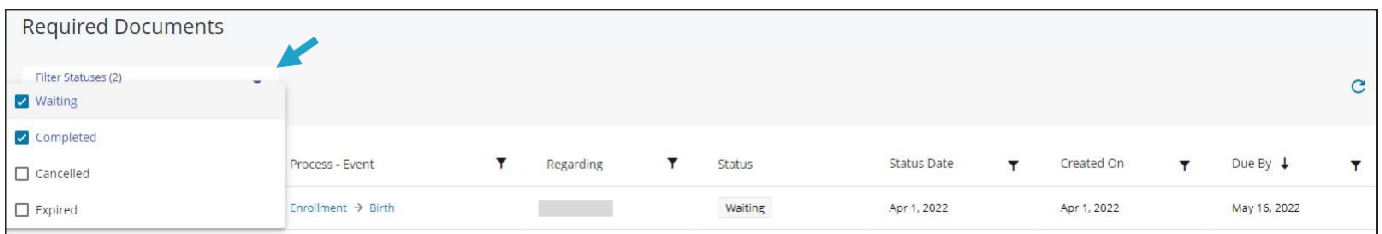
1 - Click the **Go to Required Forms** link.



2 -The **Required Documents** screen displays with the documents with the **Waiting** and **Completed** status.



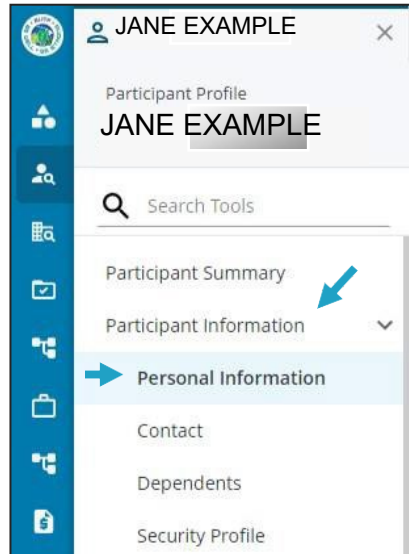
3 - You have the possibility to filter these documents based on their status (**Waiting, Completed, Canceled, Expired**). To do so, click on the drop-down arrow to display the filter list.



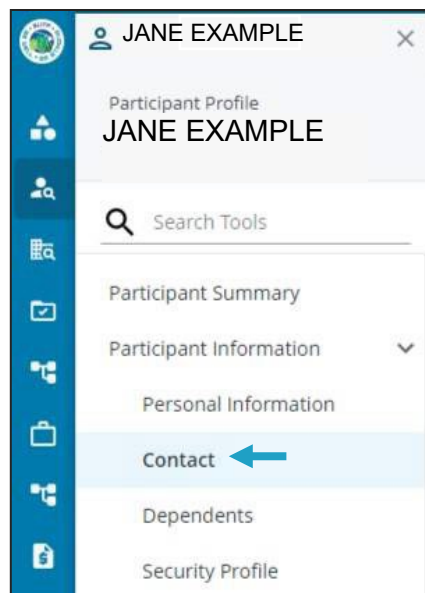
## 3.2. Participant Information

Another way to view more information in the **Participant Profile** is to use the **Participant Information** option on the left menu.

- 1- Click on **Participant Information** on the left menu.
- 2- The menu expands to reveal four subcategories: personal information, contact, dependents, security profile.
- 3- Click on **Personal Information**. The screen displays the same data as the **Profile** option (refer to the section 3.1.1 - Profile Screen)



- 4- Click on **Contact**.

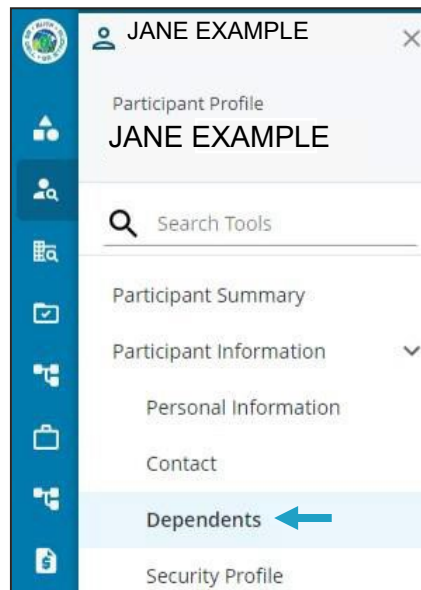


5- The screen displays the same data as the **View Summary** option (refer to the section 3.1.1 - Profile Screen)

