West Virginia Public Employees Insurance Agency

Employer Portal

April 2026

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1 Preface

1.1 Purpose of this Document

The purpose of this document is to show how to accomplish various tasks relating to user access and management in the Employer Portal of the TELUS Health system.

1.2 Format

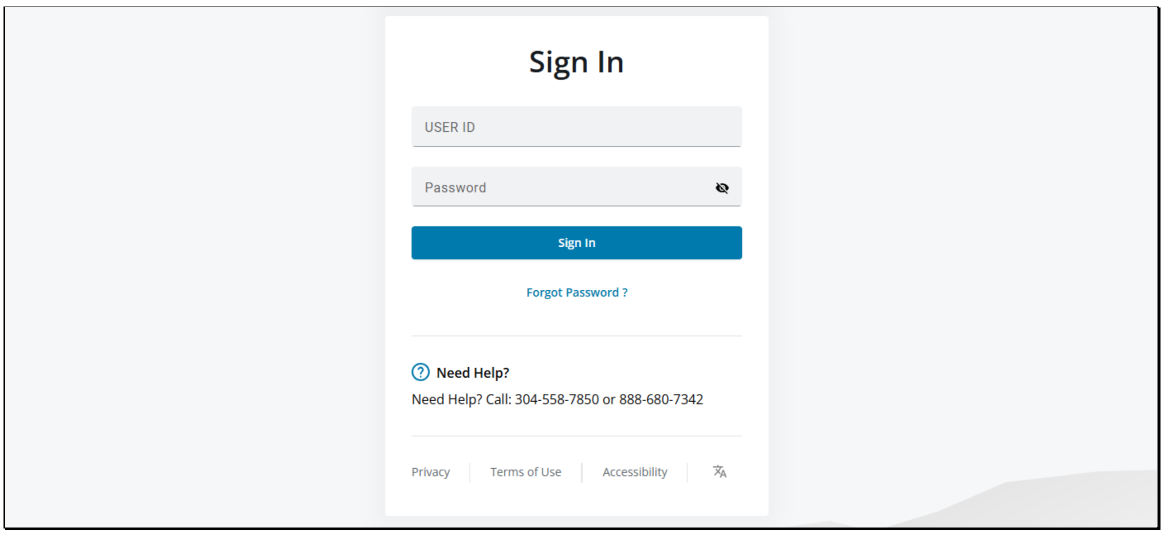
Examples are presented in a step by step approach. PEIA screens continue to change throughout the UAT period, therefore, many of the screenshots in this guide may not reflect the current testing environment. Style, colors, and order of content on menus are subject to change.

2 Employer Portal Configuration

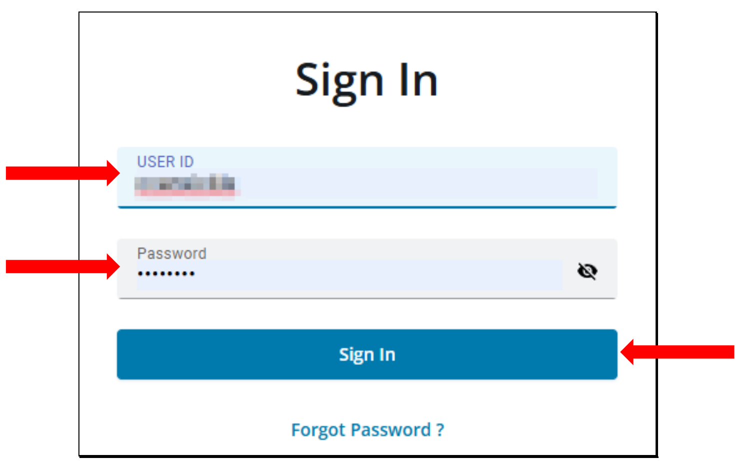
2.1 Employer Portal Login

TELUS Health will create all employer administrative users. You will receive an email with your login name and initial password.

1. Go to **https://wvpeiaemp-dashboard.uat.hroffice.com/tools/admin-login/HARMONYEMP/login** to access the login page.

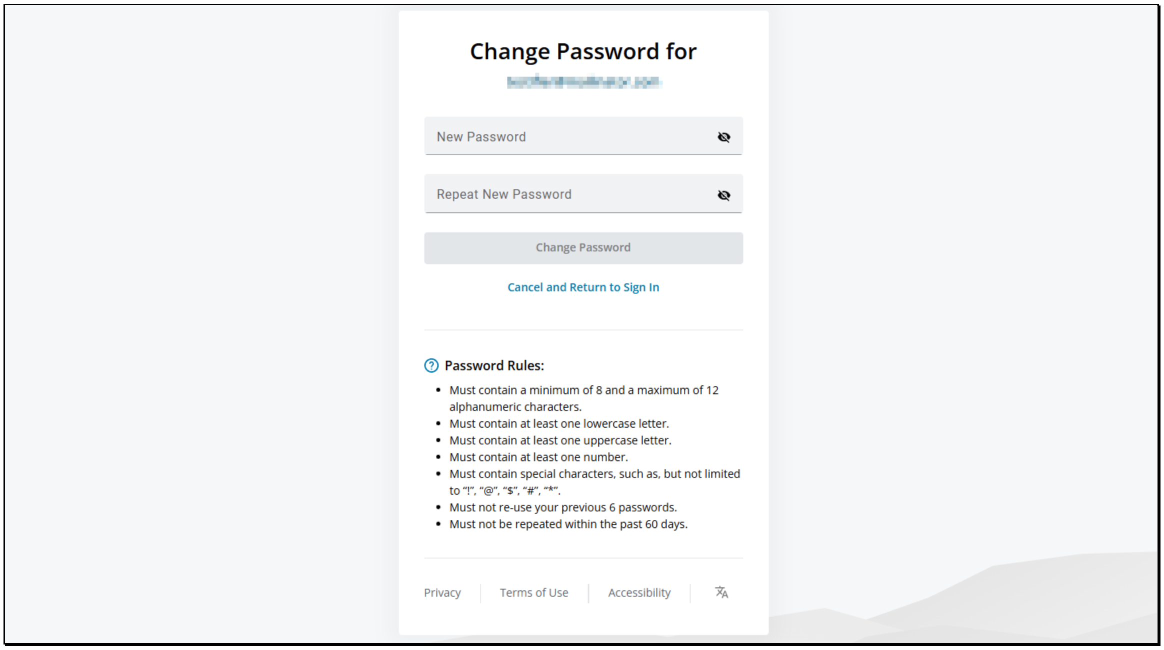


2. Type the username you received in the email in the **User ID** field.
3. Type the password you received in the email in the **Password** field.



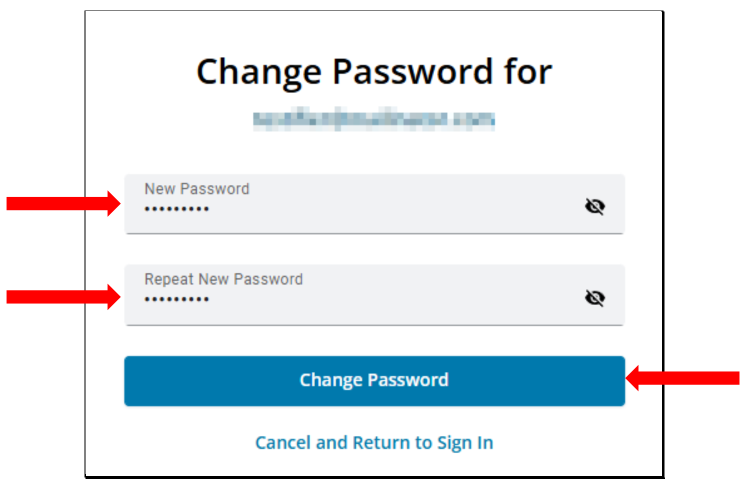
4. Click the **Sign In** button.
   Upon first login, you will be prompted to reset your password.

2.1.1 Change Password on First Login

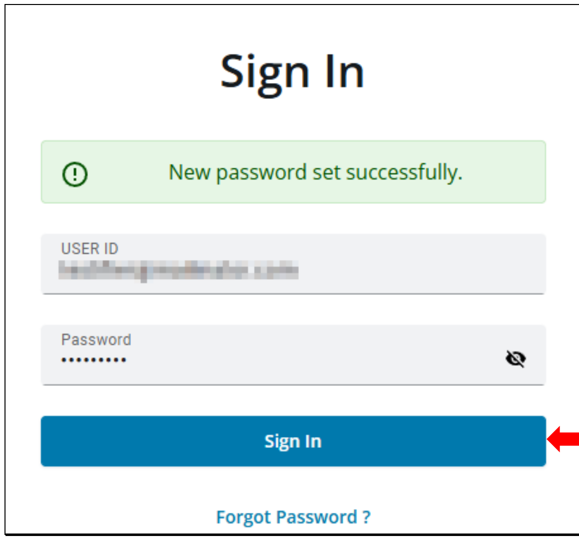


5. Type a new password in the **New Password** field.
   Follow the rules displayed under **Password Rules**.

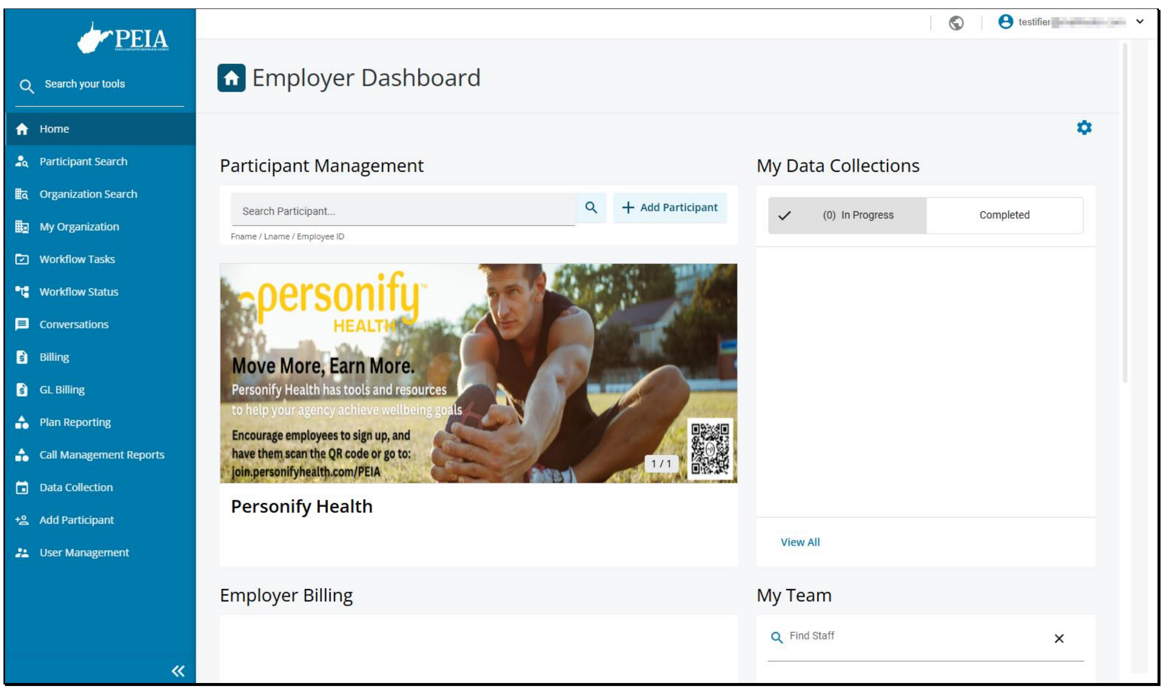
6. Type the new password again in the **Repeat New Password** field.



7. Click the **Change Password** button.
   The system confirms the password change,

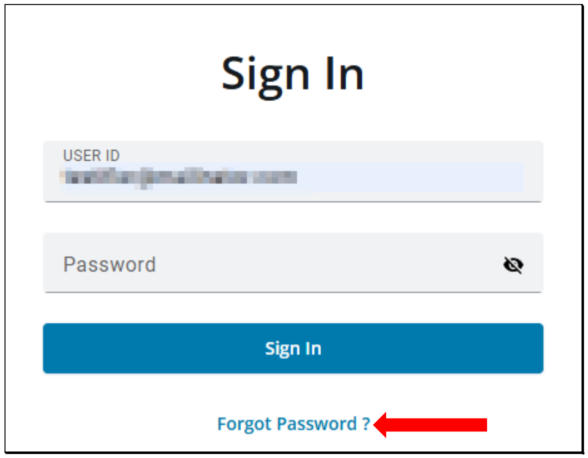


8. Click the **Sign In** button again.
   The Employer Dashboard (Home) screen displays.

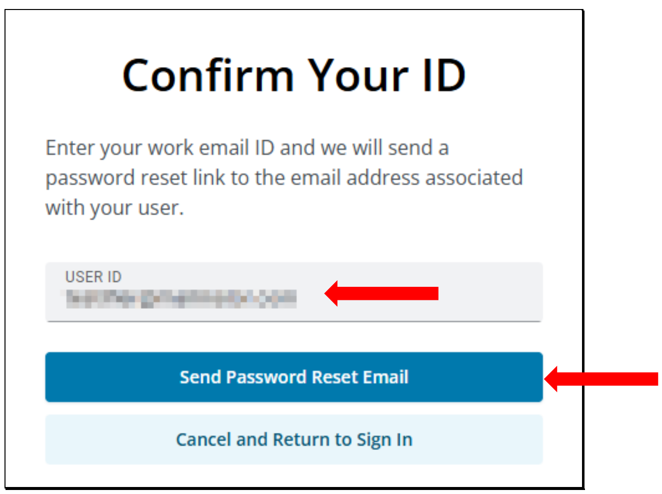


2.1.2 Forgotten Password Recovery

Follow these steps if you forget your login password:



1. Click the **Forgot Password?** link.
   The Confirm Your ID window displays

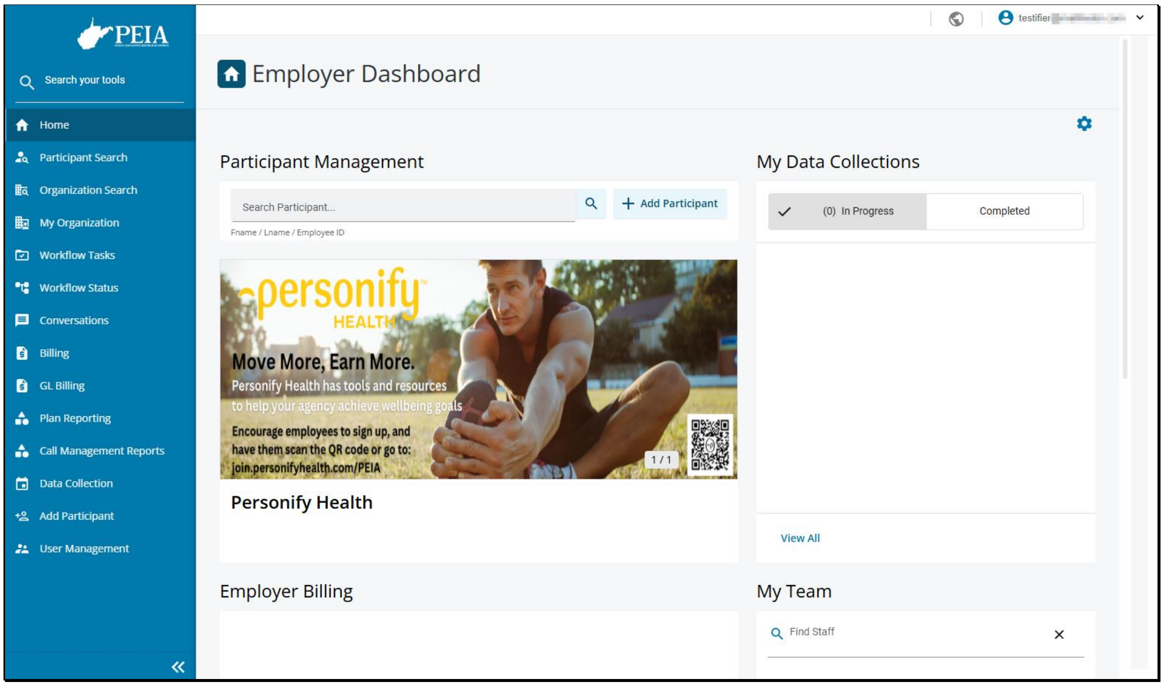


2. Type your login ID name in the **User ID** field.
3. Click the **Send Password Reset Email** button.
   The system sends an email with reset instructions to the email address on file for you.
4. Follow the instructions in the email to complete the reset process.

2.2 Employer Dashboard

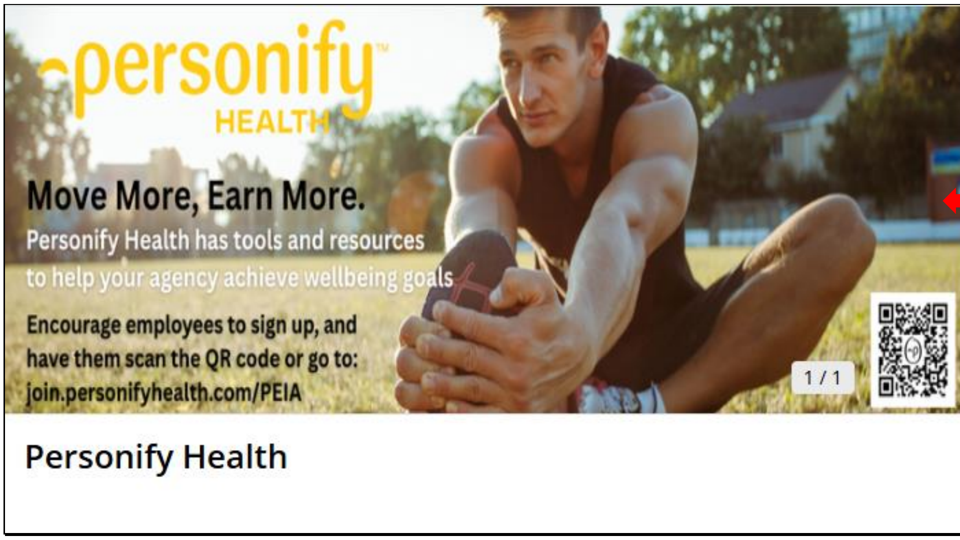
At the left of the Employer Dashboard screen is a blue menu of commands, usually referred to as the **left navigation menu**. Many of these left navigation menu commands will be referenced throughout this guide. The options you see in the left navigation menu will vary based on your employer portal access level.

The Employer Dashboard screen also contains multiple small sections, sometimes referred to as *widgets*. Widgets are tools that provide immediate access to many of the functions contained in the left navigation menu.

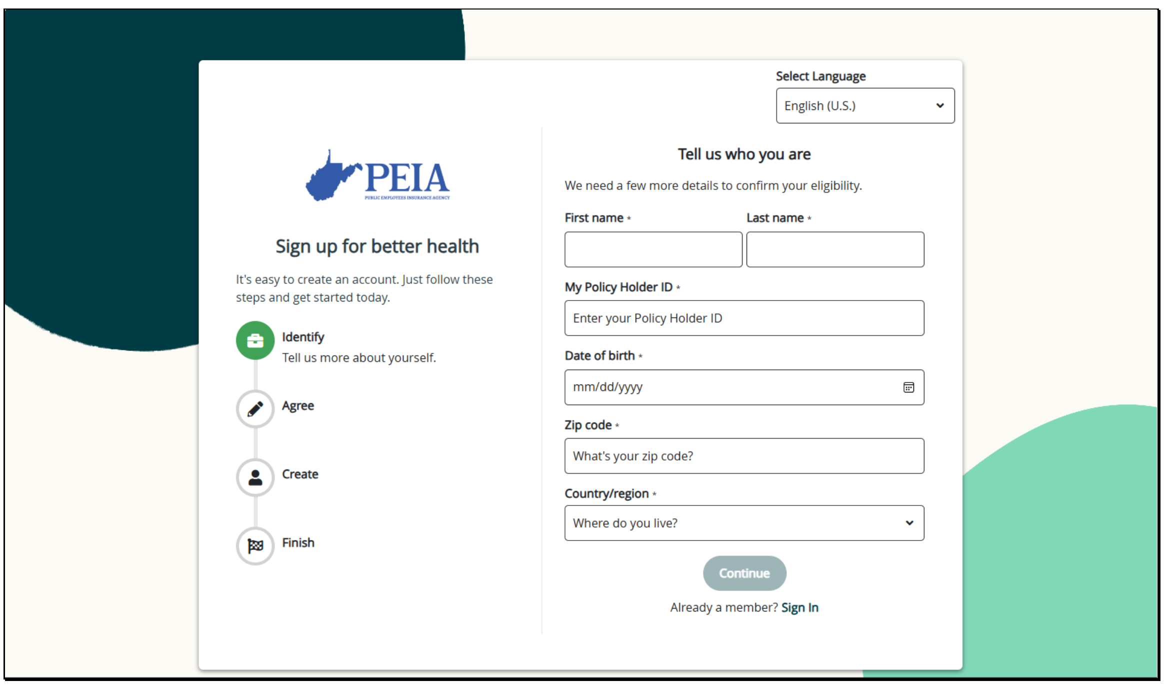


Personify Health

PEIA provides the **Personify Health** resource, which allows employers to sign up for health benefits.

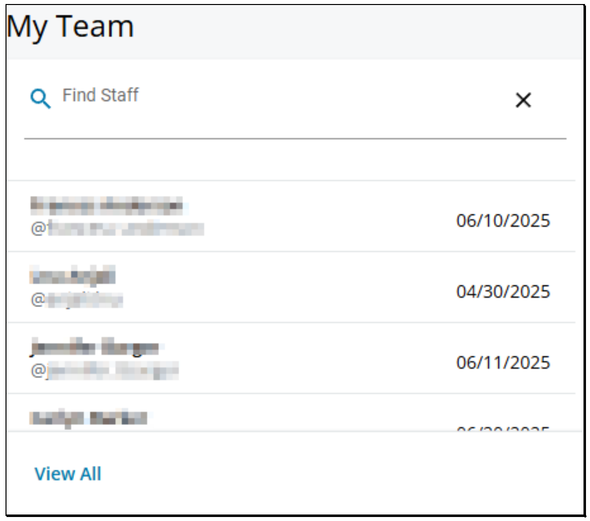


1. Click directly on the picture to open a new browser tab for the Personify Health web page.



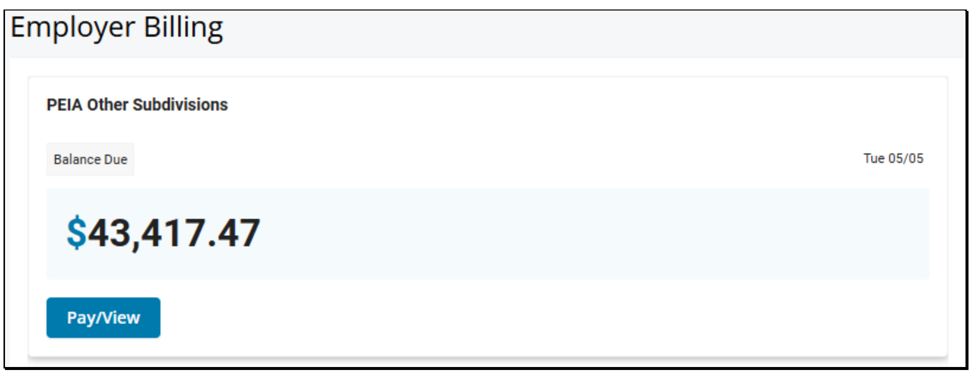
2. When finished, close the new browser tab to return to the Employer Dashboard screen.

My Team



The My Team widget displays the personnel that are set up as administrative users for the portal. These users are established with the **User Management** functionality in the Administrator Portal.

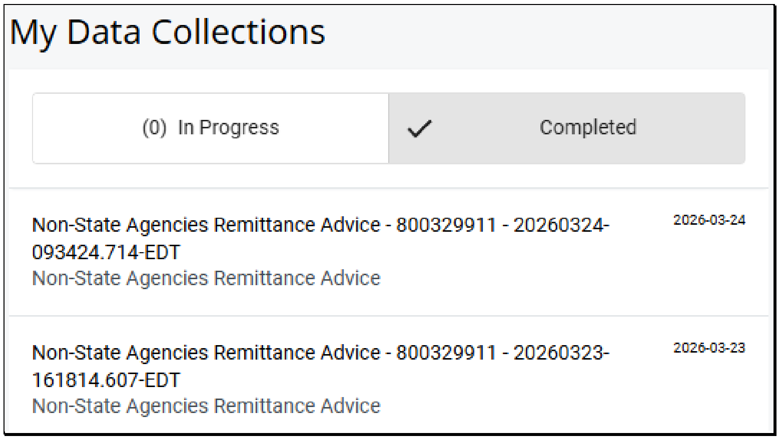
Employer Billing



Employer Billing controls the billing functionality for your organization. Billing may be launched from a member's profile also.

Functionality of Employer Billing will be covered in the West Virginia Public Employees Insurance Agency Employer Portal – Billing training guide.

My Data Collections



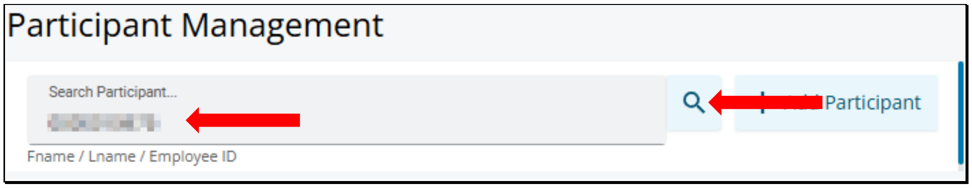
You will use the Data Collection function to upload a file of all your organization's payroll deductions. This will create payments and adjustments for any affected employees.

Functionality of Data Collection will be covered in the West Virginia Public Employees Insurance Agency Employer Portal – Billing training guide.

3 Participant Management

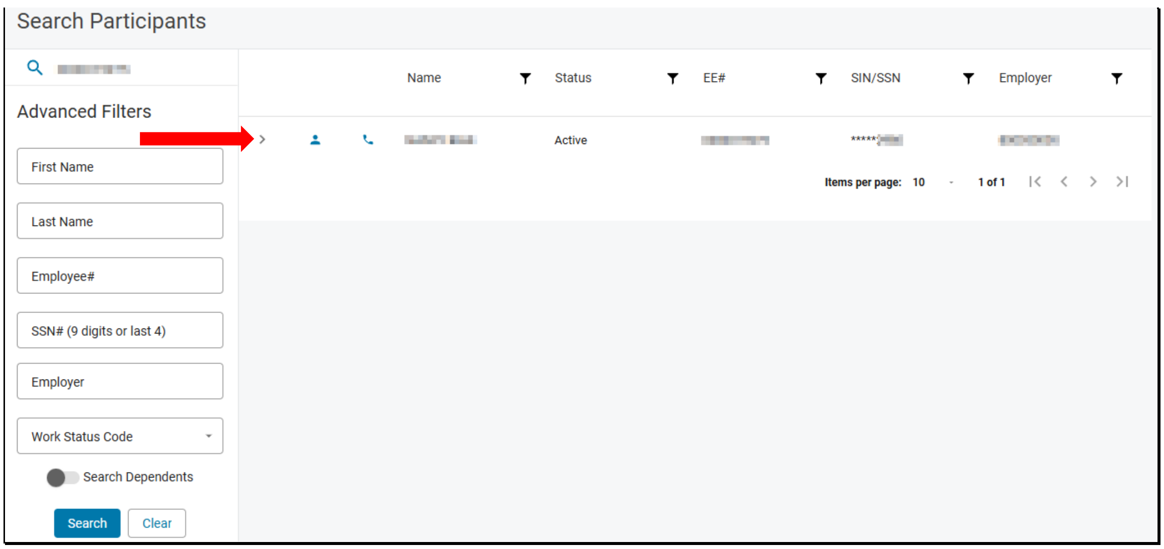
3.1 Participant Search

To view or update workers in your organization, use the **Participant Search** function.



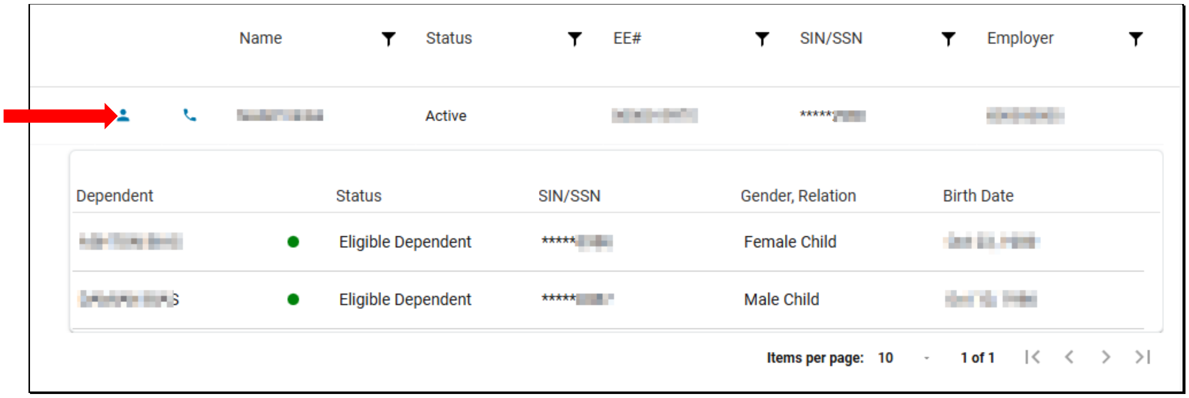
1. Type a participant's Employee ID number into the **Search Participant** field.
   First name and last name of a participant may be used as search criteria also.

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

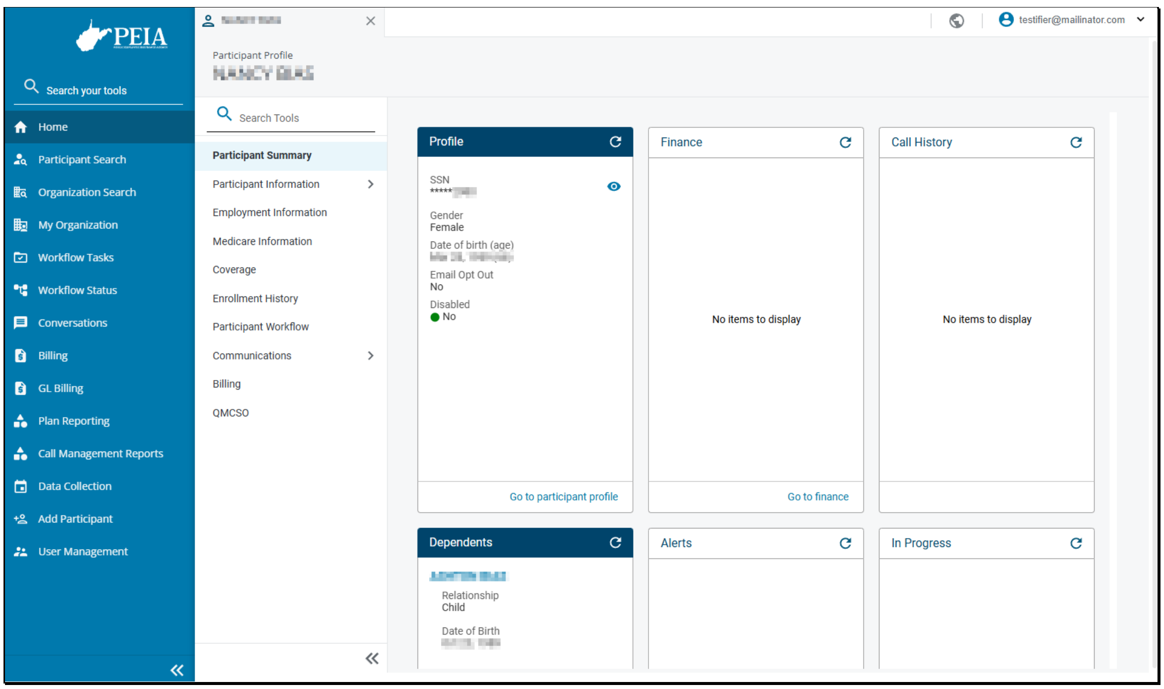


Participants who match the search criteria are displayed. The participant is indicated with a silhouette icon. An arrow icon indicates that the participant has dependents.

3. Click the **arrow icon**.
   The list of dependents displays.

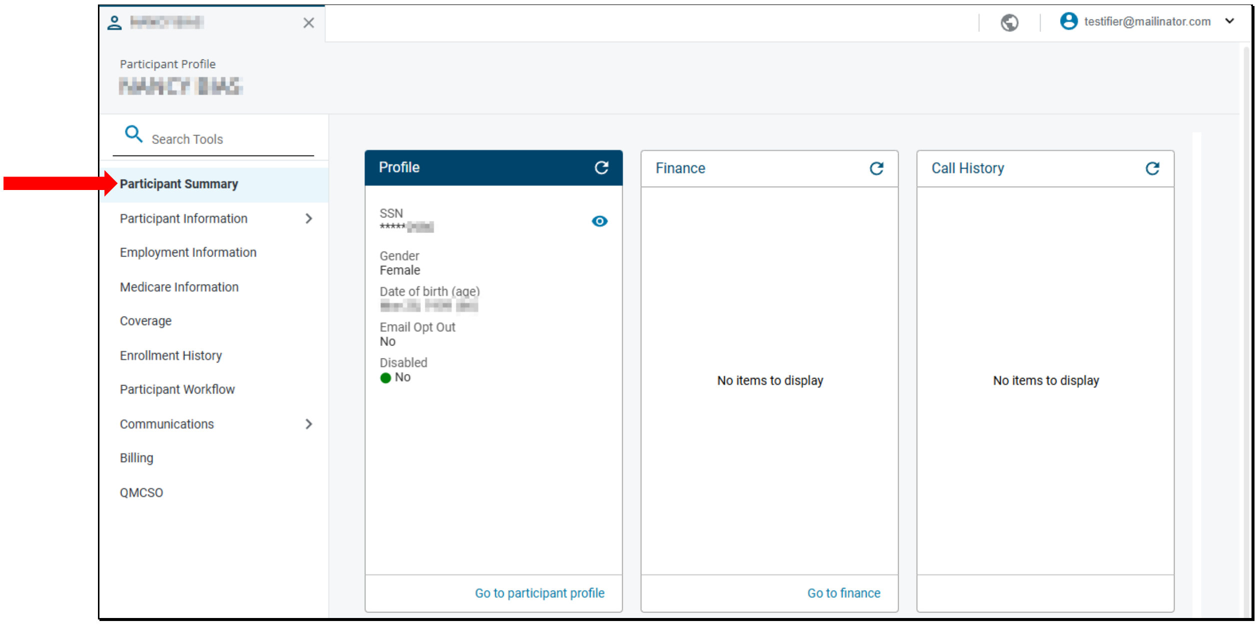


4. Click the **silhouette** icon to access the participant's data.
   The Participant Profile screen displays.

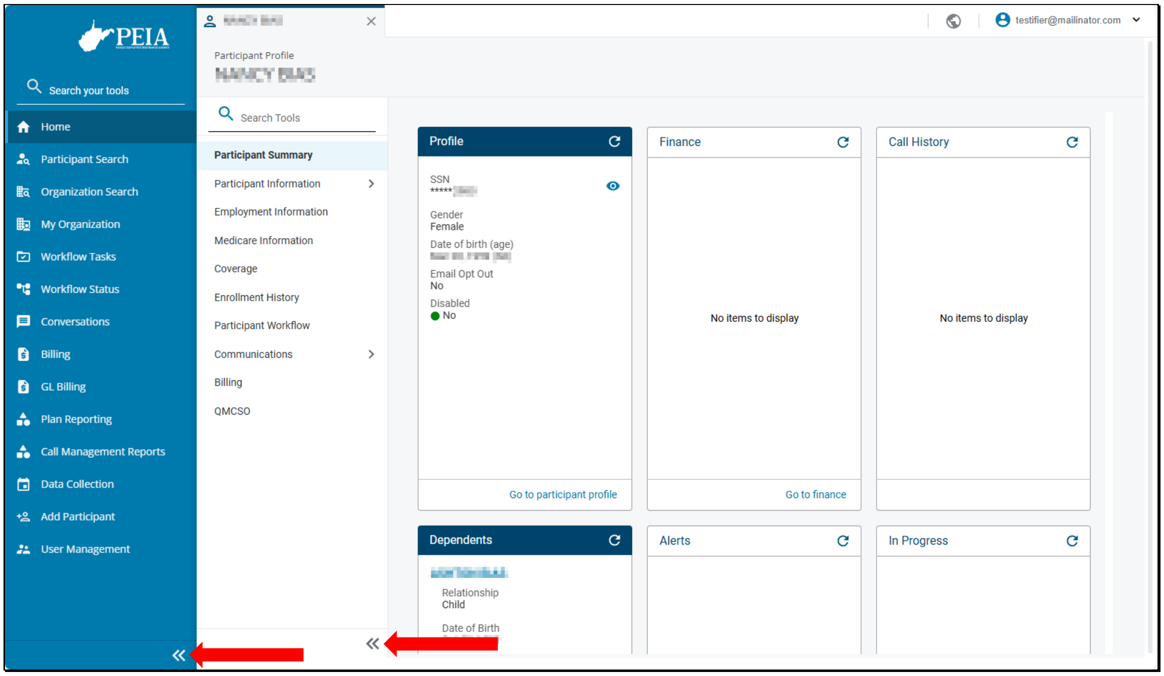


Note that the name of the selected participant appears in a tab at the top of the screen.

This screen is also called the **Participant Summary**, as this command is highlighted on a new menu that displays. This menu may be called the **participant navigation menu**.

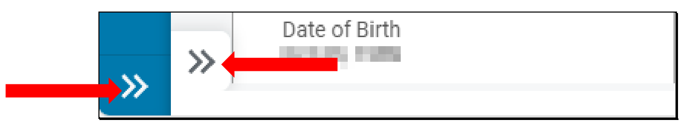


3.1.1 Collapse and Expand Menu Panels



Note the double left arrows, or *chevrons*, at the bottoms of the menu panels.

1. Click the two chevrons to **collapse** each panel.
   The left navigation menu chevron is replaced by a right chevron; the participant navigation chevron is replaced by a right chevron appears.



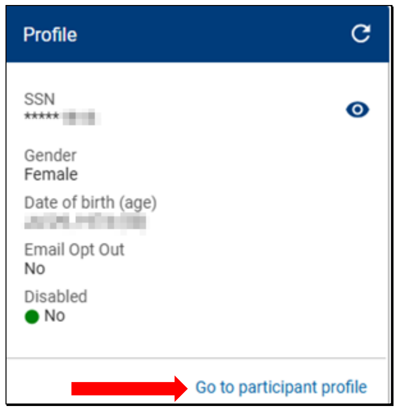
2. Click the right chevrons to **expand** each panel again.

3.2 Exploring the Participant Profile

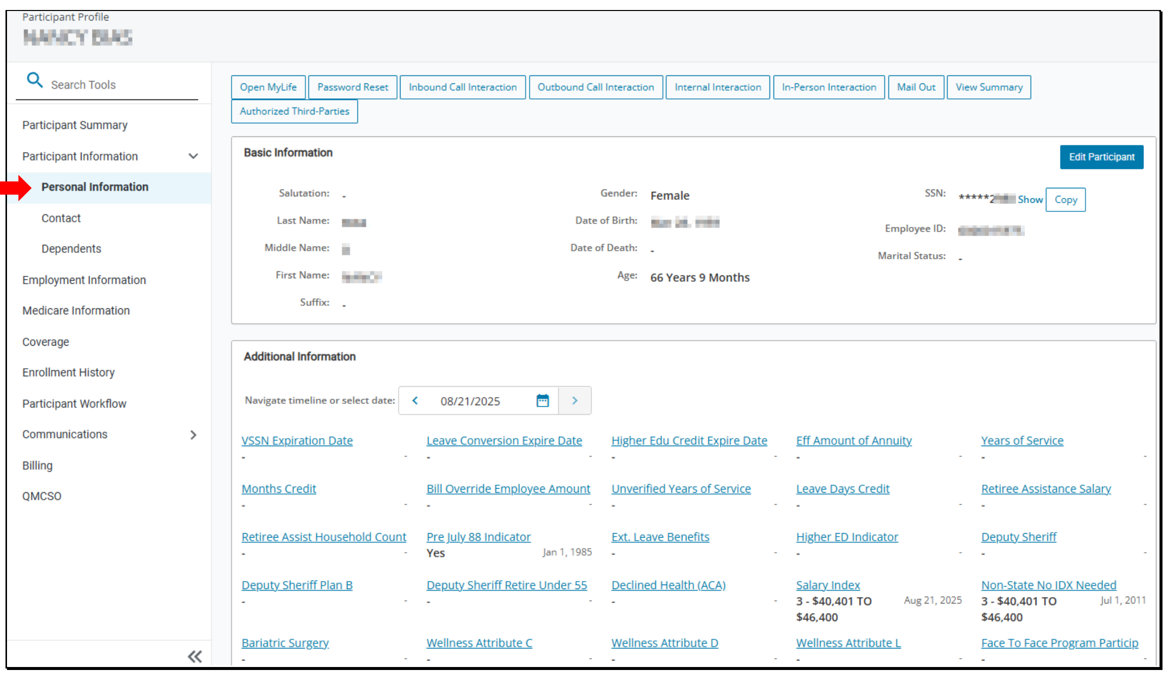
The Participant Profile (also known as the Participant Summary) screen contains widgets of its own. Each of these provides a snapshot of the participant's information on file, including sections for **Profile**, **Dependents**, **Coverage**, and **Finance**. Click the link at the bottom of each widget to open its display.

3.2.1 Profile

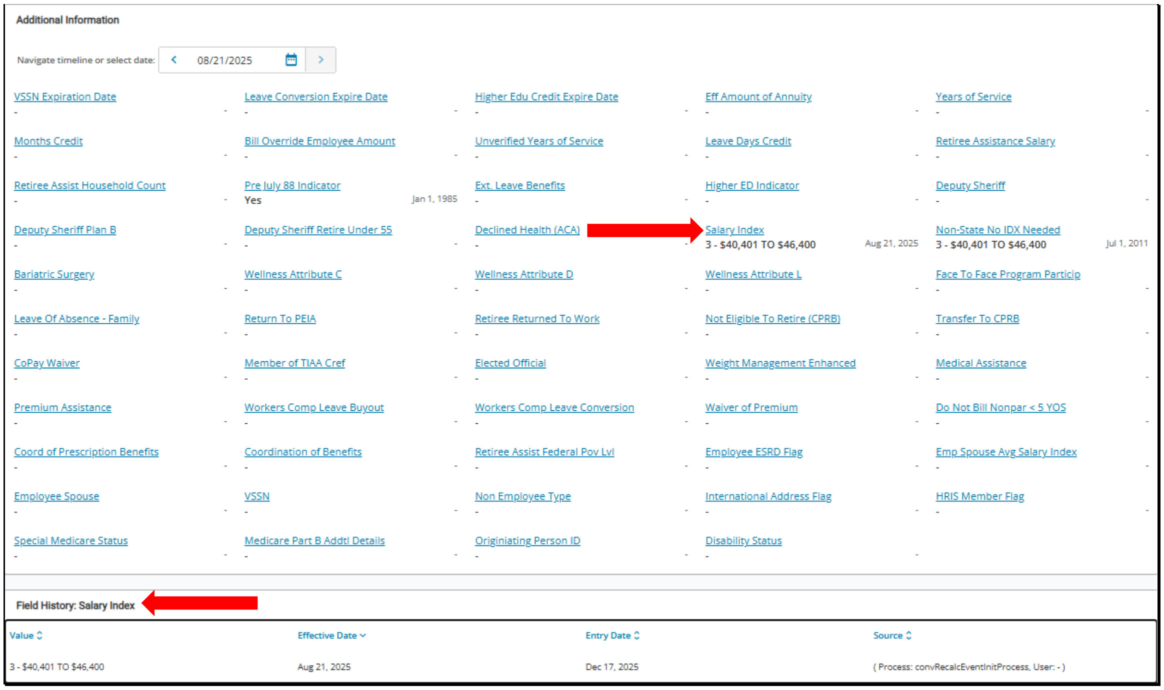
The Profile Screen displays Basic and Additional Information for the selected participant.



1. Click the **Go to Participant Profile** link.
   The Personal Information screen displays (as identified by the highlight on the participant navigation menu).

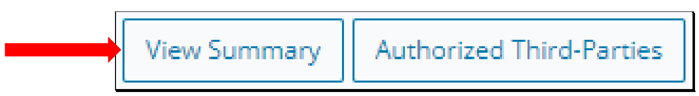


2. Scroll down to view the **Additional Information** section.

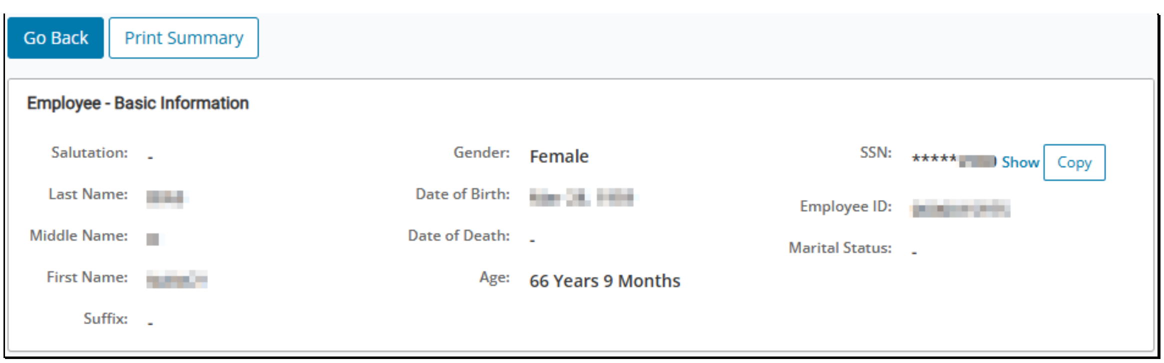


3. (If data displays for a link) click a link to display its updates in the **Field History** section.
   Field History shows the date of the change and value that was entered on that date.

Note the row of buttons at the top of the Profile screen. The **Summary** screen displays detailed demographic information for the selected participant. Scroll down this screen to show Employment Information, Coverage, Dependent, and Beneficiary details too.



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



Employee - Additional Information

VSSN Expiration Date -	Leave Conversion Expire Date -	Higher Edu Credit Expire Date -	Eff Amount of Annuity -
Years of Service -	Months Credit -	Bill Override Employee Amount -	Unverified Years of Service -
Leave Days Credit -	Retiree Assistance Salary -	Retiree Assist Household Count -	Pre July 88 Indicator **Yes** Jan 1, 1985
Ext. Leave Benefits -	Higher ED Indicator -	Deputy Sheriff -	Deputy Sheriff Plan B -
Deputy Sheriff Retire Under 55 -	Declined Health (ACA) -	Salary Index **3 - $40,401 TO $46,400** Aug 21, 2025	Non-State No IDX Needed **3 - $40,401 TO $46,400** Jul 1, 2011

Contact - Address

Preferred	Address Type	Effective Date	Address 1	Address 2	City	State	ZIP Code	Country
✓	Mailing	01/18/2000	[redacted]	-	[redacted]	[redacted]	[redacted]	US
✓	Dependent	03/06/2023	[redacted]	-	[redacted]	[redacted]	[redacted]	US

Contact - E-mail

Preferred	E-mail Type	Start Date	Address
✓	Personal	01/01/2024	[redacted]

Contact - Phone

Preferred	Phone Type	Start Date	Number
✓	Home	01/01/2024	[redacted]

2. Scroll down to view the participant's **Employment Information** section.
This section includes the participant's current employment and salary details.