Communication Delivery Preferences									
Delivery Type									
Mail									
<b>Address</b> <span style="float: right;">Add Address</span>									
Preferred	Address Type	Effective Date	Address 1	Address 2	City	State	ZIP Code	Country	Action
<input checked="" type="checkbox"/>	Physical	01/01/2001	123 MAIN STREET	-	HONOLULU	HI	96813	US	
<b>E-mail</b> <span style="float: right;">Add E-mail</span>									
No items to display									
<b>Phone</b> <span style="float: right;">Add Phone</span>									
Preferred	Phone Type	Start Date	End Date	Number	Action				
<input type="checkbox"/>	Work	09/17/2009	-	(808) 587-0000					

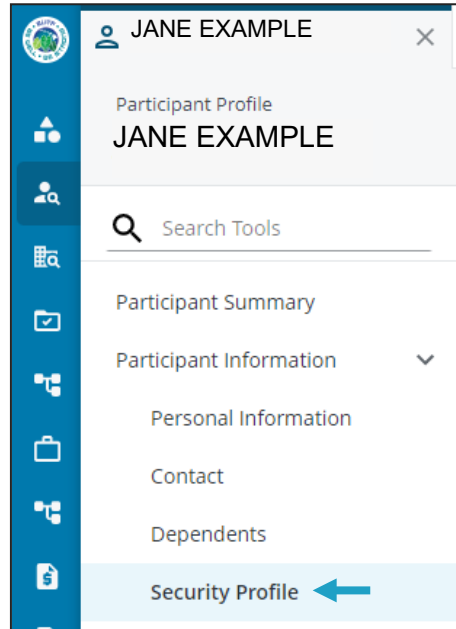
6- Click on **Dependents**.

7- The screen displays the data as the **Dependents** (refer to the section 3.1.2 - Dependents Screen)

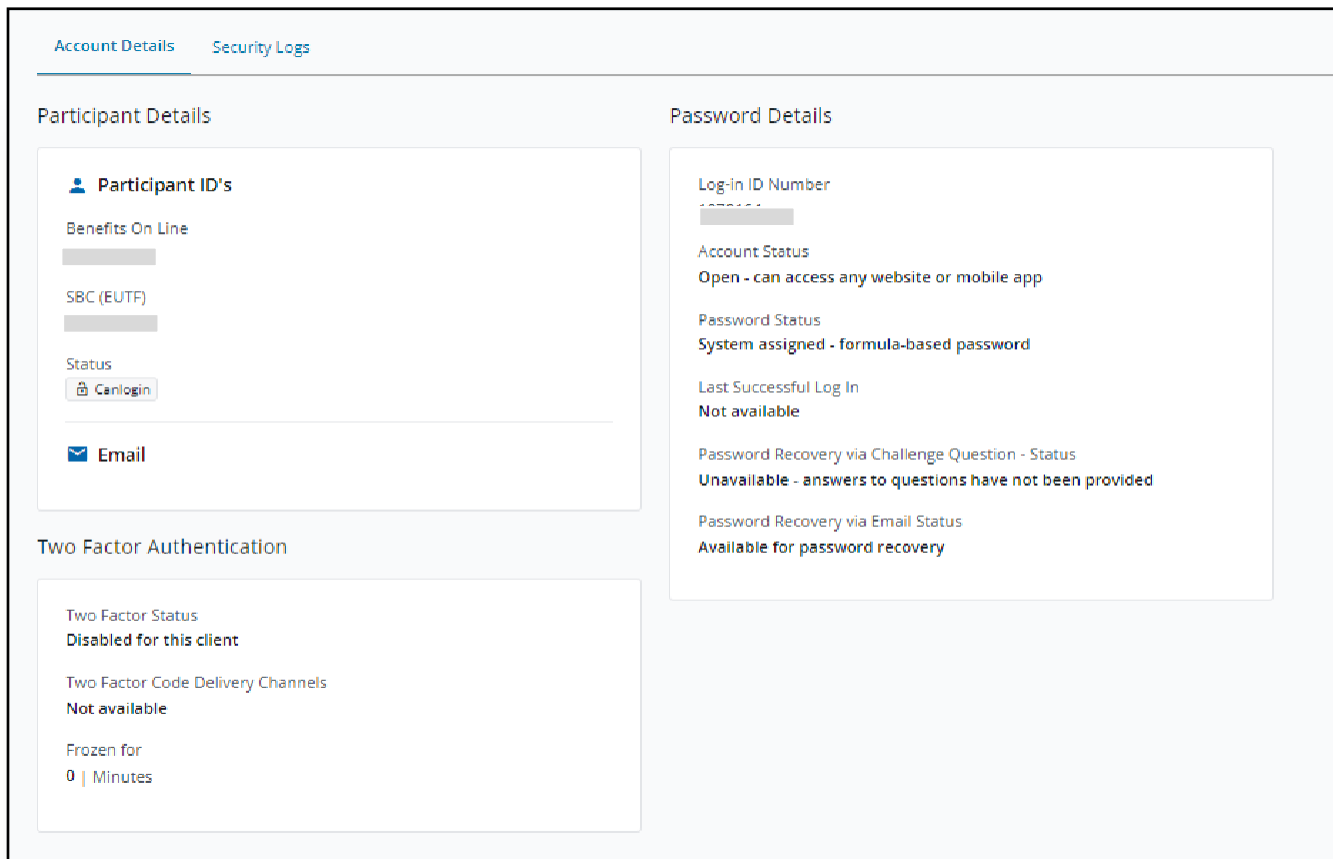




8- Click on **Security Profile**.



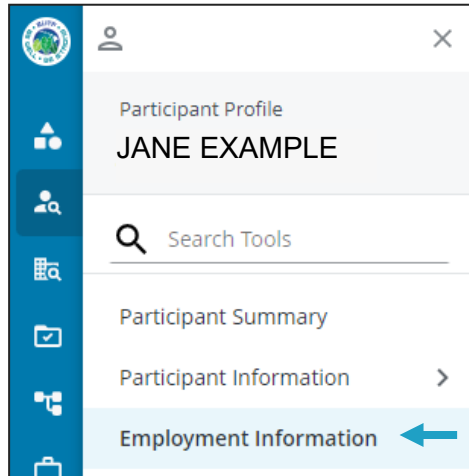
9- The screen displays the data related to the employee's security account.



### 3.3. Employment Information

The Employment Information option provides details about a employee's employment history, employment details, and history for each field.

1- Click **Employment Information** on the left menu.



#### 3.3.1. Employment History

The Employment History section lists the employer and the dates the employee was employed. Each employment is listed on a separate line.

Information in this section includes **Company**, **Company ID**, **Start Date**, **End Date**, and **Status**.

- 1- The **Employment History** and Details screen displays.
- 2- Click on a name in the **Company** column to select it and view the **Employment Details** below.

Employment History				
Company	Company ID	Start Date	End Date	Status
State of Hawaii	STATE	Oct 12, 2017	-	A

### 3.3.2. Employment Details

The Employment Details section displays status for a selected Employment.

Fields include **Billing Location Site, Union Name, EUTF Action Code, Bargaining Unit, Billing Location, and Employment Type Code**

Employment Details: State of Hawaii

Navigate timeline or select date: < 10/12/2017 >

<a href="#">Billing Location Status</a>	<a href="#">Billing Location Status Level 2</a>	Oct 12, 2017	<a href="#">Department Code</a>	Oct 12, 2017	<a href="#">Employment Type Code</a>	Oct 12, 2017	<a href="#">EUTF Action Code</a>	Oct 12, 2017
-	A		H		Active		New Hire	
<a href="#">Kaiser Wellness Awards</a>	<a href="#">Organization Id</a>		<a href="#">Payroll Name</a>	Oct 12, 2017	<a href="#">Retirement Date</a>		<a href="#">Security Level 3</a>	Oct 12, 2017
-	-		06		-		HHSC	
<a href="#">Security Level 4</a>	<a href="#">Security Level 5</a>	Oct 12, 2017	<a href="#">Work Email</a>	Oct 12, 2017	<a href="#">Status</a>	Oct 12, 2017	<a href="#">Agreement</a>	Oct 12, 2017
Kona Community Hospital	NA5		-		Active		Active-PCP Plan	
<a href="#">Bargaining Unit</a>	<a href="#">Union Code</a>	Oct 12, 2017	<a href="#">Union Name</a>	Oct 12, 2017	<a href="#">Termination Reason</a>		<a href="#">Leave Reason</a>	
13	13		HGEA		-		-	
<a href="#">Leave Stop Date</a>	<a href="#">ERS Disability Type</a>		<a href="#">ERS Membership Date</a>		<a href="#">Months Of Service</a>		<a href="#">Years Of Service</a>	
-	-		-		-		-	
<a href="#">Warrant Distribution Code</a>	<a href="#">Billing Location</a>	Oct 12, 2017	<a href="#">Billing Location Site</a>	Oct 12, 2017	<a href="#">Kaiser Out-of-State Monthly Cap</a>			
136	Kona Hospital		State of Hawaii		-		-	