Employment Information

Company **BOONE CO BOARD OF EDUCATION** Sep 1, 2005	Annual Salary **$45,880.00** Jul 29, 2025	Rate Of Pay **$0.00** -	Pay Frequency **SemiMonthly** Jul 29, 2025
Employment Status **Active** Sep 1, 2005	Original Hire Date **Sep 1, 2005** -	Hire Date **Aug 22, 2005** -	Branch **005-State** Sep 1, 2005
Position Status -	Oasis ID -	Employment Type **ST** Sep 1, 2005	Member Benefit ID -

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

Coverage

Health

Alert	Plan	Option/Tier	Elected Volume	Approved Volume	Dependents	Event (Effective Date)	Coverage Start Date	Coverage End Date	Total Premium	EE Cost	ER Cost
	PPB Plan A	Employee Only	-	-	-	Conversion Recalc (08/21/2025)	05/01/2020	-	$889.00	$124.00	$765.00

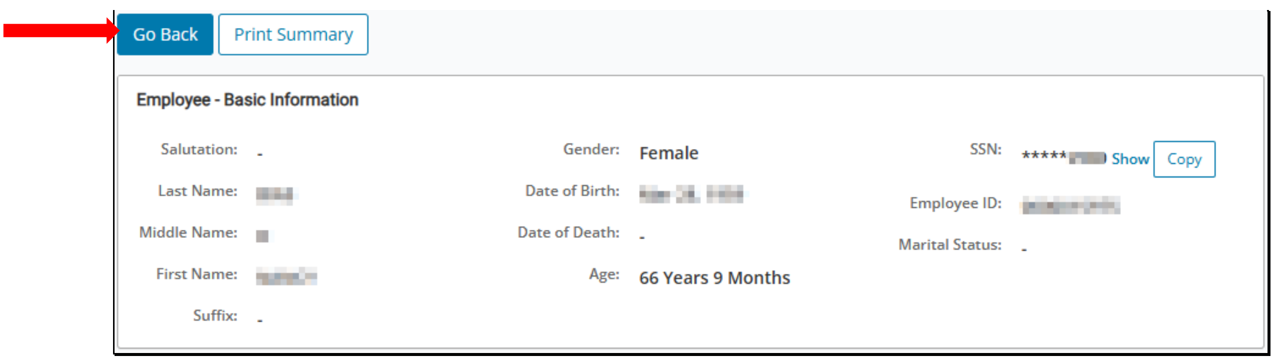
Basic Life Insurance and AD&D

Alert	Plan	Option/Tier	Elected Volume	Approved Volume	Dependents	Event (Effective Date)	Coverage Start Date	Coverage End Date	Total Premium	EE Cost	ER Cost
	Basic Life Insurance and AD&D	$10,000	$10,000.00	$10,000.00	-	Conversion Recalc (08/21/2025)	09/01/2005	-	$1.98	$0.00	$1.98

Optional Life and AD&D Insurance

Alert	Plan	Option/Tier	Elected Volume	Approved Volume	Dependents	Event (Effective Date)	Coverage Start Date	Coverage End Date	Total Premium	EE Cost	ER Cost
	Optional Life and AD&D Insurance	No Coverage	-	-	-	Conversion Recalc (08/21/2025)	08/21/2025	-	$0.00	$0.00	$0.00

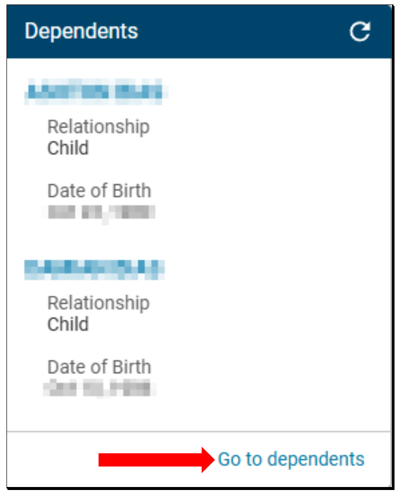
4. Scroll down to view the remaining sections.
   The screen includes sections for Dependents, Beneficiary Associations, and Medicare.



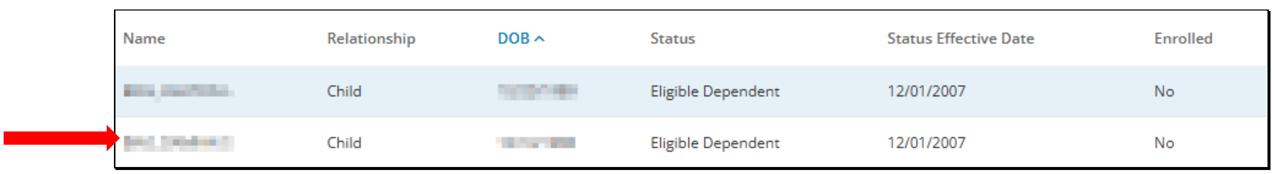
5. When finished viewing this screen, scroll back to the top and click the **Go Back** button to return to the main profile view.

3.2.2 Dependents

The participant's dependent information is available for display.



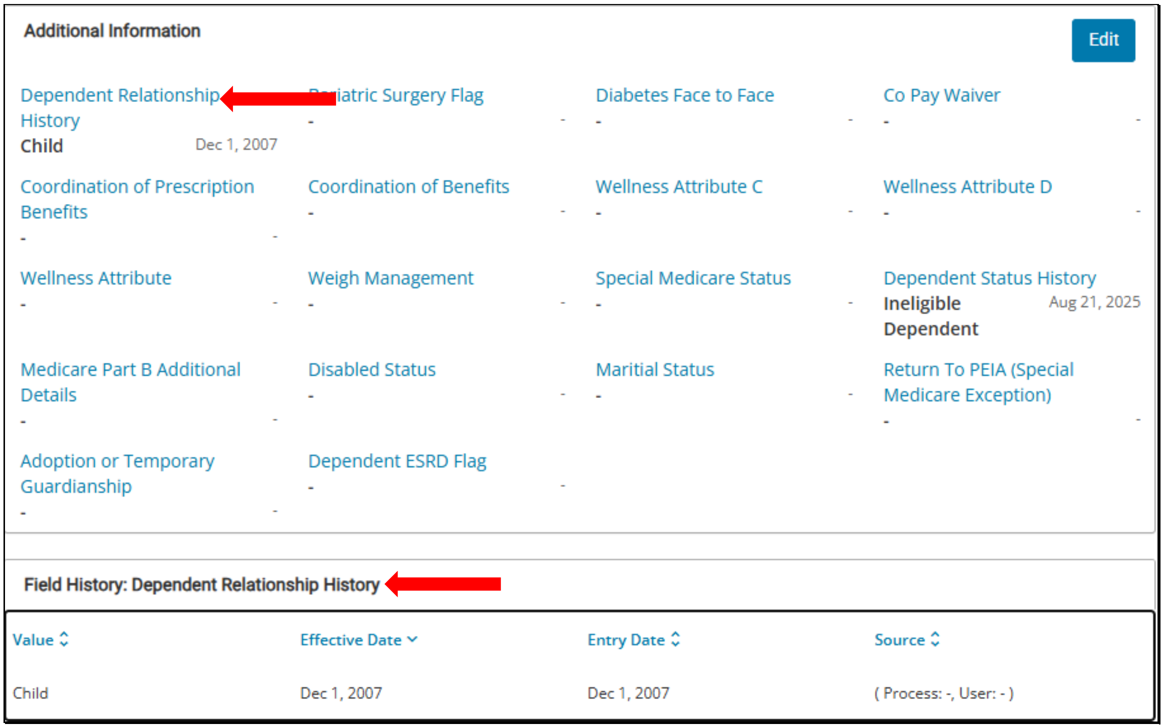
1. Click **Participant Summary** on the participant's menu, and then click the **Go to Dependents** link. The list of the participant's dependents displays.



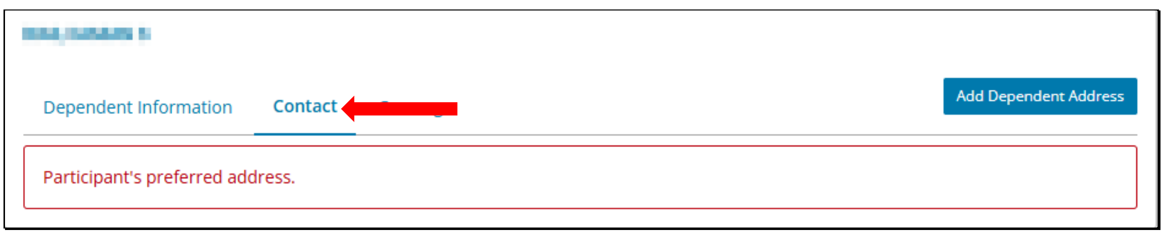
Name	Relationship	DOB ^	Status	Status Effective Date	Enrolled
[illegible]	Child	[illegible]	Eligible Dependent	12/01/2007	No
[illegible]	Child	[illegible]	Eligible Dependent	12/01/2007	No

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

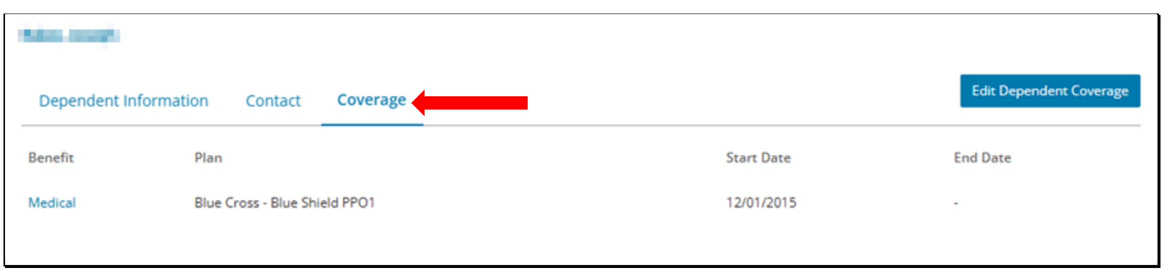
3. As with the participant’s profile, you may click a link in the Additional Information section to see its Entry Date in the Field History section.



4. Click the **Contact** link to display the dependent’s contact information.

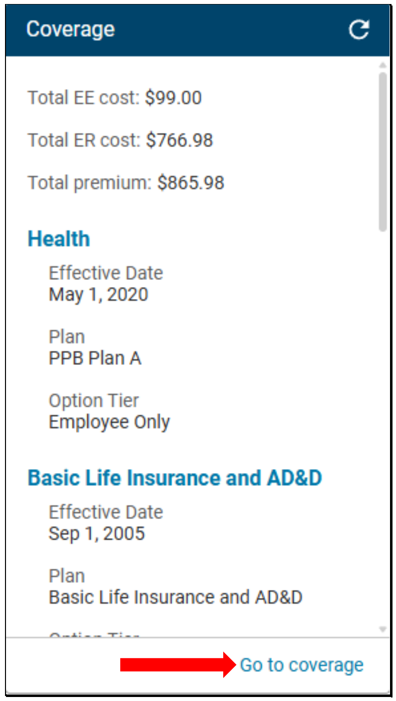


5. Click the **Coverage** link to display the dependent’s coverage information.

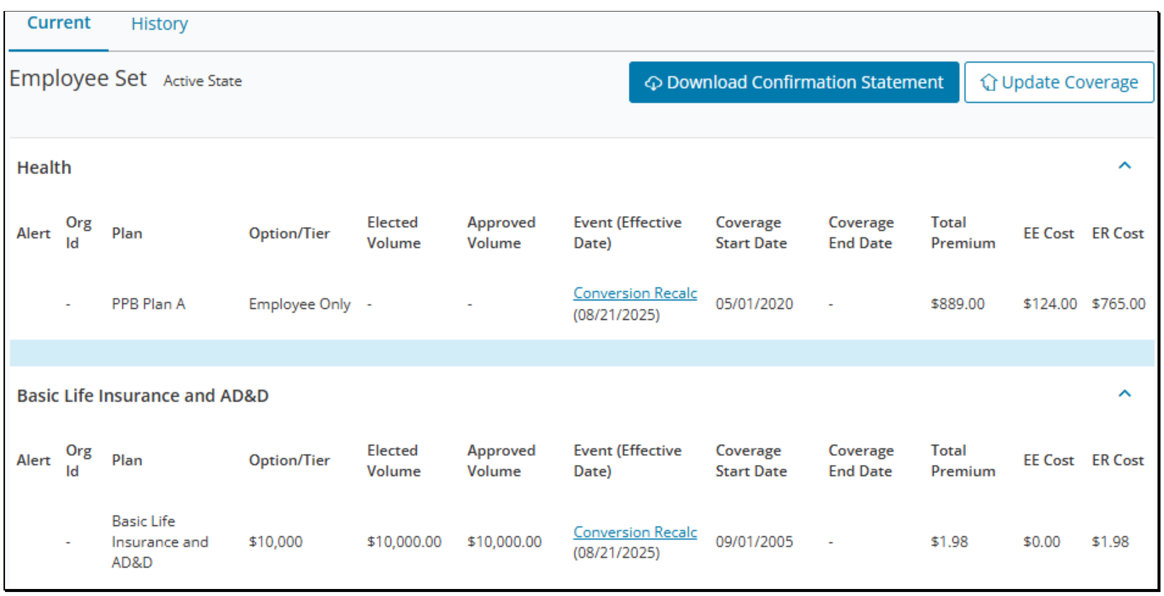


3.2.3 Coverage

The participant’s current and historical coverage information is available for display.



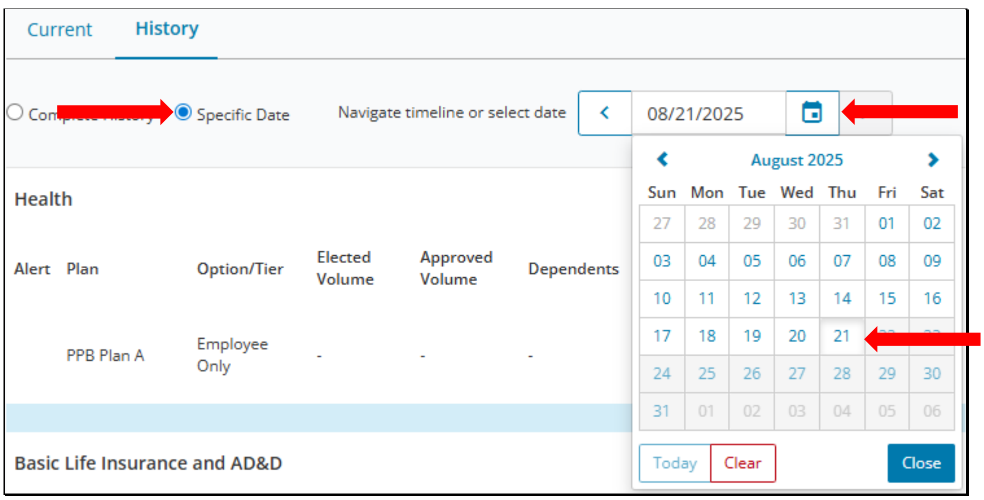
1. Click **Participant Summary** on the participant’s menu, and then click the **Go to Coverage** link. The participant’s current coverage data displays.



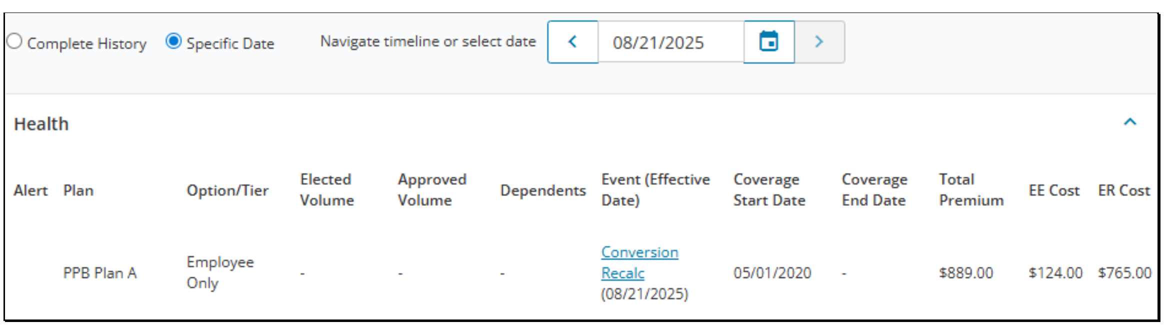
2. Scroll down the screen to review all participant and dependent coverage information.

3. Click the **History** link.
   The participant's complete coverage history shows. This tab also includes future elections.

4. Click the **Specific Date** option.

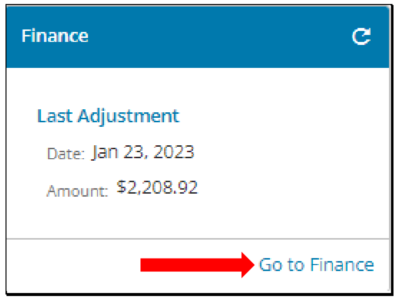


5. Click the **calendar icon** to select a new date.
   The system shows coverage data as of the selected date.

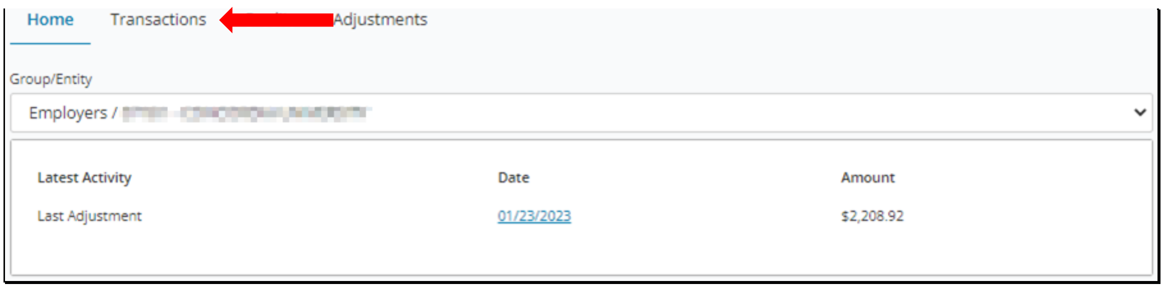


3.2.4 Finance

The Finance link displays the participant's Billing screen.



1. Click **Participant Summary** on the participant's navigation menu, and then click the **Go to Finance** link. The Home tab for the participant's financial data displays with Latest Activity.



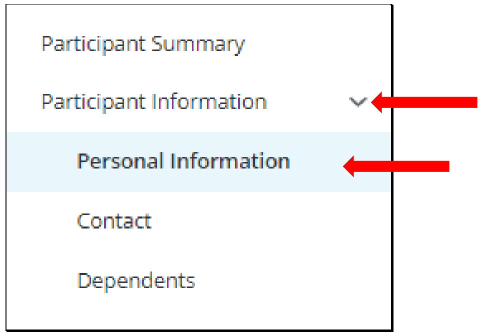
2. Click the **Transactions** link.
   The participant's invoiced benefits screen display.

Search Results

ID	Group/Entity	Date	Transaction Type	Item	Coverage	Billing Period	Person ID	Name	Amount
1845876	Employers / -	01/23/2023	Payment	Retirement Plan	Retirement Plan (Pension) / tradReg	01/01/2023 - 01/31/2023			
1845156	Employers / -	01/23/2023	Payment	Disability	Disability / Disability Benefit A / 70% of Annual Compensation	01/01/2023 - 01/31/2023			
1841454	Employers / -	01/23/2023	Payment	Retirement Plan	Retirement Plan (Pension) / tradReg	12/01/2022 - 12/31/2022			
1840788	Employers / -	01/23/2023	Payment	Disability	Disability / Disability Benefit A / 70% of Annual Compensation	12/01/2022 - 12/31/2022			
1836721	Employers / -	01/23/2023	Payment	Retirement Plan	Retirement Plan (Pension) / tradReg	11/01/2022 - 11/30/2022			

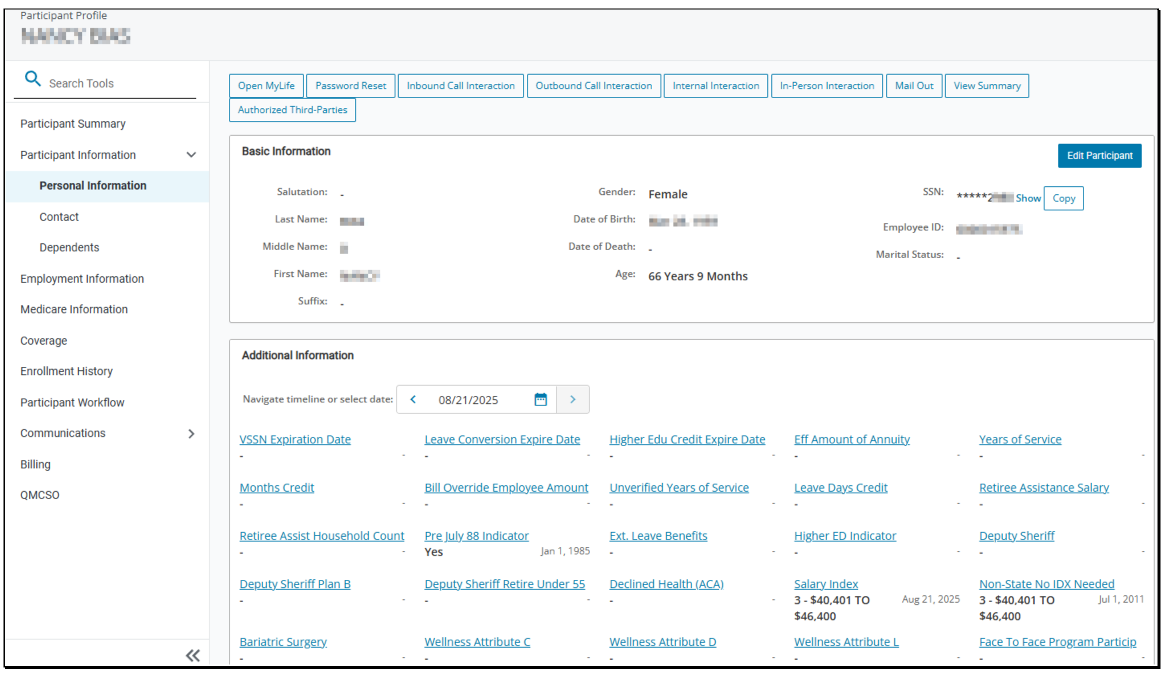
3.3 Participant Information

Another way to view much of the information in the Participant Profile is to use the **Participant Information** option on the participant navigation menu.

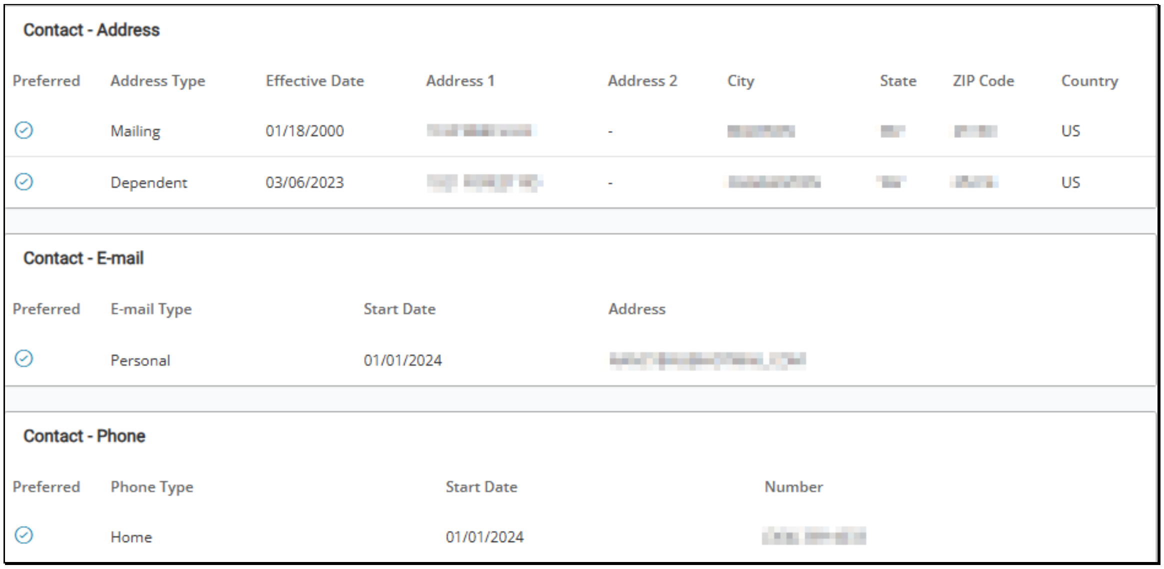


1. Click **Participant Information** on the participant navigation menu.
   The menu expands to reveal subcommands.

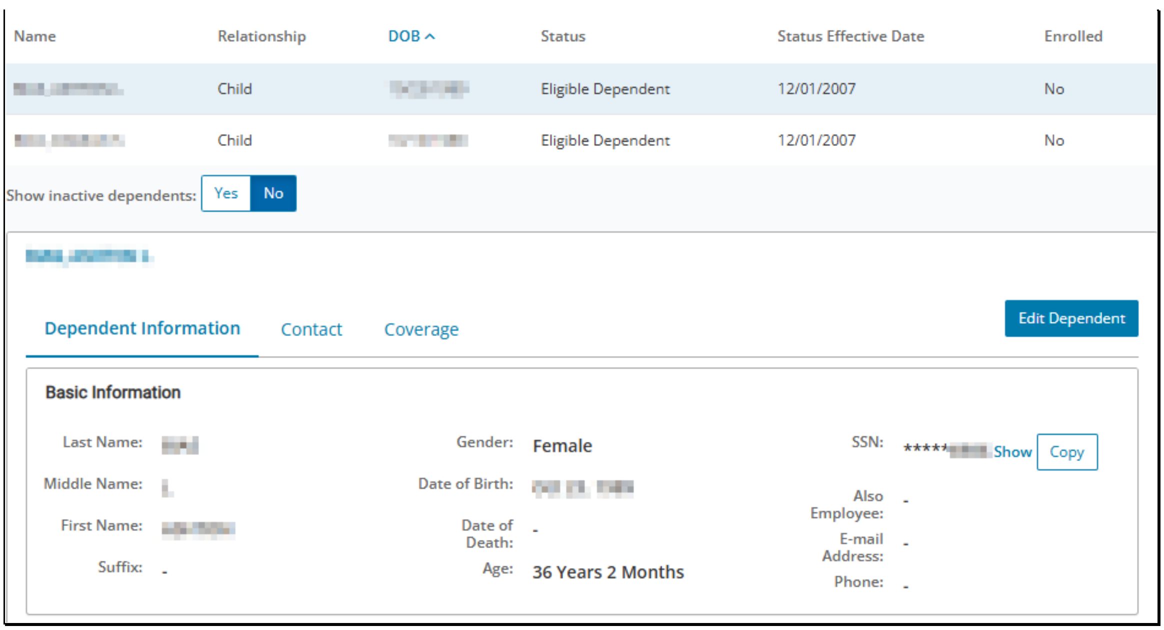
2. Click **Personal Information**.
   The screen displays the same data as in the Profile section.