- 1- To view the employment details for a specific date, click the calendar icon in the **Navigate timeline or select date** field, and select the specific date.

Employment Details: State of Hawaii

Navigate timeline or select date: < 10/12/2017 >

<a href="#">Billing Location Status</a>	<a href="#">Department Code</a>	Oct 12, 2017	<a href="#">Employment Type Code</a>	Oct 12, 2017	<a href="#">EUTF Action Code</a>	Oct 12, 2017
-	H		Active		New Hire	
<a href="#">Kaiser Wellness Awards</a>	<a href="#">Payroll Name</a>	Oct 12, 2017	<a href="#">Retirement Date</a>		<a href="#">Security Level 3</a>	Oct 12, 2017
-	06		-		HHSC	
<a href="#">Security Level 4</a>	<a href="#">Work Email</a>	Oct 12, 2017	<a href="#">Status</a>	Oct 12, 2017	<a href="#">Agreement</a>	Oct 12, 2017
Kona Community Hospital	-		Active		Active-PCP Plan	
<a href="#">Bargaining Unit</a>	<a href="#">Union Name</a>	Oct 12, 2017	<a href="#">Termination Reason</a>		<a href="#">Leave Reason</a>	
13	HGEA		-		-	
<a href="#">Leave Stop Date</a>	<a href="#">ERS Membership Date</a>		<a href="#">Months Of Service</a>		<a href="#">Years Of Service</a>	
-	-		-		-	
<a href="#">Warrant Distribution Code</a>	<a href="#">Billing Location</a>	Oct 12, 2017	<a href="#">Billing Location Site</a>	Oct 12, 2017	<a href="#">Kaiser Out-of-State Monthly Cap</a>	
136	Kona Hospital		State of Hawaii		-	

### 3.3.3. Field History

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 (Billing Location Site used in this example) to view its history details below.

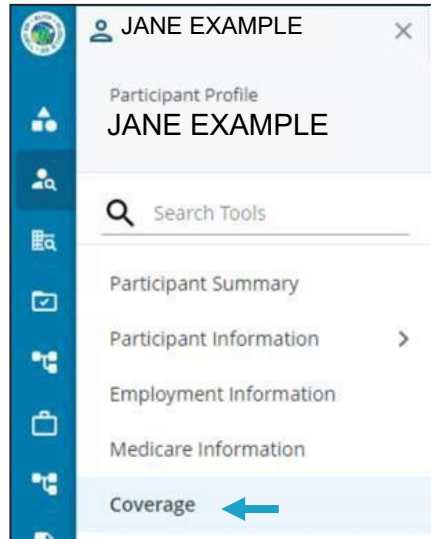
Field History: Billing Location Site

Value	Effective Date	Entry Date	Source
01	Oct 12, 2017	Oct 12, 2017	(Process: -, User: -)

### 3.4. Coverage

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

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



The Coverage screen organizes the employee's and any dependent's coverage information under **Current** and **History** tabs.