3. Click **Contact**.
   The screen displays the same data as with the View Summary option.



4. Click **Dependents**.
   The screen displays the data as with the Dependents option.



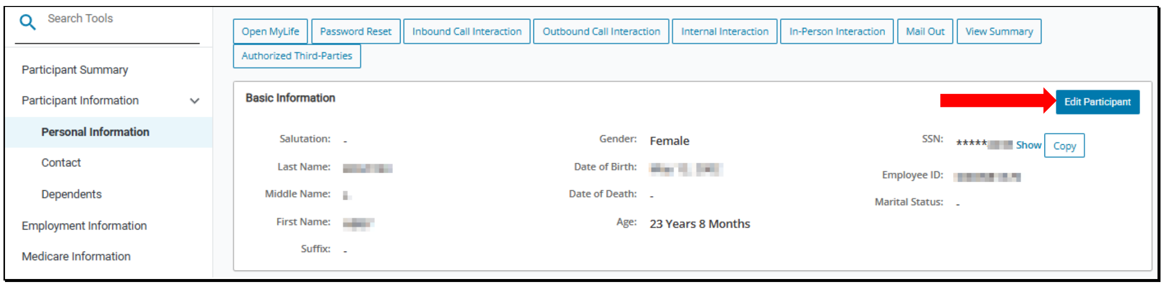
4 Edit Participant and Add Participant

4.1 Edit Participant

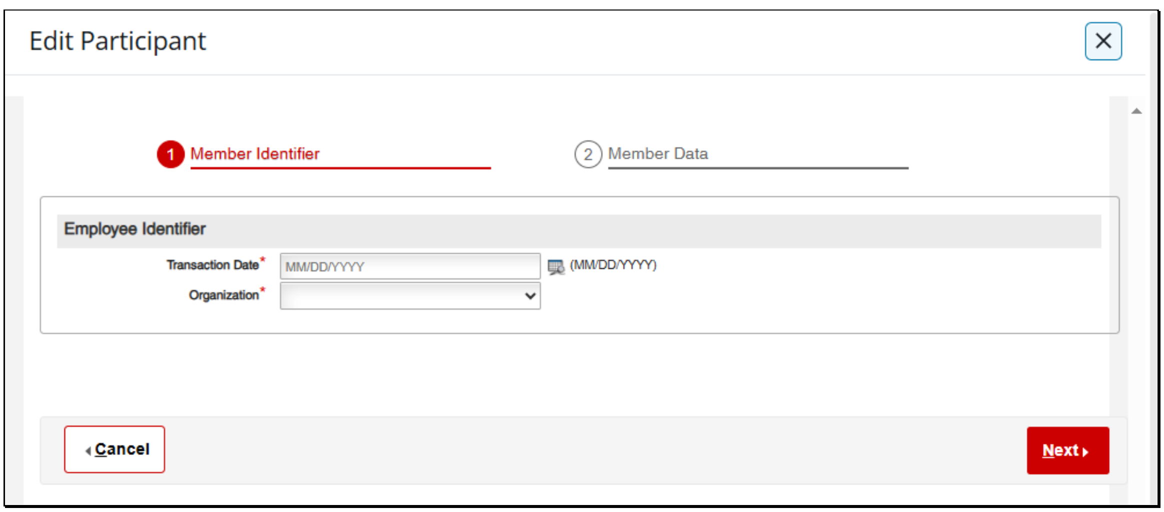
An employer may use the **Edit Participant** functionality to make updates to a participant's demographic data, or to update coverages as in the processing of an event. (This feature may not be available for all employer users.)

Begin with a Participant Search; select a participant and access their Personal Information. The **Edit Participant** functionality is available as a button on a participant's **Personal Information** screen.

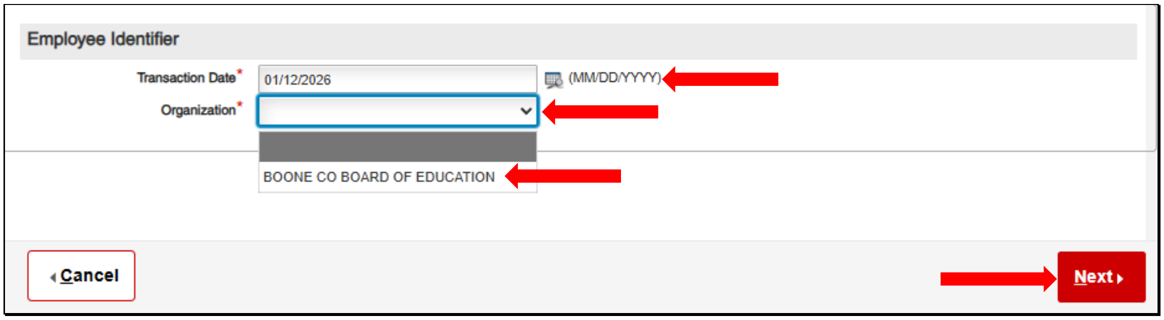
In this example, change the participant's Employment Information to Part-Time.



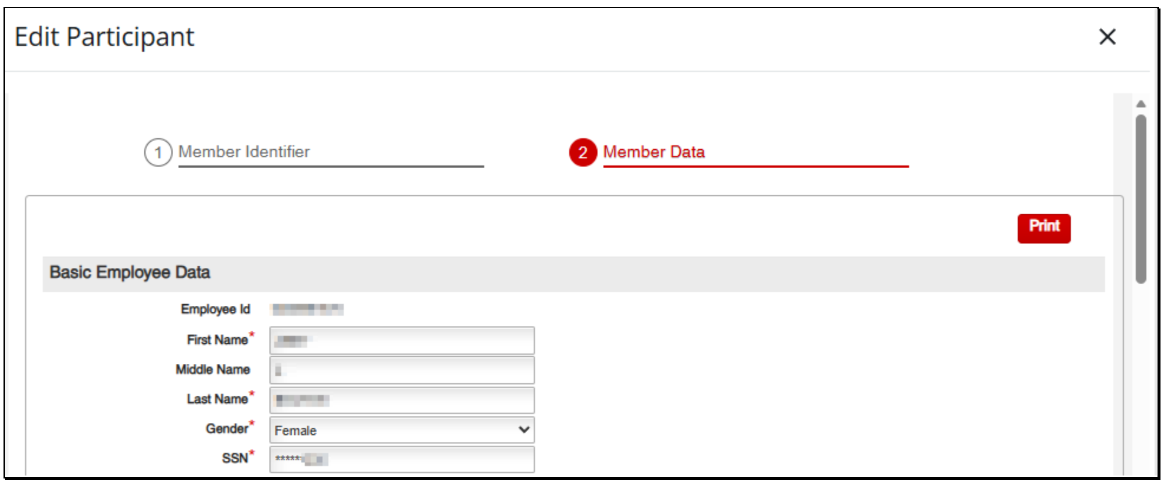
1. Click the **Edit Participant** button.
   The Edit Participant window opens to the Member Identifier screen.



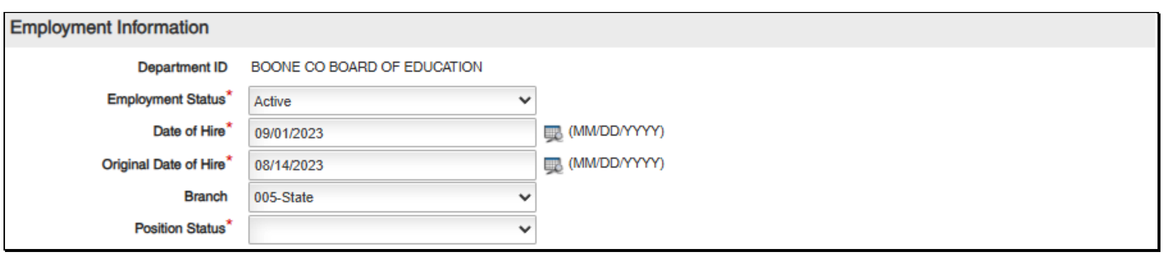
2. Click the calendar icon in the **Transaction Date** field, and select the appropriate date for the change.
3. Click the drop-down arrow in the **Organization** field, and select the participant's employer.

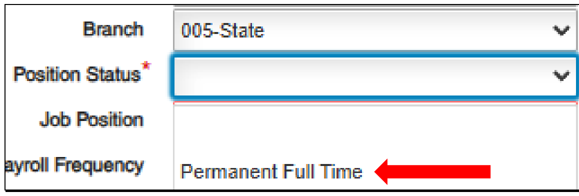


4. Click the **Next** button.
   The Edit Participant window advances to the Member Data screen.



5. Scroll down to the **Employment Information** section.

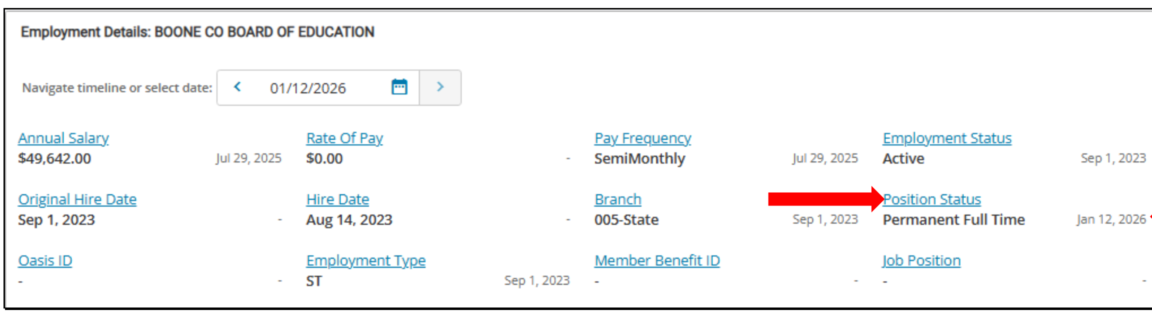




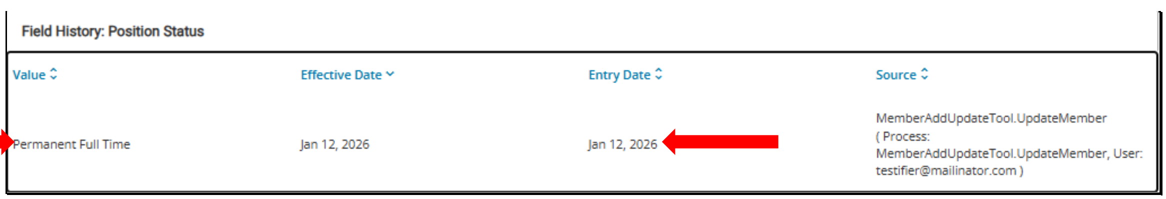
6. For this example, click the drop-down arrow in the **Position Status** field, and select **Permanent Full Time**.

7. Scroll to the bottom of the window and click the **Next** button.
   The system returns to the Personal Information screen.

8. Select **Employment Information** on the participant navigation menu.
   Note the entry in the **Position Status** field of the Employment Details section; it should reflect the date you selected for the transaction in step 2.



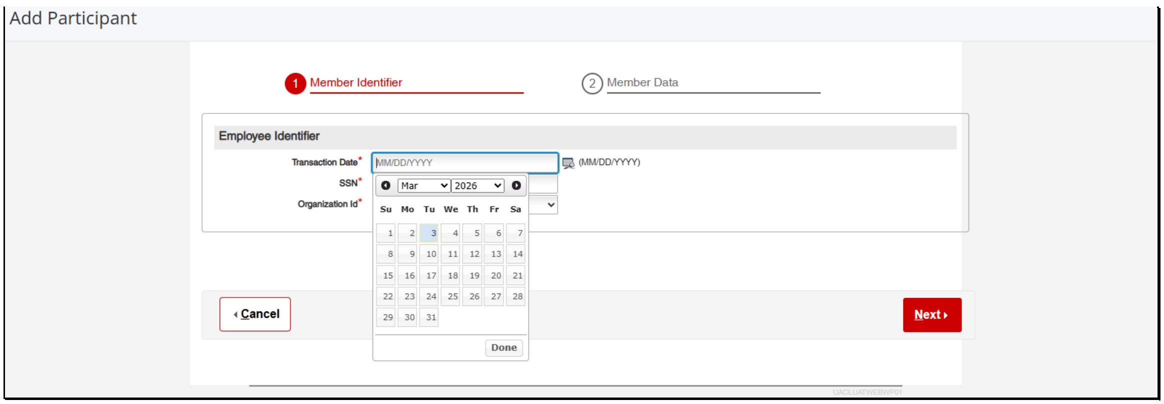
9. Click the **Position Status** link.
   The Field History section below reflects the details of the change.



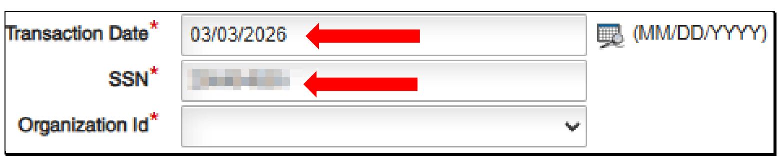
4.2 Add Participant

Most new employees are added into the system by means of an HR file import, which is managed by a PEIA administrator. When needed, the Add Participant functionality allows you to create new employees quickly.

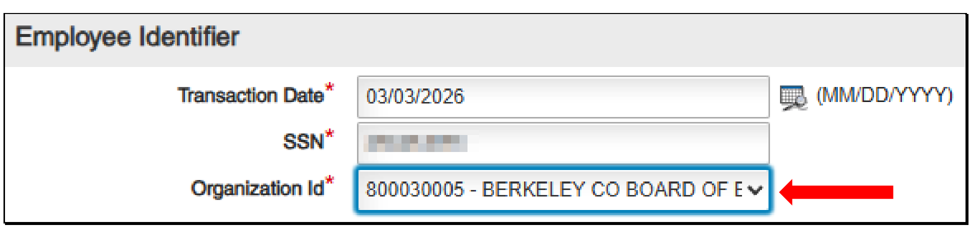
1. Click **Add Participant** on the left navigation menu.
   The Add Participant screen displays.



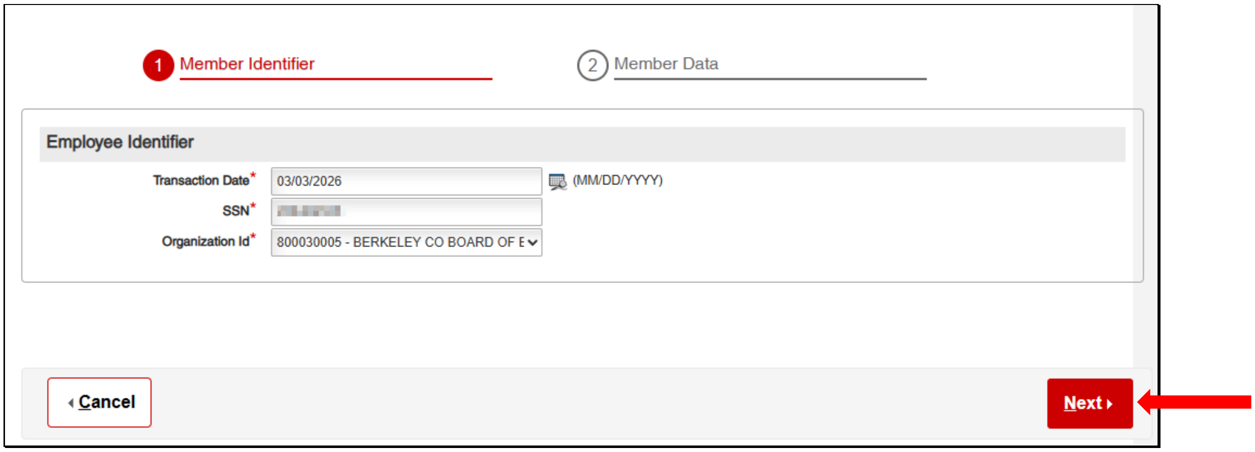
2. Select the current date for the **Transaction Date** field.



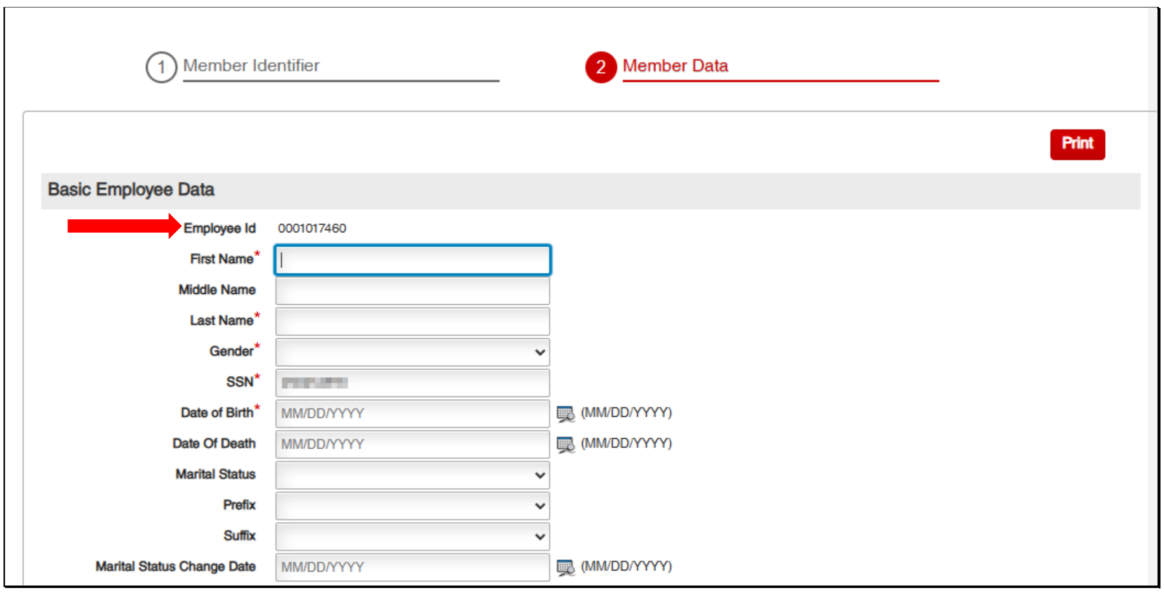
3. Type the new participant's Social Security number in the **SSN** field.



4. Click the drop-down arrow in the **Organization Id** field, and select the new participant's organization. Usually only one organization shows, but it is possible for an employer administrator to support multiple organizations.



5. Click the **Next** button.
   The Member Data screen displays.



Note the new **Employee ID** at the top, generated automatically by the system.

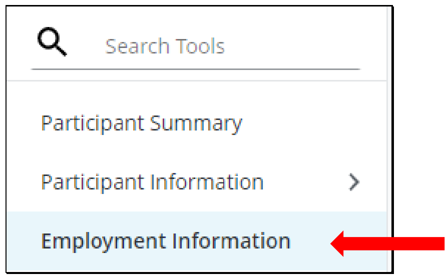
Required fields are indicated with a red asterisk (*).

6. Complete all the required fields appropriately.

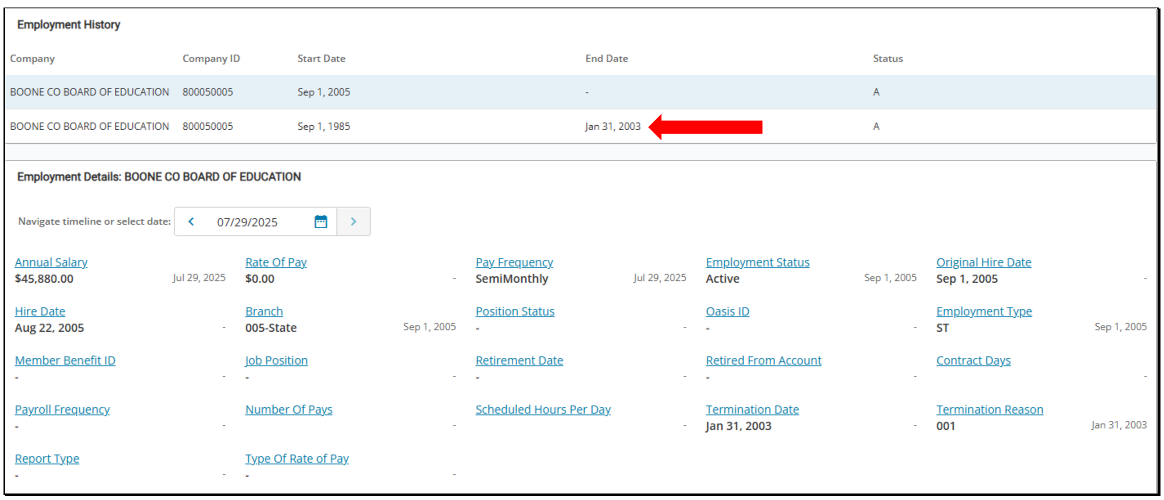
7. Scroll to the bottom of the screen and click the **Next** button.
   The system returns to the Home screen.

5 Employment Information

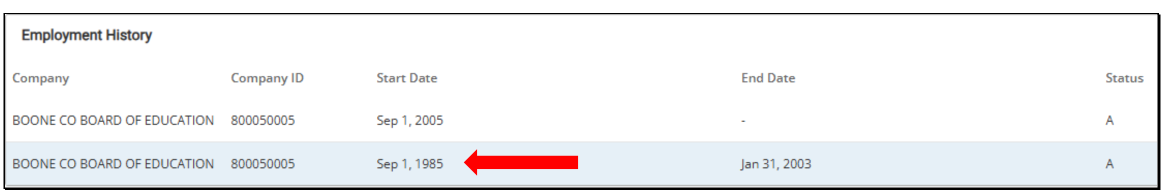
The Employment Information option provides details about a participant's employment history, employment details, and history for each field.



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



In this example, the participant has had two separate employments with Boone County Board of Education. Note the date on the second row in the **End Date** column, indicating the end of the previous employment. The Employment Details and Field History sections below are for the selected employment.