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

Current		History									
Employee Set Active											
Medical <span style="float: right;">▼</span>											
Alert	Org Id	Plan	Option/Tier	Elected Volume	Approved Volume	Event (Effective Date)	Coverage Start Date	Coverage End Date	Total Premium	EE Cost	ER Cost
-		EUTF HMO HMSA Medical w/ Chiro	Family	-	-	<a href="#">Recalc</a> (05/01/2022)	02/01/2010	-	\$1,174.70	\$636.38	\$538.32
Prescription Drug <span style="float: right;">▼</span>											
Alert	Org Id	Plan	Option/Tier	Elected Volume	Approved Volume	Event (Effective Date)	Coverage Start Date	Coverage End Date	Total Premium	EE Cost	ER Cost
-		EUTF HMO Prescription Drug	Family	-	-	<a href="#">Recalc</a> (05/01/2022)	05/01/2012	-	\$246.27	\$133.41	\$112.86
Dental <span style="float: right;">▼</span>											
Alert	Org Id	Plan	Option/Tier	Elected Volume	Approved Volume	Event (Effective Date)	Coverage Start Date	Coverage End Date	Total Premium	EE Cost	ER Cost
-		EUTF Dental	Family	-	-	<a href="#">Recalc</a> (05/01/2022)	07/01/2003	-	\$60.66	\$24.96	\$35.70
Vision <span style="float: right;">▼</span>											
Alert	Org Id	Plan	Option/Tier	Elected Volume	Approved Volume	Event (Effective Date)	Coverage Start Date	Coverage End Date	Total Premium	EE Cost	ER Cost
-		EUTF Vision	Family	-	-	<a href="#">Recalc</a> (05/01/2022)	07/01/2003	-	\$7.46	\$2.99	\$4.47

### 3.4.1. Current Tab

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

- **Alert** – indicates by an arrow the future dated coverages for the employee. It is a reminder to look at the History tab to view the future dated election/cost.
- **Org Id** – indicates the Organization ID for which the employee is employed
- **Plan** – indicates the plan/option for benefits for which the employee is enrolled. For example: EUTF PPO HMSA 75/25, EUTF Kaiser Standard, EUTF dental, etc.
- **Option/Tier** – indicates the plan option for which the employee is enrolled. For example: Self, Two Party, Family.
- **Elected/Approved Volume (Life benefit only)** – indicates the dollar value the employee has for life benefits For EUTF, Elected and Approved Volumes always show the same amount.
- **Event (Effective Date)** – indicates the effective date of the change entered by the event
- **Coverage Start Date** – indicates the date coverage will, or did, begin
- **Coverage End Date** – indicates the date coverage is end dated
- **Total Premium** – total of EE Cost and ER cost per benefit (per pay-period)
- **EE Cost** – Employee cost per benefit (per pay-period)
- **ER Cost** – Employer cost per benefit (per pay-period)
- **Totals** (bottom of table) – Total premium and costs for all benefits (per pay-period)

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

### 3.4.2. History Tab

The History tab shows the employee's previous coverages. You have the possibility to view the entire history (default) or select a date to see coverages in effect on that date.

Current		History										
<input checked="" type="radio"/> Complete History <input type="radio"/> Specific Date												
Medical <span style="float: right;">▼</span>												
Alert	Plan	Option/Tier	Elected Volume	Approved Volume	Dependents	Event (Effective Date)	Coverage Start Date	Coverage End Date	Total Premium	EE Cost	ER Cost	
	EUTF HMO Kaiser Comprehensive Medical (Including Rx) w/ Chiro	Self	-	-	-	<a href="#">Recalc</a> (02/01/2022)	02/01/2022	-	\$361.09	\$146.70	\$214.39	
	EUTF HMO Kaiser Comprehensive Medical (Including Rx) w/ Chiro	Self	-	-	-	<a href="#">Conversion</a> (06/30/2019)	06/30/2019	01/31/2022	\$0.00	\$0.00	\$0.00	
Prescription Drug <span style="float: right;">▼</span>												
Alert	Plan	Option/Tier	Elected Volume	Approved Volume	Dependents	Event (Effective Date)	Coverage Start Date	Coverage End Date	Total Premium	EE Cost	ER Cost	
	No Coverage	No Coverage	-	-	-	<a href="#">Recalc</a> (02/01/2022)	02/01/2022	-	\$0.00	\$0.00	\$0.00	
	No Coverage	No Coverage	-	-	-	<a href="#">Conversion</a> (06/30/2019)	06/30/2019	01/31/2022	\$0.00	\$0.00	\$0.00	
Dental <span style="float: right;">▼</span>												
Alert	Plan	Option/Tier	Elected Volume	Approved Volume	Dependents	Event (Effective Date)	Coverage Start Date	Coverage End Date	Total Premium	EE Cost	ER Cost	
	EUTF Dental	Self	-	-	-	<a href="#">Recalc</a> (02/01/2022)	02/01/2022	-	\$18.45	\$7.38	\$11.07	
	EUTF Dental	Self	-	-	-	<a href="#">Conversion</a> (06/30/2019)	06/30/2019	01/31/2022	\$0.00	\$0.00	\$0.00	
Vision <span style="float: right;">▼</span>												
Alert	Plan	Option/Tier	Elected Volume	Approved Volume	Dependents	Event (Effective Date)	Coverage Start Date	Coverage End Date	Total Premium	EE Cost	ER Cost	

## 3.5. Enrollment History

The Enrollment History screen allows you to view events initiated on the employee and the status.

1. Click on **Enrollment History** from the left menu.
2. A list of all events will display dating back to 1/1/2019 will display along with the status.

Participant Summary			
Participant Information	>		
Employment Information			
Medicare Information			
Coverage			
<b>Enrollment History</b>	←		
Participant Workflow			
Communications	>		
Log History			

Status	Event	Effective Date
Processed	Active Open Enrollment	07/01/2023
Processed	Birth	03/30/2023
Defaulted	Active Open Enrollment	07/01/2022
Processed	Recalc	05/01/2022
Processed	Conversion	04/16/2021
Processed	Conversion	07/01/2019
Processed	Conversion	01/01/2019

### Status legend

**Processed:** The event has been completely processed, transmitted to the health benefit carriers, and payroll effectuated.

**Completed:** The event selections have been made, but the event is not completely processed. The enrollment changes have not yet been transmitted to the health benefit carriers and payroll has not been effectuated. Please contact the EUTF for assistance.

**Pending Approval:** The event has been completed by the employee or EUTF, but required documents have either not been uploaded/received or not yet reviewed/approved by EUTF.

**In Progress:** The event has been initiated by EUTF or the employee, but selections have not yet been finalized.

**Defaulted:** No elections were made through the event and the employee was defaulted into coverage (generally, this occurs with Open Enrollment and the employee is defaulted into their existing coverage).

**Recalc:** All employees who existed in the BAS as of 5/1/2022 have a 5/1/2022 recalc, which was the go-live date in the BAS. Employees may have recalcs or rate recalcs as of other dates, which indicate an EUTF administrative action.

**Conversion:** Indicate an event prior to 5/1/2022 that was processed in the previous BAS.

3. Click on the event name under **Event**.
4. The **Event History** window opens below, displaying

information on the event status and coverage elected through this event.

Event History				
Status	Coverage			
Employee Set: active				
Status	Date	User	Process	Reference
Processed	Mar 7, 2022 11:49:24 AM	Administrator (Duane Questel)	reverseBenefitEventBatch	374158
Processed	Mar 4, 2022 8:17:39 PM	Administrator (Duane Questel)	convRecalcEventCloseProcess	374158
Processed	Mar 2, 2022 5:18:18 AM	Administrator (Duane Questel)	convRecalcEventCloseProcess	372693
Processed	Mar 11, 2022 8:11:57 PM	Administrator (Duane Questel)	convRecalcEventCloseProcess	374756
Processed	Mar 3, 2022 3:30:24 PM	Administrator (Duane Questel)	reverseBenefitEventBatch	372693
Processed	Mar 8, 2022 2:01:27 PM	Administrator (Duane Questel)	convRecalcEventCloseProcess	374396
Processed	Mar 11, 2022 2:21:11 PM	Administrator (Duane Questel)	reverseBenefitEventBatch	374396







### 3.6. Communications

The Communications screens allow you to view outgoing (BAS generated) and incoming documents.





5. Click on **Communications** from the left menu.
6. **Incoming Documents** will open and display all documents uploaded through the Member Portal or scanned into the member's file by EUTF. Click on the page icon to open a PDF of the document.

Participant Summary
Participant Information >
Employment Information
Medicare Information
Coverage
Enrollment History
Participant Workflow
Communications v
<b>Incoming Documents</b> ←
Outgoing Documents
Required Documents
Log History

	Document Name	Tracking ID
>  ←	Birth Certificate	5505154961
> 	Birth Certificate	5505154978
> 	Student Verification	5505181913
> 	Event-Open Enrollment (EE)	5505145900

7. Select **Outgoing Documents** to view documents generated by the system. Click on the dropdown arrow to display all document versions associated with an event. Click on the page icon to open a PDF of the document.

Communications v
Incoming Documents
<b>Outgoing Documents</b> ←
Required Documents

	Document Name	Process - Event
v ←  ⋮	studentCertNtc	Outbound Communication → Student Initial Certification
>  ←	EUTF-Student Certification Notice	
v  ⋮	confirmationStatement	Election and Enrollment → Active Open Enrollment
> 	Benefit Enrollment Confirmation Statement	