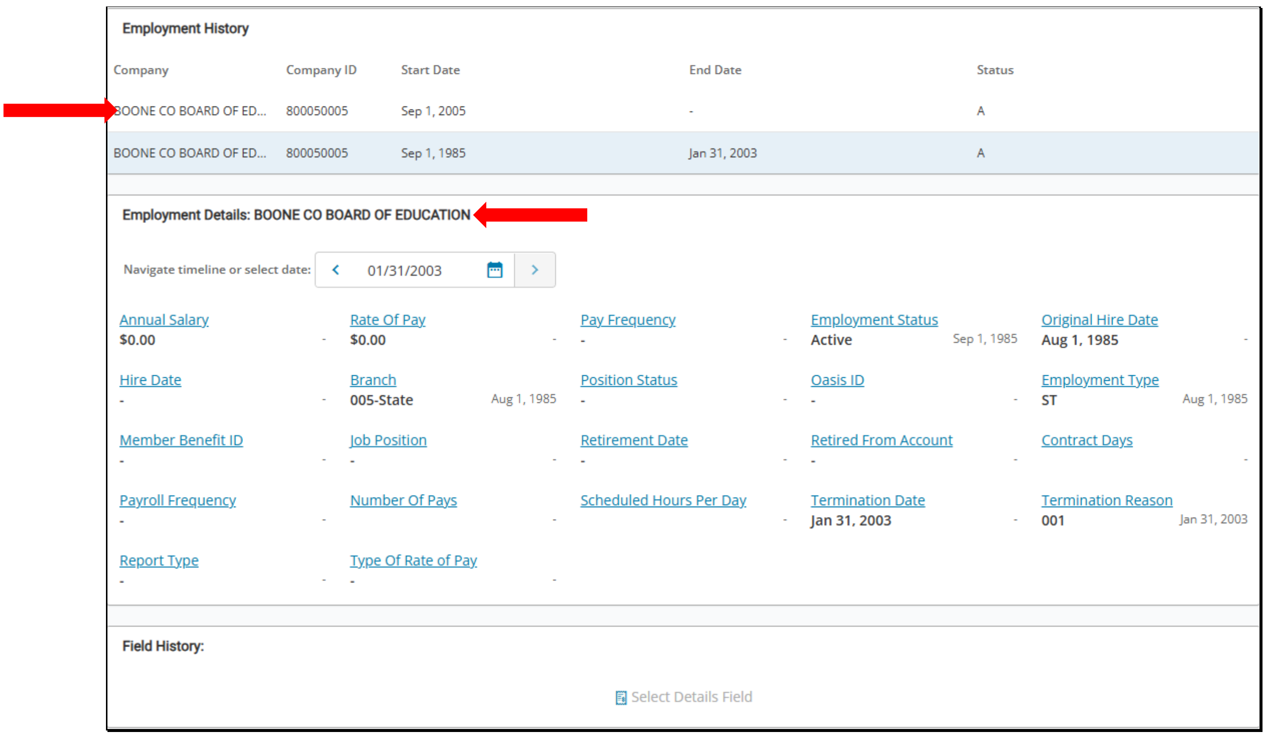
2. Click on each row in the **Employment History** section to view the details for each employment.

5.1 Employment History

The Employment History section lists the participant's employers and the dates the participant was employed. Each employer is listed on a separate line. If the participant worked for different organizations within the same profile, there is a separate line for each organization. A participant cannot have an active work status at multiple organizations simultaneously within the same profile. Participants active in multiple organizations at the same time have separate profiles.

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

1. Click on a name in the **Company** column to select it and view the Employment Details below.



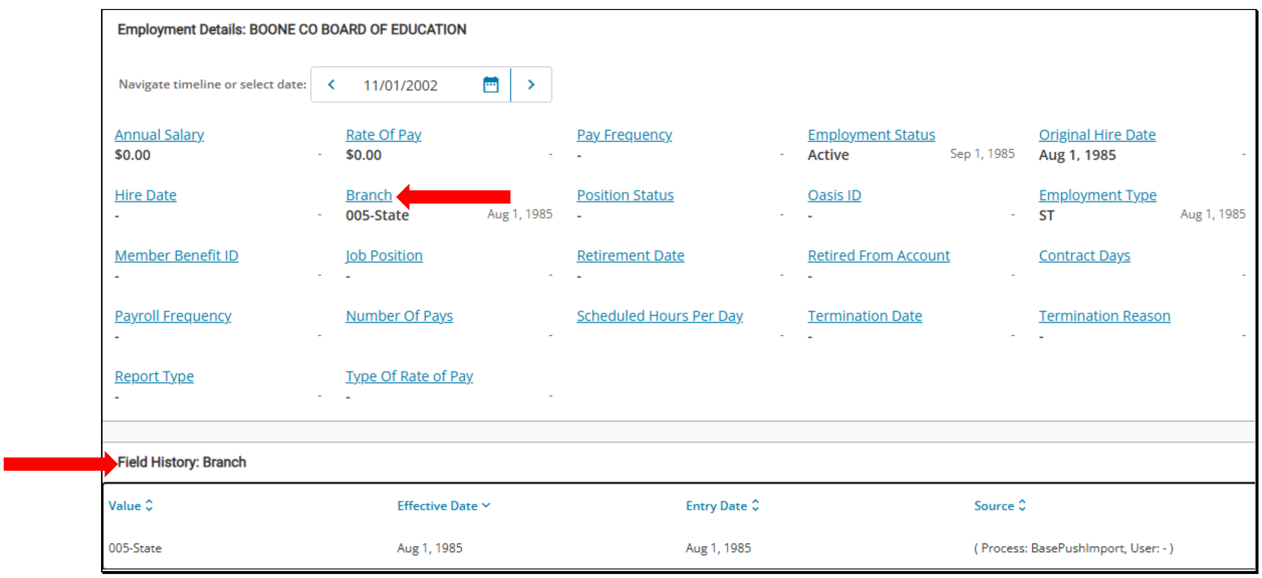
5.2 Employment Details

The **Employment Details** section displays 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.

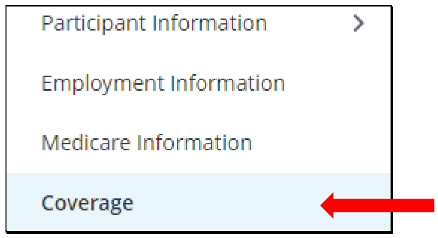
The **Field History** section displays historical data for the selected field in the Employment Details section.



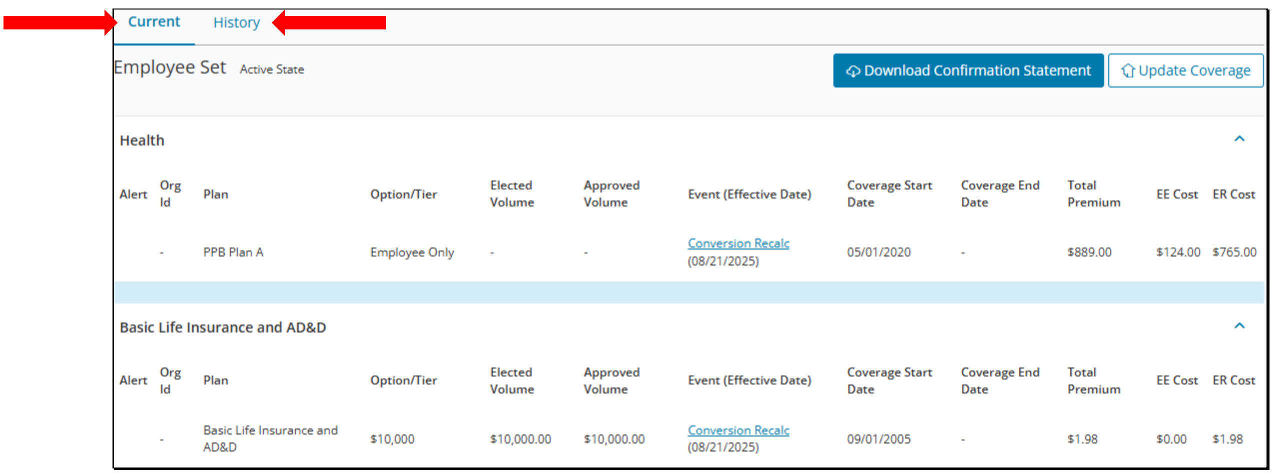
6 Coverage

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

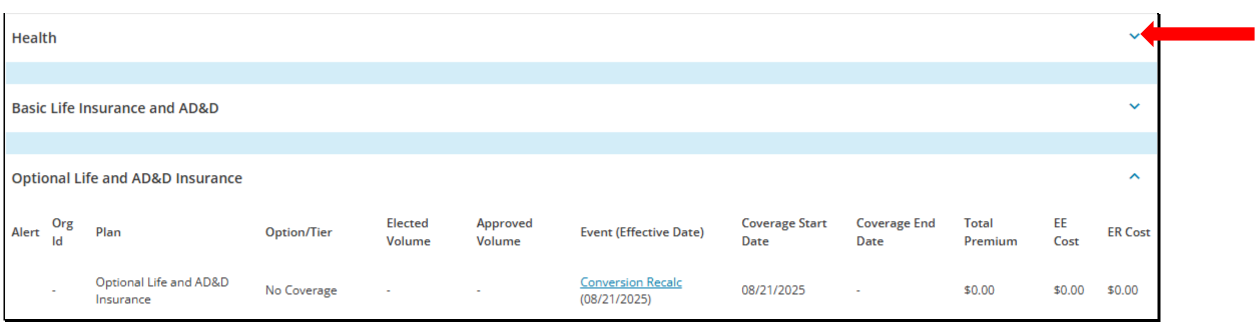
1. Select **Coverage** from the participant navigation menu.



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



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

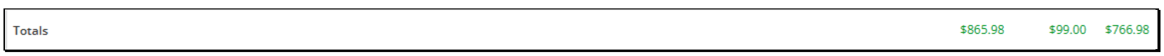


2. Click an upward pointing arrow to collapse a section; click a downward pointing arrow to expand the section.

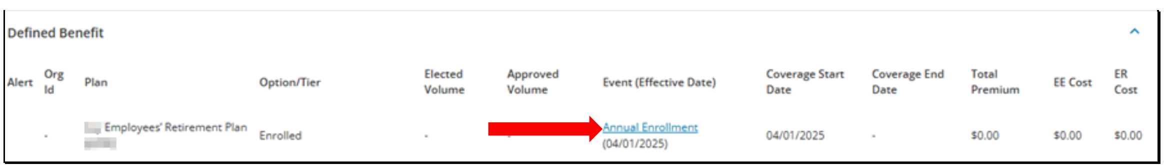
6.1 Coverage – Current Tab

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

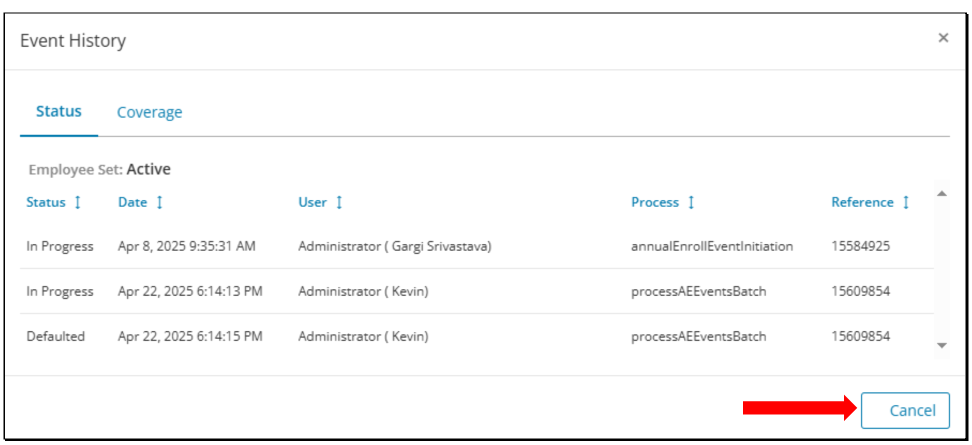
- Alert – shows EOI and future dated flags
- Org Id – indicates the PEIA Employer ID for which the participant is employed
- Plan – indicates the plan/option for benefits for which the participant is enrolled
- Option/Tier – indicates the plan option for which the participant is enrolled; for example: dollar amount, percentage of annual pay, etc.
- Elected Volume –indicates the dollar value the participant has for life benefits
- Approved Volume – indicates the dollar value approved for the life benefits
- 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 ends (if applicable)
- Total Premium – total of EE Cost and ER cost per benefit
- EE Cost – Employee cost per benefit, if the employer cost share was provided
- 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.

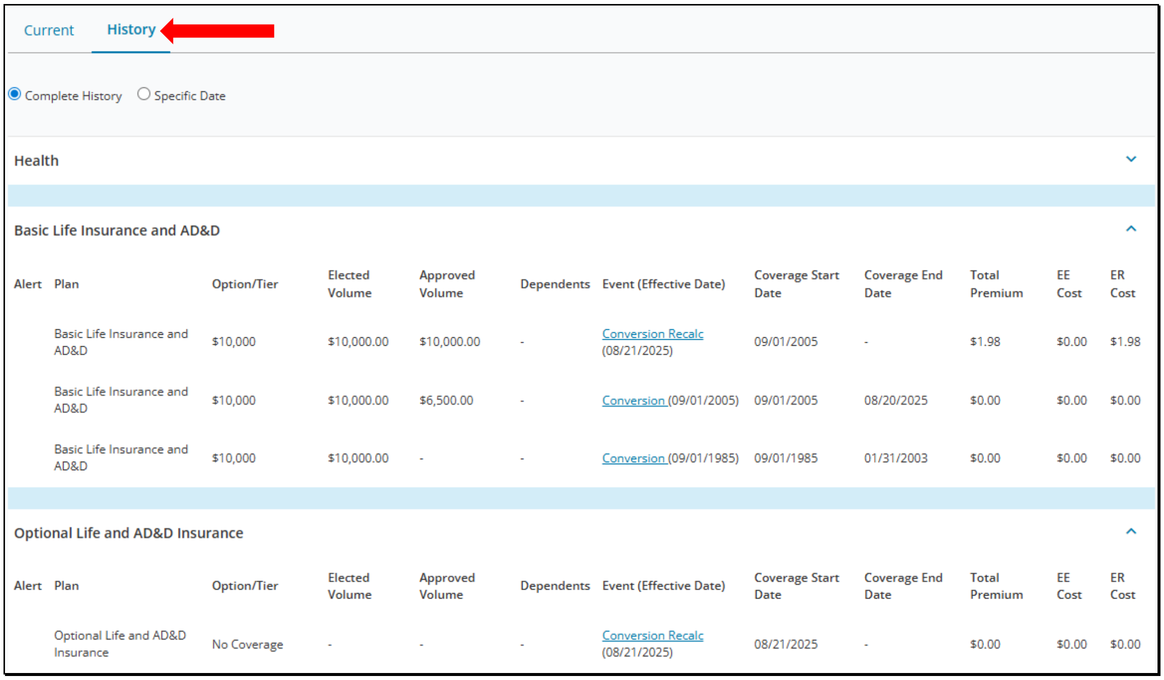


2. Click the **Cancel** button to close the Event History window when finished viewing.

6.2 Coverage – History Tab

The History tab shows the participant's previous or future coverages. View the entire history (default) or select a date to see coverages in effect on that date.

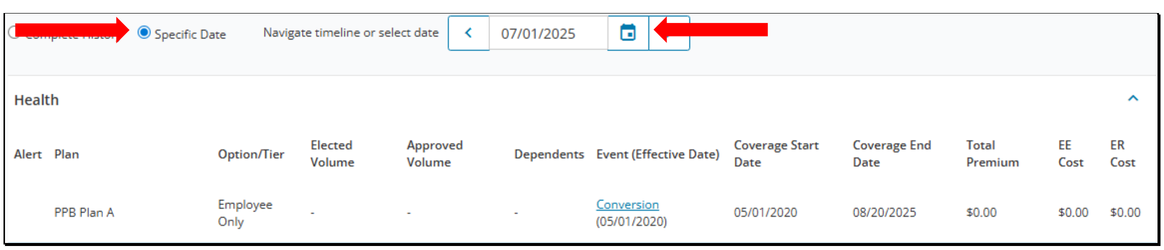
1. Click the **History** tab.



To change the display to the coverage in effect on a specific date:

2. Click the **Specific Date** option.
   This enables the Navigate timeline or select date object.

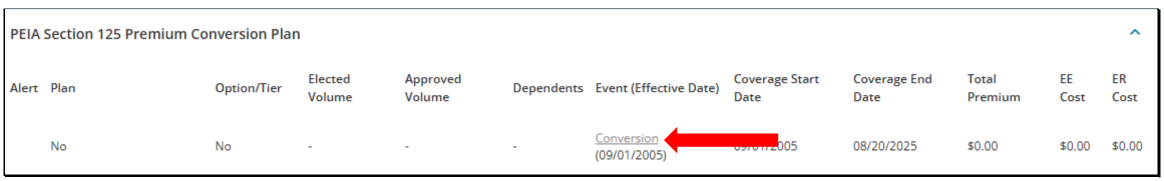
3. Select the date from the **Navigate timeline or select date** object**.**



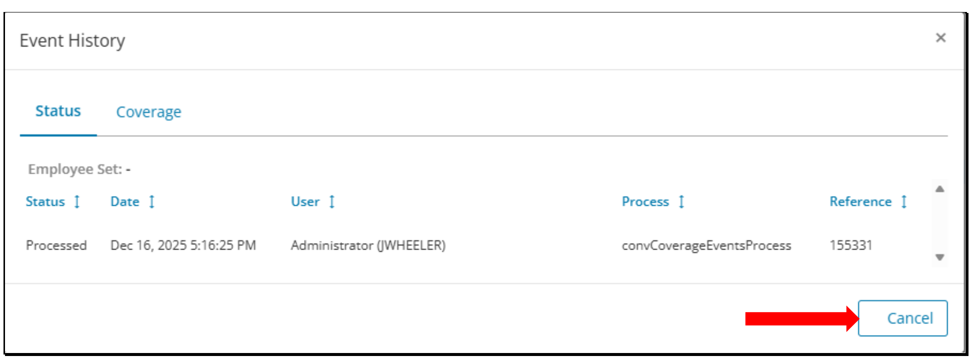
The History tab lists each benefit offered and the participant's history of coverages for each benefit. Included fields:

- Alert – shows EOI and future dated flags
- Plan
- Option/Tier
- Elected Volume – indicates the dollar value the participant has for life benefits
- Approved Volume – indicates the dollar value approved for the life benefits
- Dependents
- Event (Effective Date)
- Coverage Start Date – the date the coverage begins, appears for each row of changes processed for the participant
- Coverage End Date – the date the benefit ended, appears for each event that has been processed and for the changes applied for the benefit. This will be blank for the latest, or current event, row for the benefits and the coverage remains active. For each event, the system records an end date and new begin date regardless of the changes.
- Total Premium
- EE Cost
- ER Cost

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



1. Click on the event name in the **Event (Effective Date)** field.
   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.

7 Enrollments and Events

7.1 Enrollment History

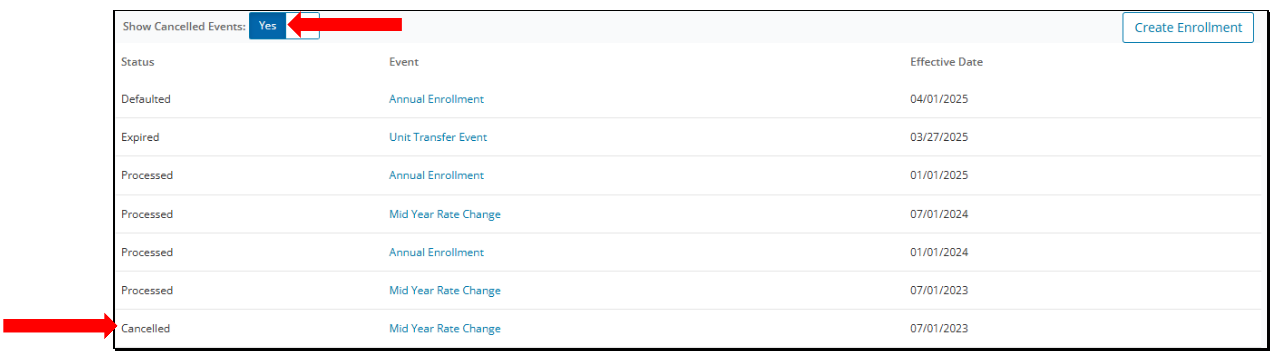
Enrollment History provides details on the participant's events history. Events include life and employment changes, such as marriage, birth of a child, or employment termination. Displayed details include event status, name of event, and effective date for the events processed on the participant's record.

1. Click **Enrollment History** on the participant navigation menu.
   The participant's Enrollment History screen displays with the participant's previous events.

Status	Event	Effective Date
Defaulted	Annual Enrollment	04/01/2025
Processed	Annual Enrollment	01/01/2025
Processed	Mid Year Rate Change	07/01/2024
Processed	Annual Enrollment	01/01/2024

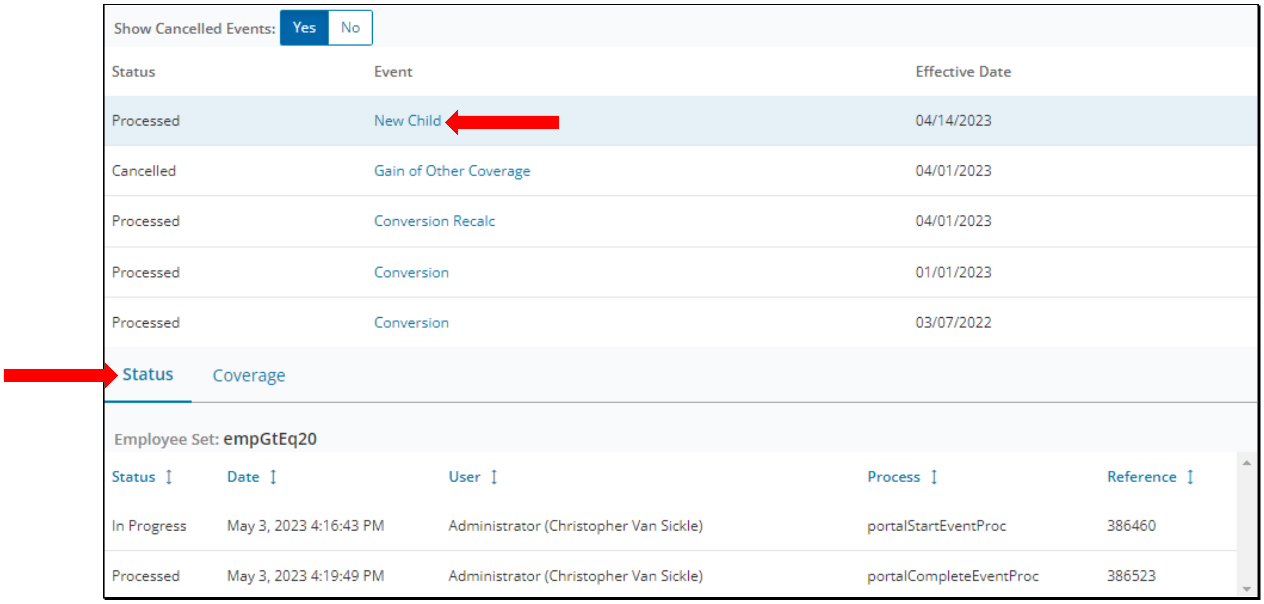
The Show Cancelled Events option defaults to *No*.

2. Click the **Yes** option in the **Show Cancelled Events** field.
   If the participant has any cancelled events, they now show.



Status	Event	Effective Date
Defaulted	Annual Enrollment	04/01/2025
Expired	Unit Transfer Event	03/27/2025
Processed	Annual Enrollment	01/01/2025
Processed	Mid Year Rate Change	07/01/2024
Processed	Annual Enrollment	01/01/2024
Processed	Mid Year Rate Change	07/01/2023
Cancelled	Mid Year Rate Change	07/01/2023

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:

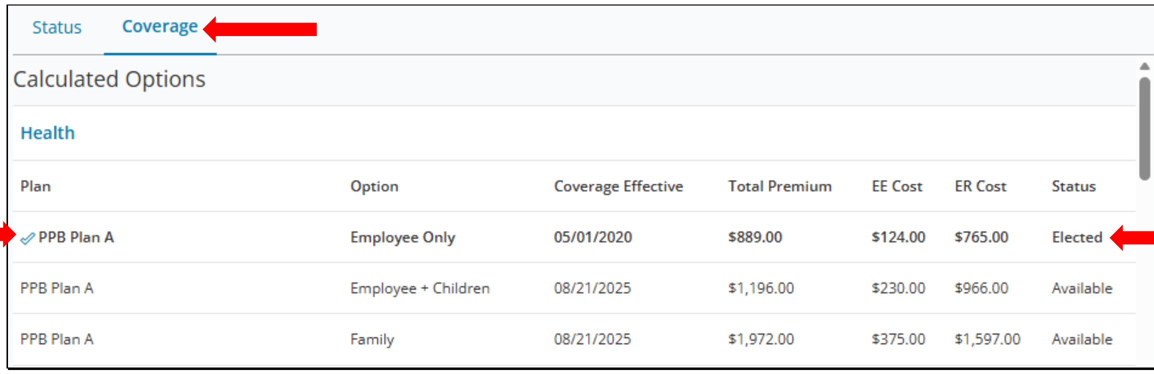
- Status – indicates the status of the event during the process from initiating the event to completion
- Date – the date the event was entered to apply the change
- User – user details for the administrator who processed these events at each stage
- Process – the process that was performed for the event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

About statuses:

- A participant 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 participant 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

Health

Plan	Option	Coverage Effective	Total Premium	EE Cost	ER Cost	Status
PPB Plan A	**Employee Only**	**05/01/2020**	**$889.00**	**$124.00**	**$765.00**	**Elected**
PPB Plan A	Employee + Children	08/21/2025	$1,196.00	$230.00	$966.00	Available
PPB Plan A	Family	08/21/2025	$1,972.00	$375.00	$1,597.00	Available

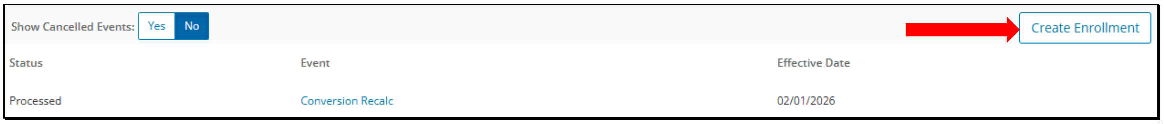
Note the **check marks** and **bold text** indicating the **Elected** options.

Calculated options for each benefit:

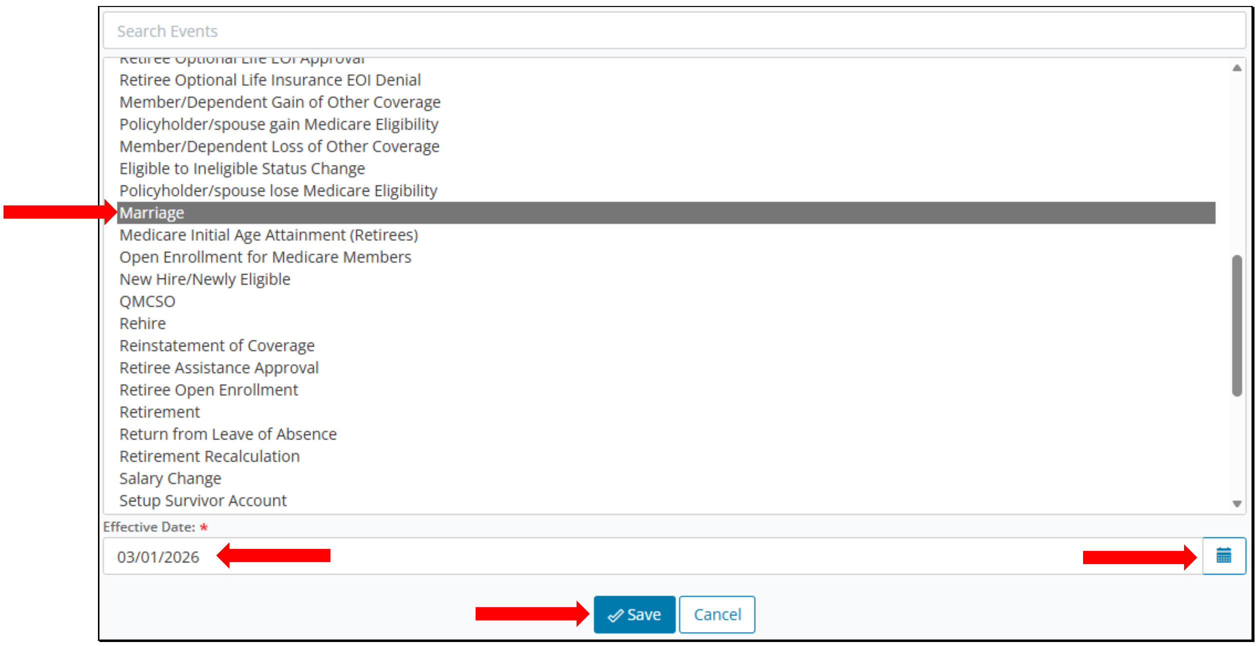
- Plan – indicates the elected and available plan for each benefit
- Option – the elected and available option for each benefit
- Coverage Effective – the date the coverage is effective for elected and available statuses
- Total Premium – total cost of each benefit
- EE Cost – EE coverage available under 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

7.2 Create Enrollment

Create Enrollment is used to add a new event for a participant. To begin:



1. Click the **Create Enrollment** button on the Enrollment History page.
   A list of available events displays.

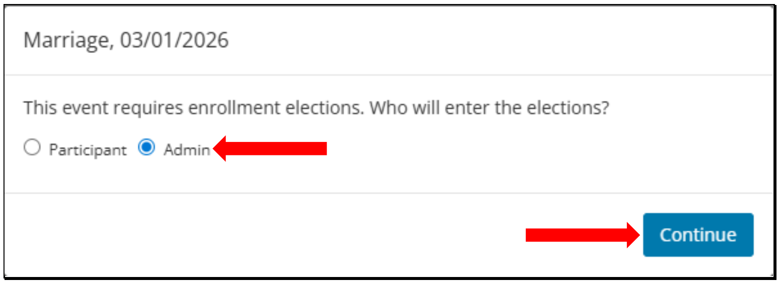


Note that the list of available events is *intelligent*, in that the list shows only those events that may be available for the participant. In the pictured example, the participant does not have a spouse on record, therefore, Marriage is available. (Divorce, however, does not display.)

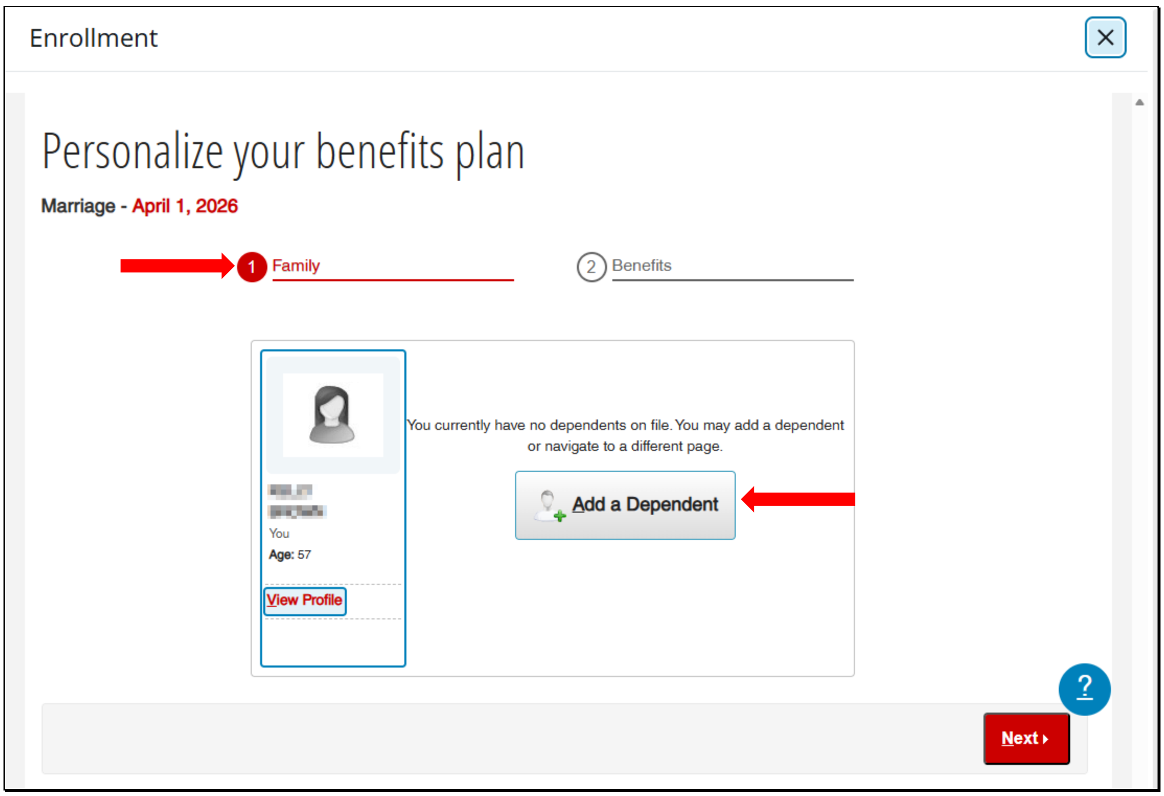
2. Click to select the appropriate event.
   In this example, select **Marriage**.

3. Use the calendar below to set an **Effective Date.**
   The Effective Date is the date that the change should be effective, and the system will use this date as the coverage effective date.

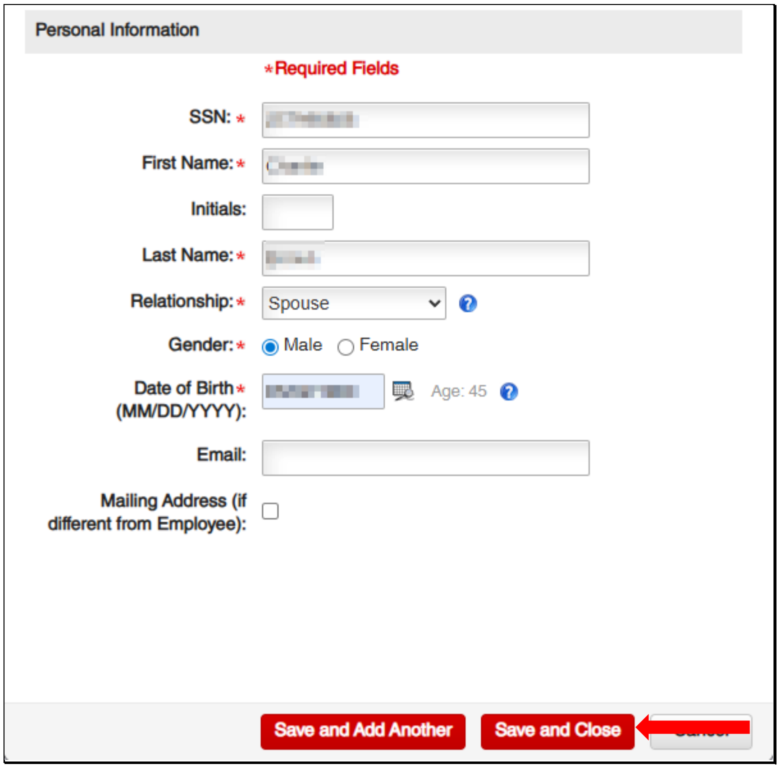
4. Click the **Save** button.
   The system prompts for who will enter the enrollment elections.



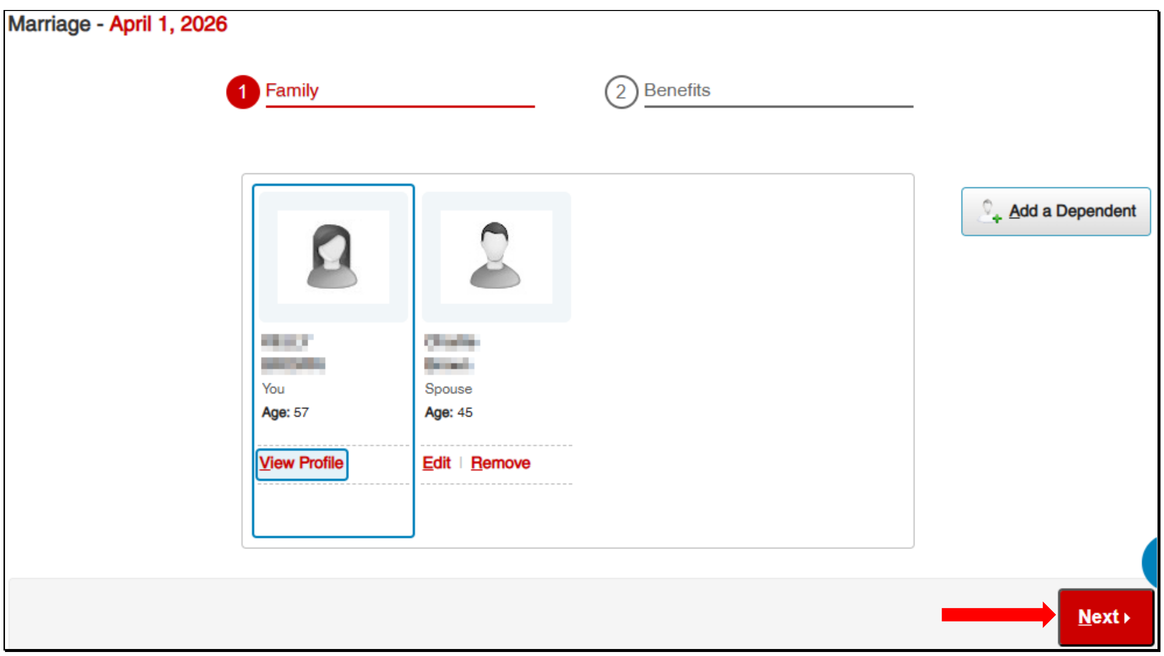
5. Select the **Admin** option, and click the **Continue** button.
   The **Enrollment**, **Personalize your benefits plan** window opens, **Family** tab selected.



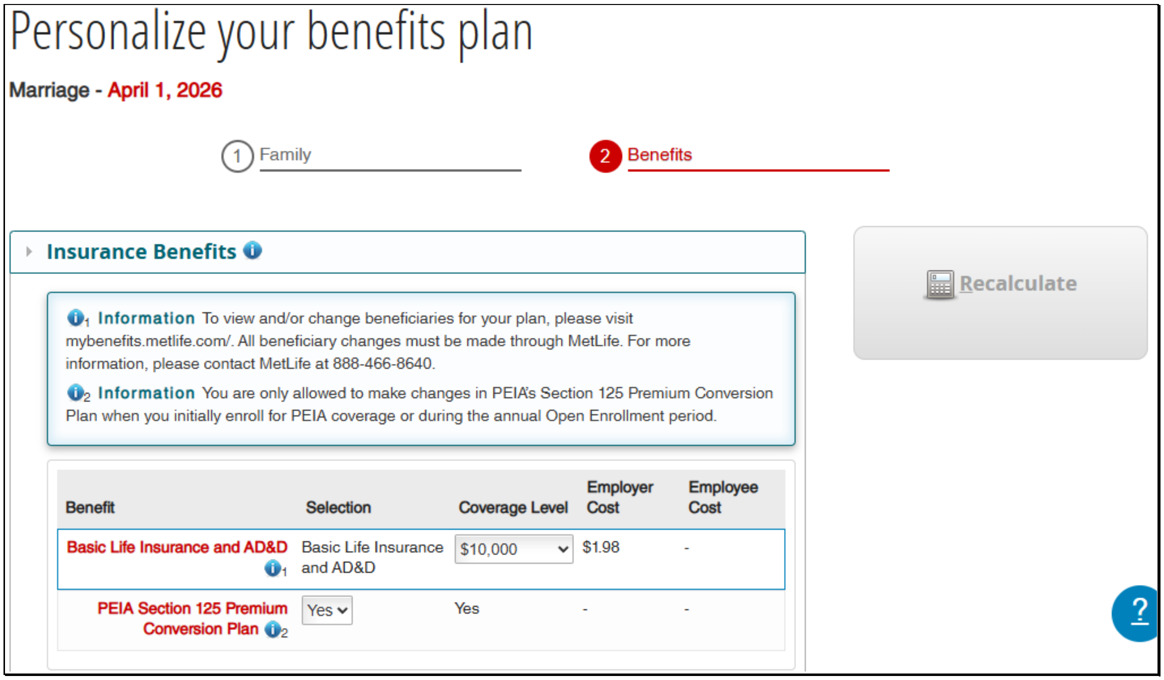
6. Click the **Add a Dependent** button.
   The Add a Dependent window opens.



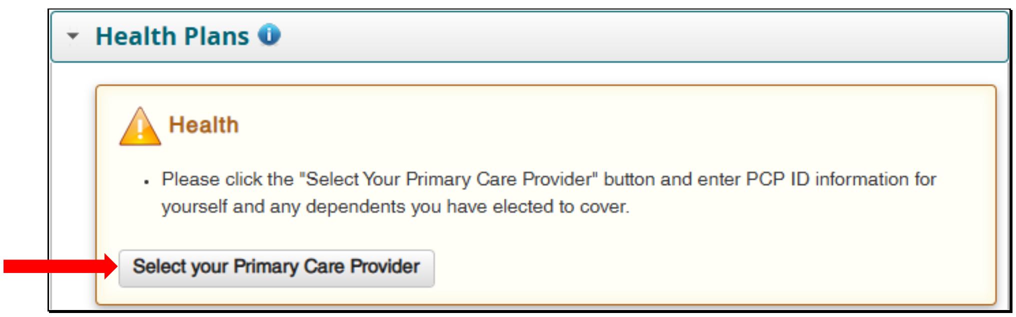
7. Enter the required fields, and then click the **Save and Close** button.
   The system returns to the Family screen



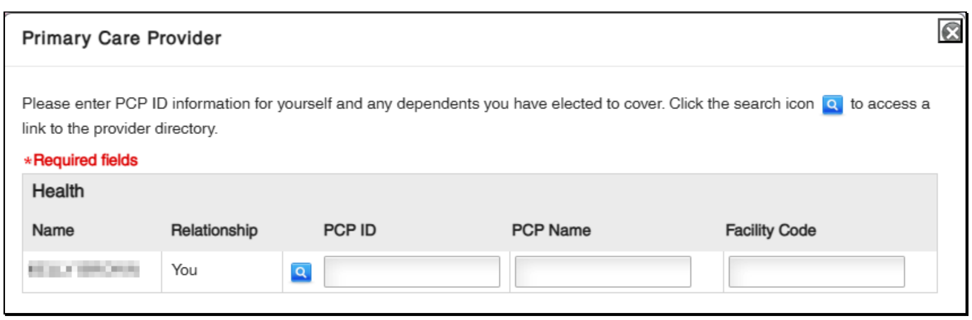
8. Click the **Next** button.
   The Personalize your benefits plan window, **Benefits** tab displays.

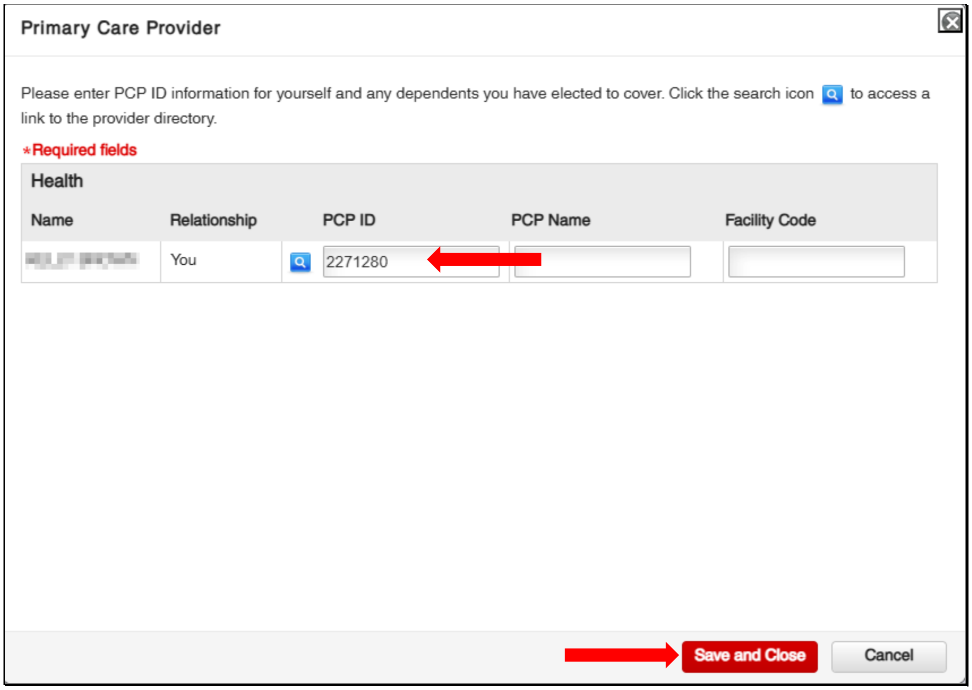


9. Scroll down to the **Health Plans** section.
   In this example, the Select Your Primary Care Provider section displays.

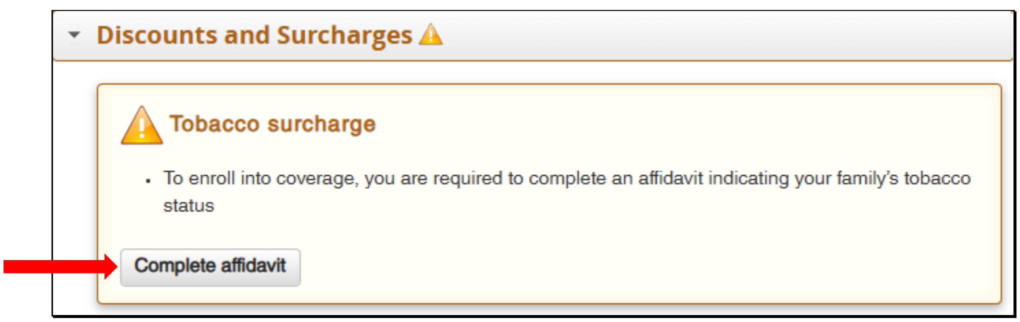


10. Click the **Select Your Primary Care Provider** button.
    The Primary Care Provider window opens.

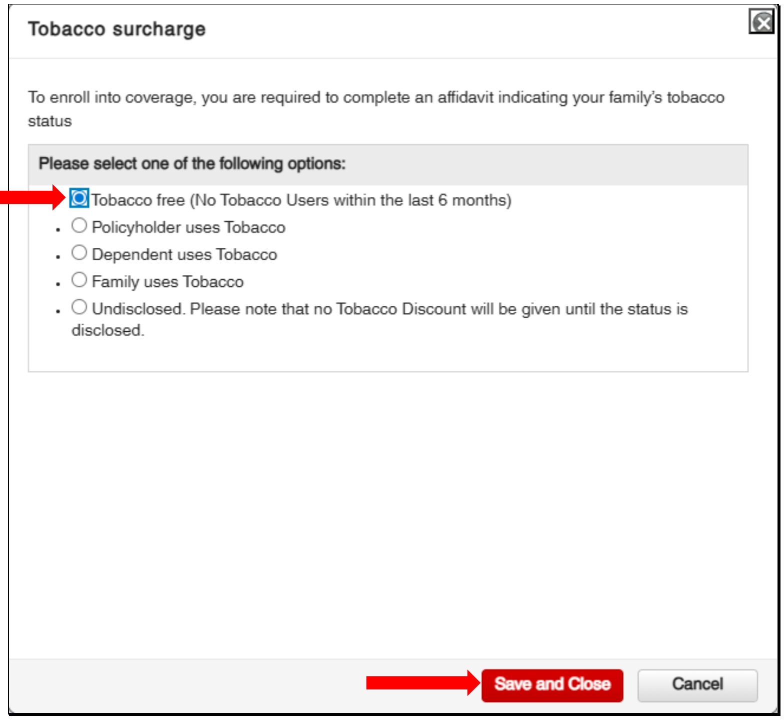




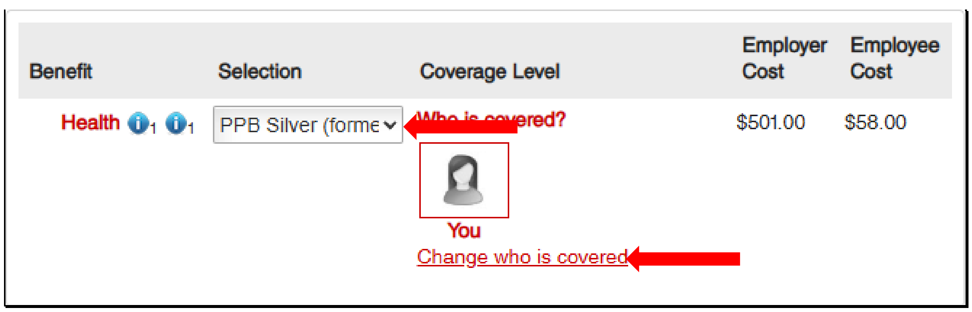
11. Type the provider ID number in the **PCP ID** field, and then click the **Save and Close** button.
    This information may not be known, and the member may add this later.
12. Scroll down to the **Discounts and Surcharges** section.
    The Tobacco Surcharge information is required.



13. Click the **Complete affidavit** button.
    The Tobacco Surcharge window opens.

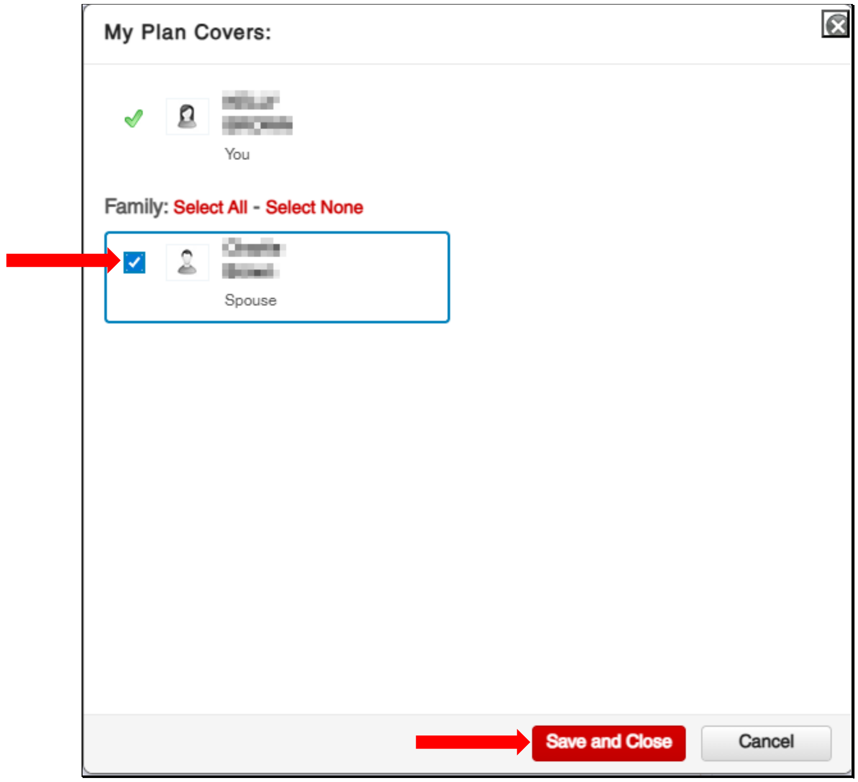


14. Select an option for family's smoking status, and click the **Save and Close** button.

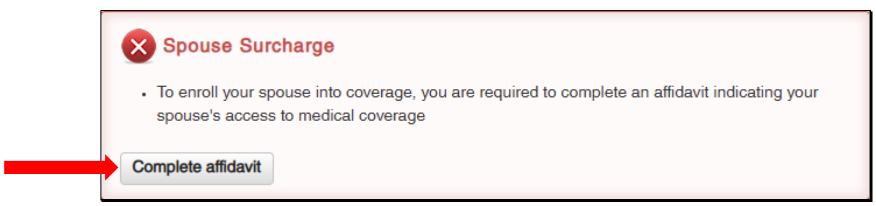


15. In the **Benefit** section, click the drop-down arrow in the **Selection** field, and choose a plan.

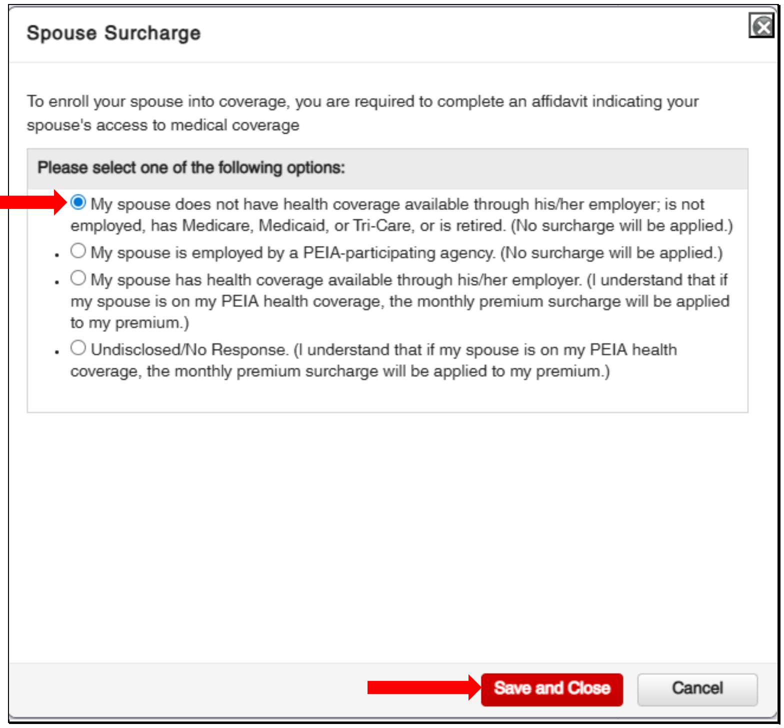
16. Click the **Change who is covered** link.
    The My Plan Covers: window opens.



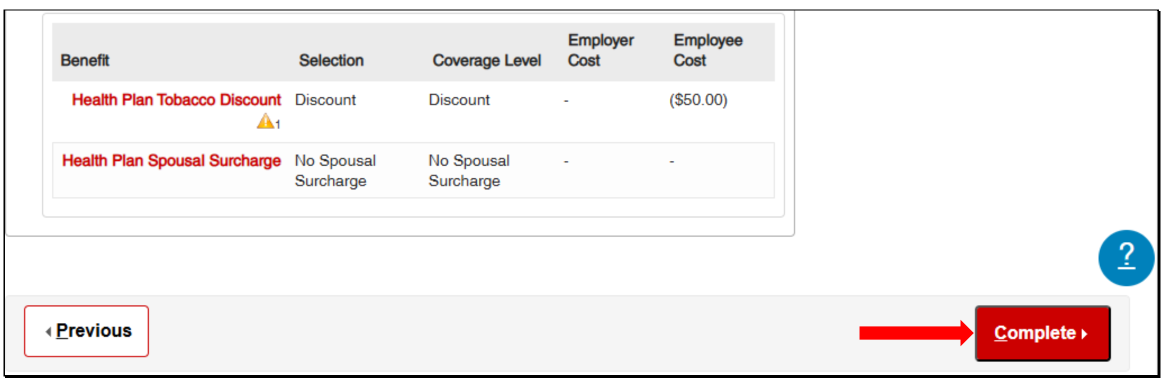
17. Click the **checkbox** for the spouse, and then click the **Save and Close** button.
    The spouse displays as covered in the Health benefit, but now a Spouse Surcharge section displays.



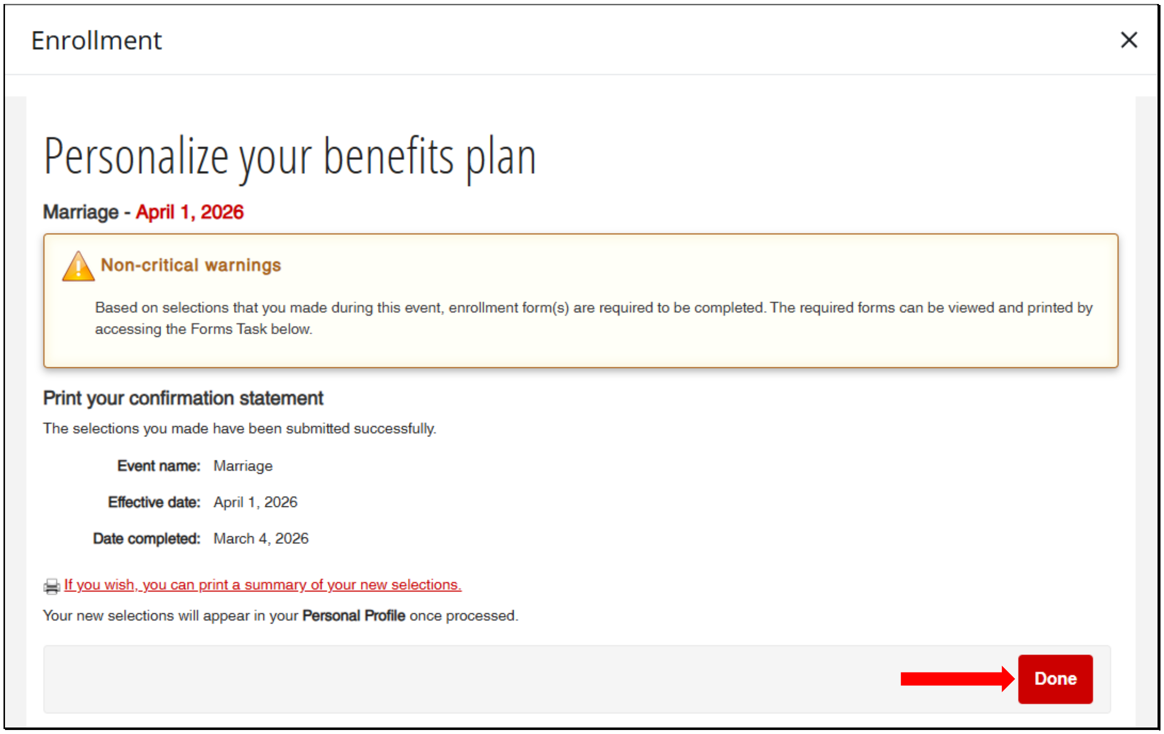
18. Click the **Complete affidavit** button.
    The Spouse Surcharge window opens.



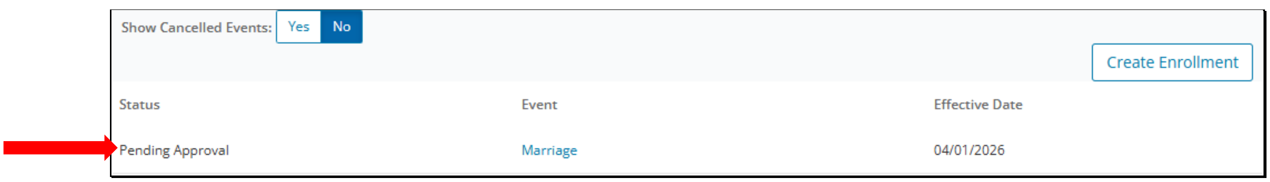
19. Select the appropriate option, and then click the **Save and Close** button.



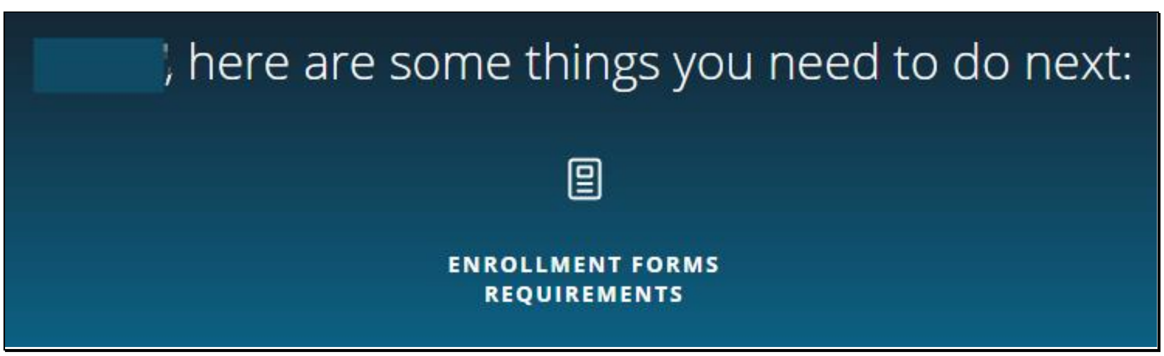
20. Scroll to the bottom of the Enrollment window, and click the **Complete** button.
    The confirmation window displays.



21. Click the **Done** button to finish.
    The Enrollment History screen shows the new event with a Pending Approval status.



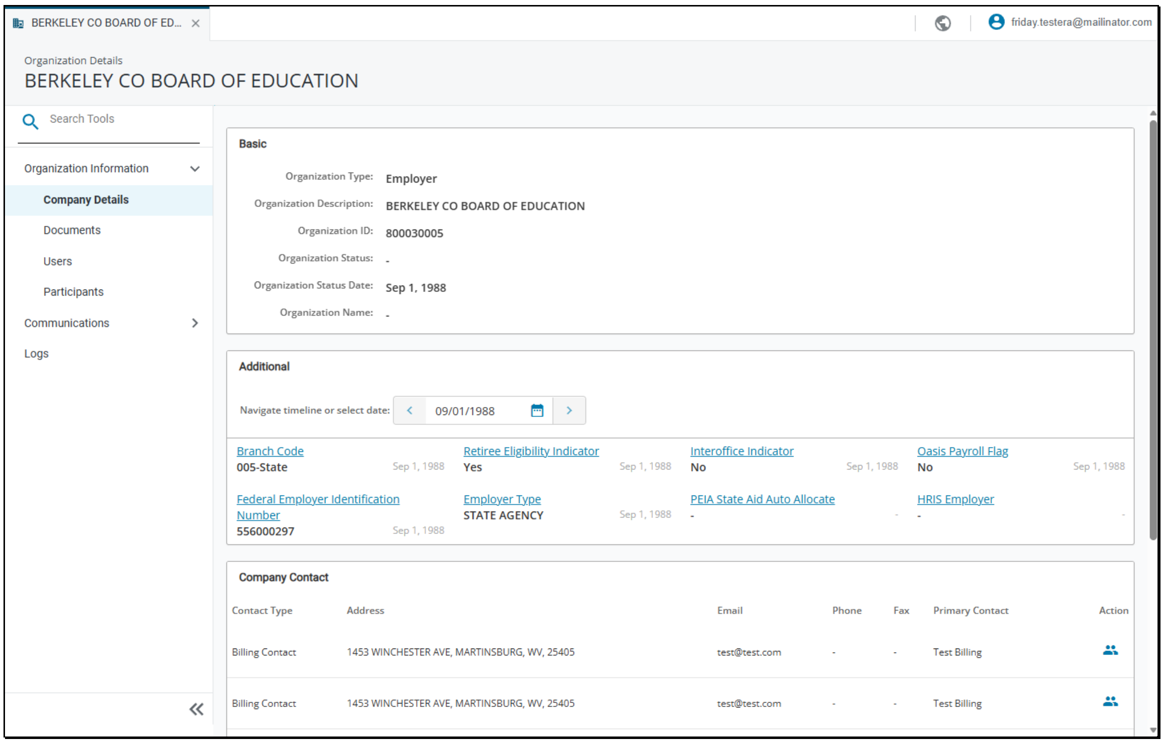
When the member logs into the Member Portal, the Call to Action banner prompts for uploading the required forms, including a Marriage Certificate.



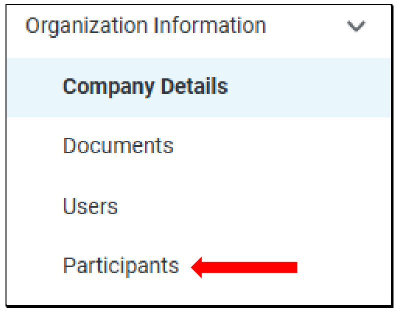
8 My Organization

My Organization allows an administrator to view employer details, participants, and administrative users.

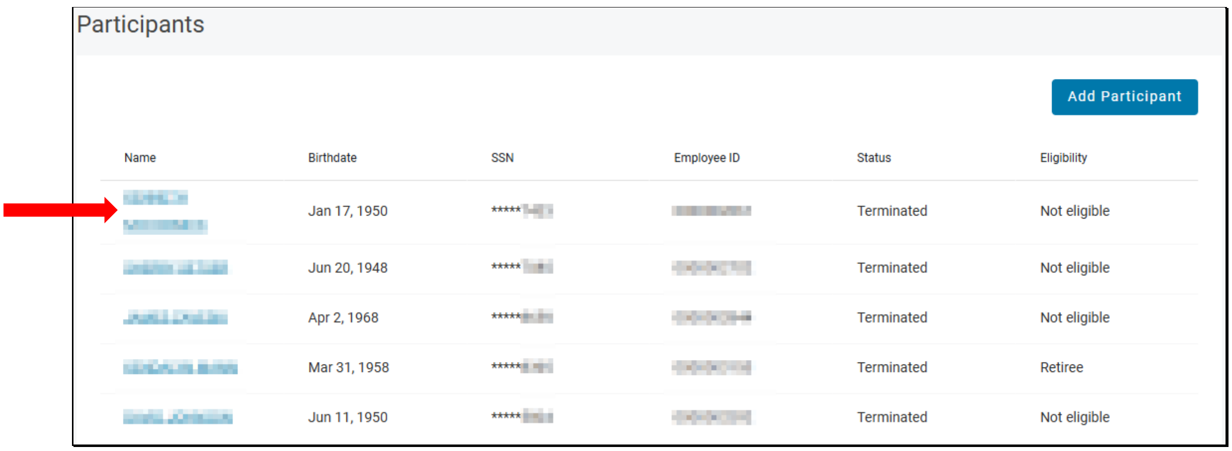
1. Click **My Organization** on the left navigation menu.
   The Organization Details screen displays, with **Company Details** selected.



Explore the other menu options:



2. Click **Participants** on the organization navigation menu.
   The list of the organization's participants displays.



Note that each participant's name in the **Name** column is a link, which may be used to access the participant's Participant Profile.

Column headings may be used to change the sort order. For example, to arrange the participants alphabetically by first name:

3. Click the heading of the **Name** column.
   An arrow next to the heading points up to indicate ascending order.

4. Click the arrow next to the **Name** heading.
   The arrow points down to indicate descending order.

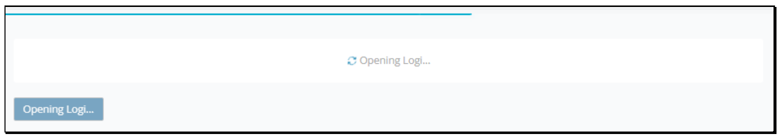
5. Click the arrow next to **Last Name** once more to restore the alphabetical order.

Similar functionality is available for the **Users** tab. (User Management is covered in a later section.)

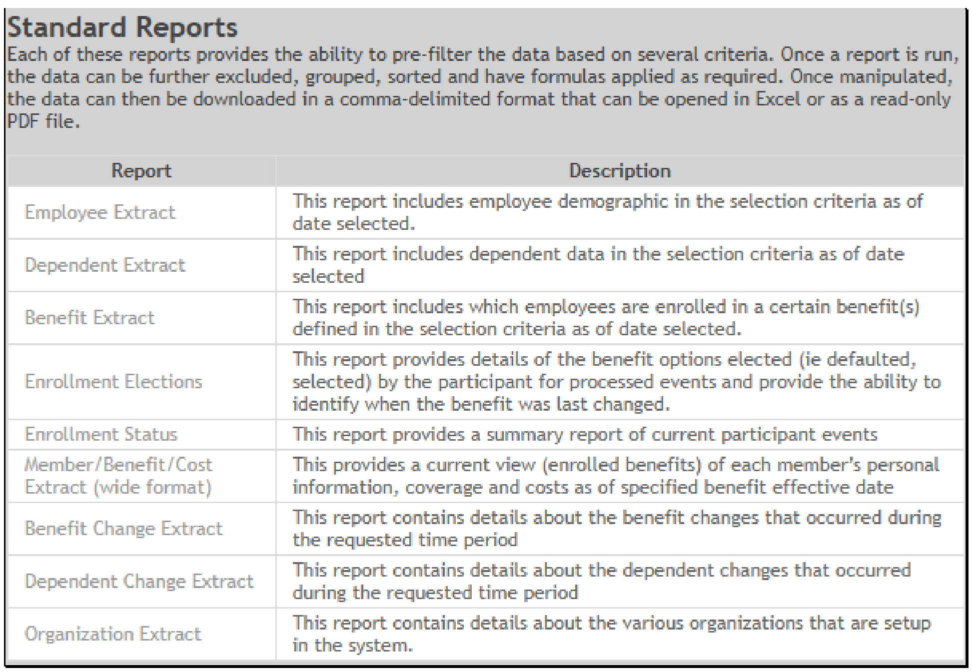
9 Plan Reporting

Reports are available for employers.

1. Click **Plan Reporting** on the left menu.
   The Reports screen begins to open.



Logi is the name of the application used for reporting within the system, and you will see the Logi name displayed as the Reports menus open.



Standard Reports

Each of these reports provides the ability to pre-filter the data based on several criteria. Once a report is run, the data can be further excluded, grouped, sorted and have formulas applied as required. Once manipulated, the data can then be downloaded in a comma-delimited format that can be opened in Excel or as a read-only PDF file.

Report	Description
Employee Extract	This report includes employee demographic in the selection criteria as of date selected.
Dependent Extract	This report includes dependent data in the selection criteria as of date selected
Benefit Extract	This report includes which employees are enrolled in a certain benefit(s) defined in the selection criteria as of date selected.
Enrollment Elections	This report provides details of the benefit options elected (ie defaulted, selected) by the participant for processed events and provide the ability to identify when the benefit was last changed.
Enrollment Status	This report provides a summary report of current participant events
Member/Benefit/Cost Extract (wide format)	This provides a current view (enrolled benefits) of each member's personal information, coverage and costs as of specified benefit effective date
Benefit Change Extract	This report contains details about the benefit changes that occurred during the requested time period
Dependent Change Extract	This report contains details about the dependent changes that occurred during the requested time period
Organization Extract	This report contains details about the various organizations that are setup in the system.

A menu of **Standard Reports** is available to all users. When running an employee-based report, such as Employee Extract, the report's contents will be limited to only those workers within each employer's division.

Billing Reports

Report	Description
Adjustment Report	Adjustment Report
Aged Receivables	Aged Receivables
Invoice Totals	Invoice Totals
Carrier Roster Report	Extract all billing transactions for an invoice date or coverage begin date for selected carrier(s)
Carrier Variance Report	Extract billing information for selected invoice dates and compare the data in order to determine the variance.
Coverage vs Carrier Headcount Totals	Extract item headcount information for selected carriers and/or pay groups (if applicable) and headcount by coverage under those item(s) for a selected invoice date.
Details by Carrier/Pay Group Report	Extract details of all billing items invoiced or adjusted for an invoice date or coverage begin date for selected carrier(s) and/or pay group(s).
Entity Master List	Entity Master List
Entity Summary List	Entity Summary List
Invoice Amount Due Threshold	Invoice Amount Due Threshold
Payments Register	Payments Register
Pending/Partially Allocated Payments and Credits	Pending/Partially Allocated Payments and Credits
Ratio of Prebill to Prior Month Bill	Ratio of Prebill to Prior Month Bill
Summary by Carrier/Pay Group	Extract totals for all billing items invoiced or adjusted for an invoice date or coverage begin date for selected carrier(s) and/or pay group(s).

Workflow Reports

Report	Description
Workflow Status Report	This report lists workflow statuses by Business Process for selected date range

Bookmarks

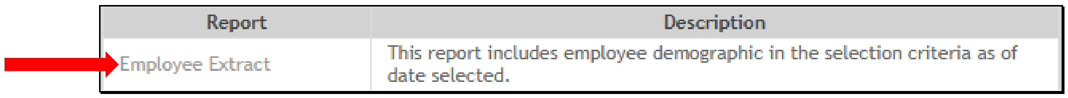
Bookmarks provide the user the ability to retrieve copies of reports previously run with all the selection criteria, grid layouts and formats remaining intact. Each Standard Report provides a 'Save' link that when clicked will prompt the user for a Bookmark name to save the report under. The saved report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

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

Users with Billing rights functionality will see the **Billing Reports** section. All users will see the **Workflow Reports** and **Bookmarks** sections.

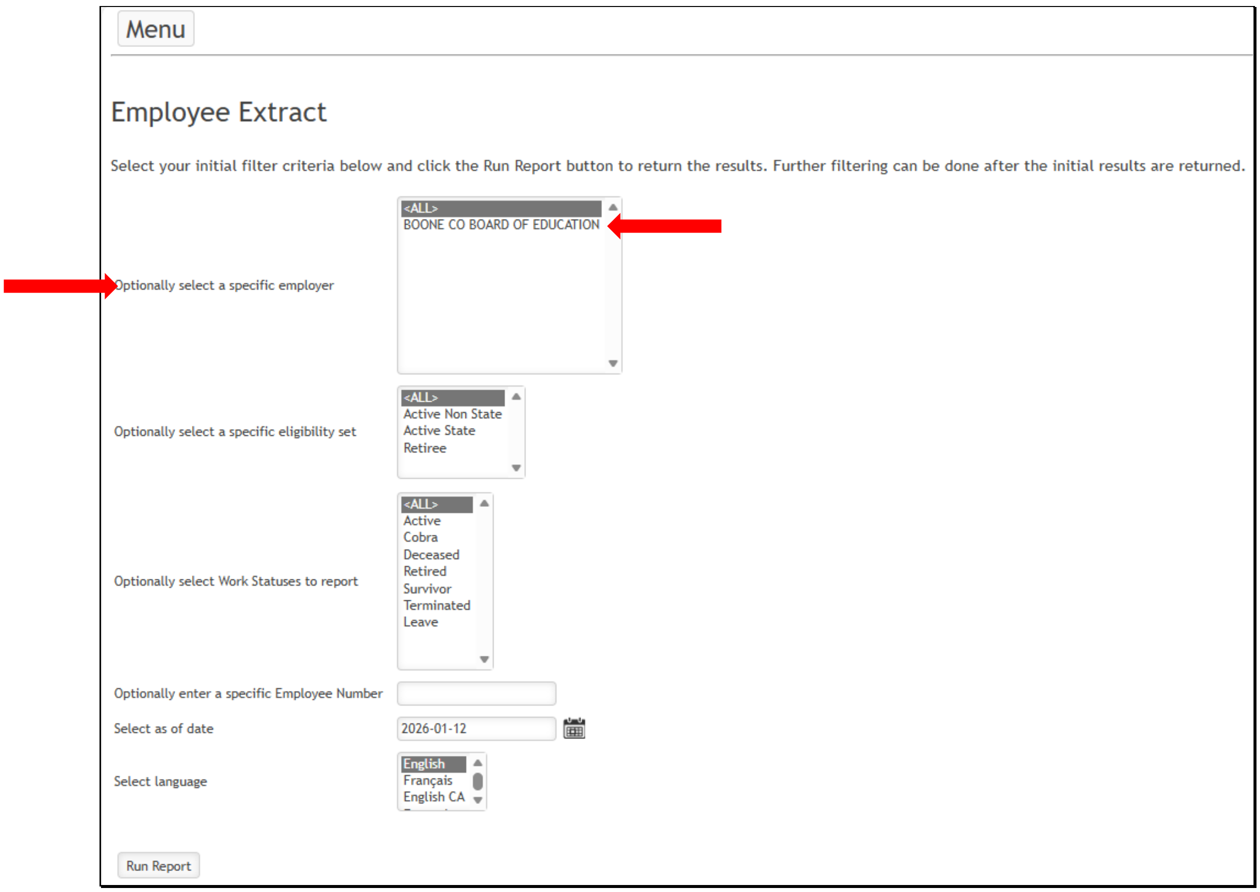
9.1 Standard Reports – Employee Extract

The first of the Standard Reports, Employee Extract, includes participant demographic data for the employment status(es) of date selected.



Report	Description
Employee Extract	This report includes employee demographic in the selection criteria as of date selected.

1. Select **Employee Extract** on the Report menu.
   The Employee Extract Menu screen displays.

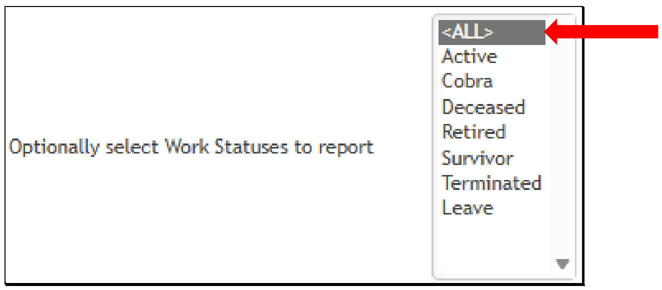


Note the **Optionally select a specific employer** field: PEIA Administrative users will see all divisions, but Employer users see only the ones assigned to their divisions. If an Employer has access to multiple divisions, each one will be available here for selection.

2. Select a set name in the **Eligibility** field.
   All is the default, used in this example.

You may click on one set to select it, or hold the keyboard's **Ctrl** key and click to make a multiple selection.

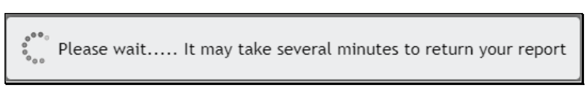
3. Select a code in the **Work Statuses** field.
   All is the default, used in this example.



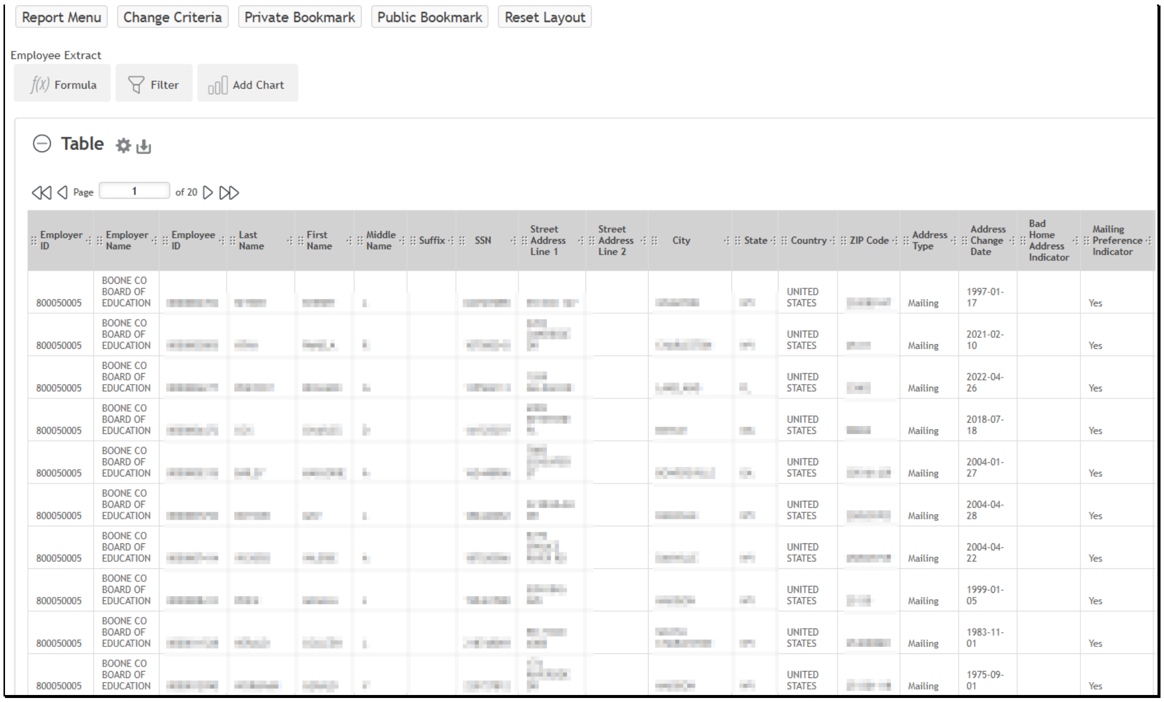
4. If running the report for one specific employee, enter the participant's ID in the **Specific Employee** field.
   Leave blank to include all employees of the previously selected eligibility and work status.

5. Click the calendar icon to select a date in the **Select as of date** field.
   The current date is the default.

6. Click the **Run Report** button.
   The report begins to process, and there will be a message on screen to indicate that it is running.



When the processing is complete, the report displays.



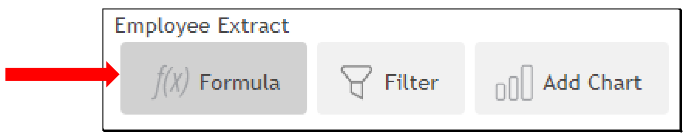
9.1.1 Report Menu, Change Criteria, and Reset Layout Buttons

The buttons at the top of the report screen perform the following functions:

- Report Menu – returns to the Standard Reports screen where a new report may be executed
- Change Criteria – returns to the parameter selection screen for the current report, allowing the opportunity to change parameters which may alter that output
- Private Bookmark – saves the current report settings as a Private Bookmark (demonstrated later)
- Public Bookmark – saves the current report settings as a Public Bookmark (demonstrated later)
- Reset Layout – removes all grouping, sorting, filters, etc. that were applied in the current report to allow new changes

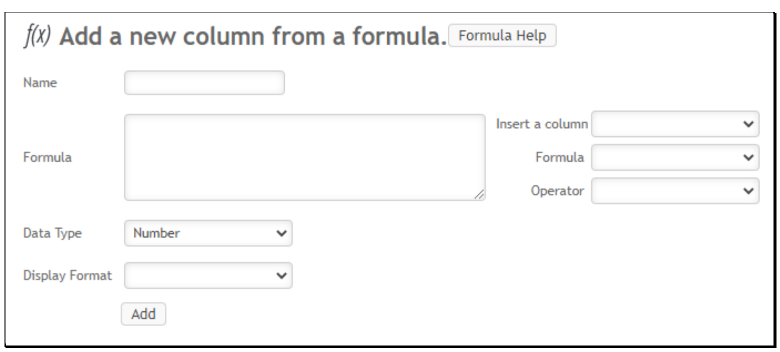
9.1.2 Formula, Filter, and Add Chart Buttons

The buttons directly above the report table provide additional data manipulation options. Main features include Formulas, Filters and Charting. Click one of these buttons as described below:



The Formula function adds a new column to the table that will be used to display the results of a calculation that you create. This calculation will be based on numeric entries in one or more other columns. (The Employee Extract report in the previous example does not lend itself to any calculations.)

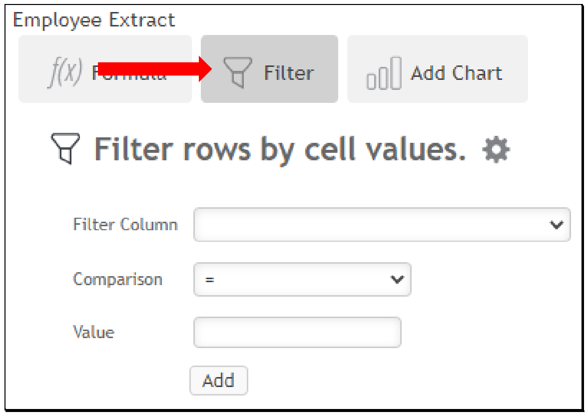
1. Click the **Formula** button.
   The Add a new column from a formula fields display.



2. Click the **Formula** button again to hide the fields from display.

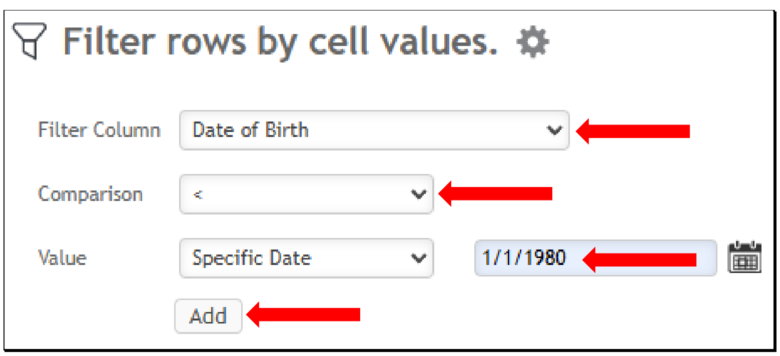
The Filter function allows for filtering the report with specific criteria.

1. Click the **Filter** button.
   The Filter rows by cell values fields display.

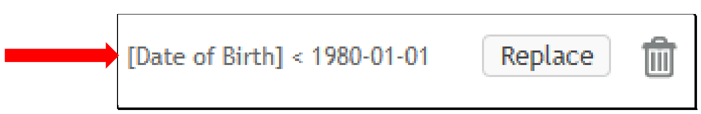


For example, filter the table to display only female participants born before 1980:

2. Click the drop-down arrow in the **Filter Column** field, and select **Date of Birth**.
   (New columns created for formulas may be used as filter columns too.)
3. Click the drop-down arrow in the **Comparison** field, and select **<** (less than sign).
4. With **Specific Date** showing in the **Value** field, type **1/1/1980** in the blank field to the right.
   You may also click the calendar icon and select the date from the calendar.

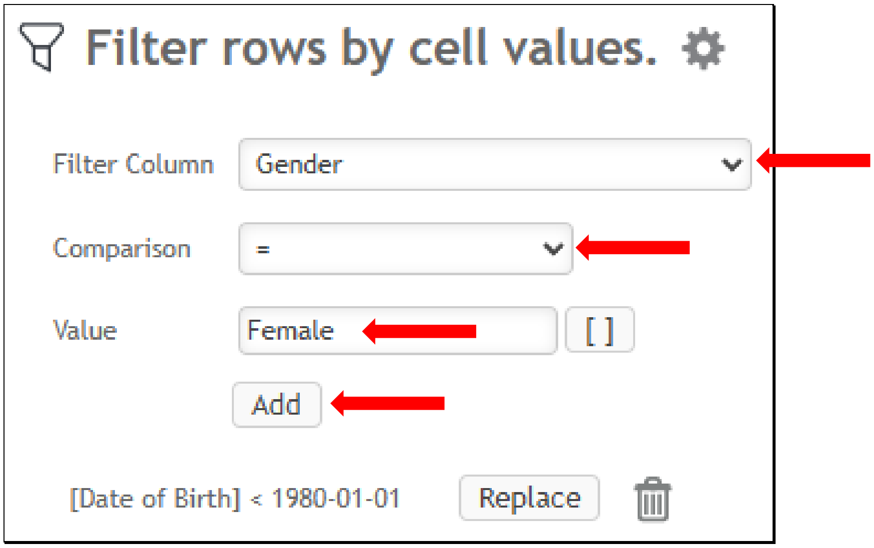


5. Click the **Add** button.
   The added criteria displays below the filter fields, and the table displays only those participant records that meet the filter criteria for Date of Birth.



Next, add the additional criteria for Gender:

6. Click the drop-down arrow in the **Filter Column** field, and select **Gender**.
7. Click the drop-down arrow in the **Comparison** field, and select **=** (equal sign).
8. Type **Female** in the **Value** field.



9. Click the **Add** button.
   The table displays only those participant records that meet the filter criteria for both Employee DOB and Gender. Note the **And** operator between the criteria.

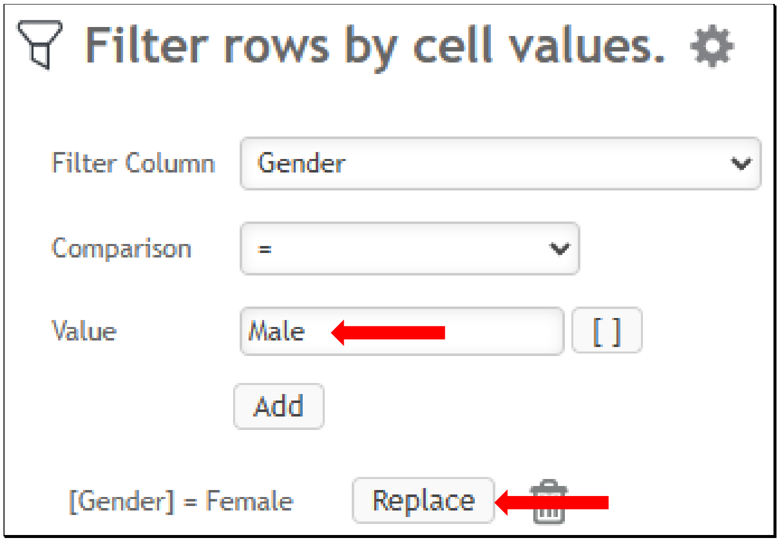
To remove one of the current filters:

10. Click the **Remove** (trash can) icon on one of the displayed filters.
    The system requires you to confirm this choice in a pop-up window.

11. Click the **OK** button.

To change a filter, for example, change the display for Male participants only:

12. Type **Male** in the **Value** field.



13. Click the **Replace** button.
    The system requires you to confirm this choice in a pop-up window.

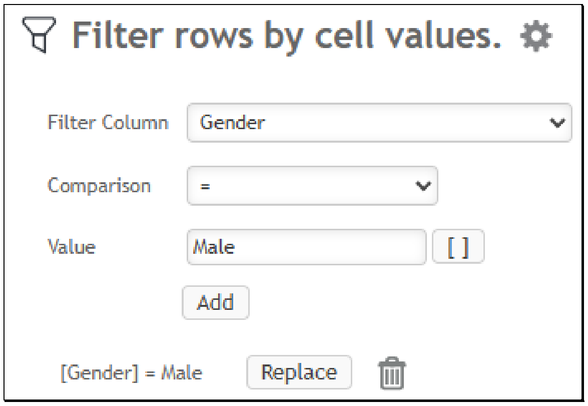
14. Click the **OK** button.
    The table redisplays with the new criteria in place.

15. Click the **Filter** button to hide the display of the Filter fields if necessary.
    Click it again when necessary to redisplay the Filter fields.

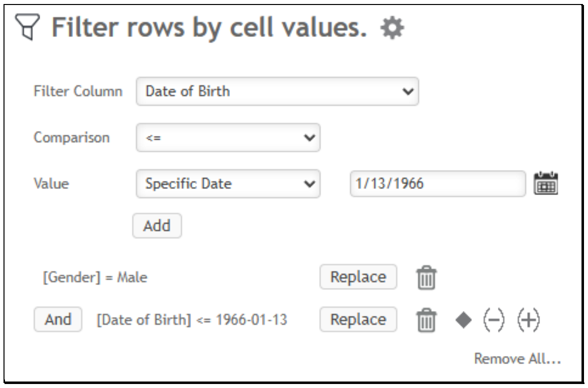
In the previous filter example, the Gender and Employee DOB fields were linked due to the **And** operator in use. However, this operator may be switched to **Or** for comparing two different possible outcomes.

In this example, use the Or operator to build a filter to show Males over 60 or Females over 30.

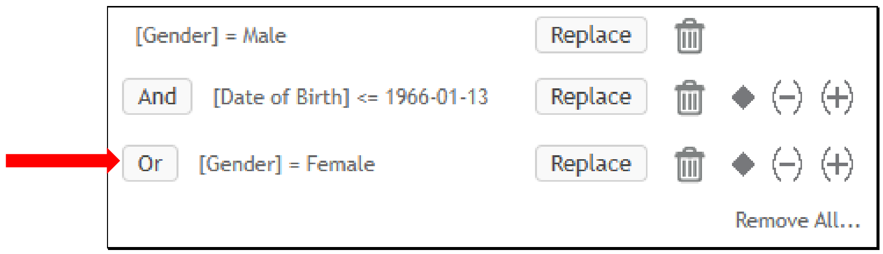
1. Click the **Filter** button.
2. Click the drop-down arrow in the **Filter Column** field, and select **Gender**.
3. Click the drop-down arrow in the **Comparison** field, and select **=** (equal sign).
4. Type **Male** in the **Value** field.
5. Click the **Add** button.



6. Click the drop-down arrow in the **Filter Column** field, and select **Date of Birth**.
7. Click the drop-down arrow in the Comparison field, and select **<=** (less than equal sign).
8. Enter the current date less 60 years in the second **Value** field.
9. Click the **Add** button.



10. Click the drop-down arrow in the **Filter Column** field, and select **Gender**.
11. Click the drop-down arrow in the **Comparison** field, and select **=** (equal sign).
12. Type **Female** in the **Value** field.
13. Click the **Add** button.



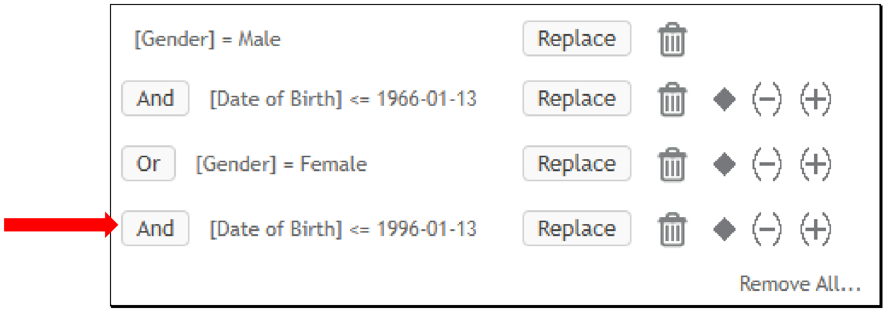
Note the **Or** button next to the second Gender criterion. The system placed the Or operator automatically since the Gender criterion had been used in this filter previously. Had it not been used already, it would have displayed as another **And** button, and in that case simply click the And button to convert it to an Or button.

Next, add the criteria for the females' age:

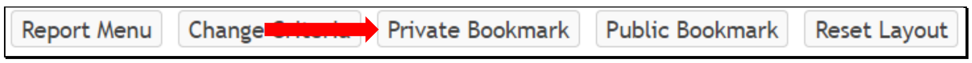
14. Click the drop-down arrow in the **Filter Column** field, and select **Date of Birth**.
15. Click the drop-down arrow in the Comparison field, and select **<=** (less than equal sign).
16. Enter the current date less 30 years in the second **Value** field.
17. Click the **Add** button.

In this example, selecting Date of Birth a second time results in the Or button too.

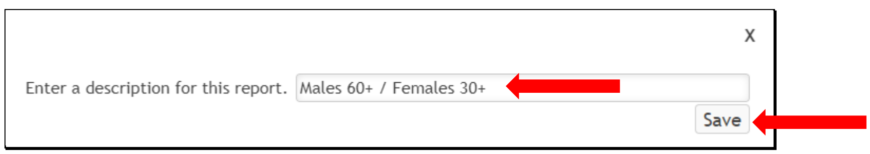
18. Click the **Or** button to convert it to an And operator.



Now the criteria is set to display males 60 years old or older *and* females 30 years old or older.



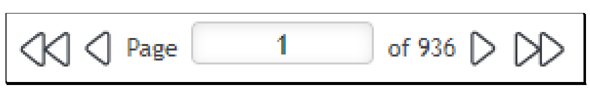
19. Click the **Private Bookmark** button at the top of the screen.
    This will be used in the Bookmarks section later.



20. Type a descriptive name for the report and click the **Save** button.

9.1.3 Table Control Buttons

If the report is more than one page, the arrow buttons appear directly above the table and are used for page navigation.

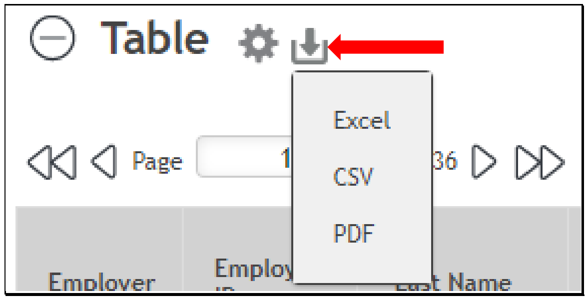


- Click the single right arrow to advance the display by one page
- Click the double right arrow to advance to the last page of the display
- Click the single left arrow to back up the display by one page
- Click the double left arrow to return to the first page of the display

The minus sign hides the display of the table.

- Click the minus sign to hide the table (minus sign replaced by a plus sign)
- Click the plus sign to redisplay the table

The downward arrow is used download or print the table.



- Click Excel or CVS to download the table to an Excel worksheet
- Click PDF to save the table as a read-only file

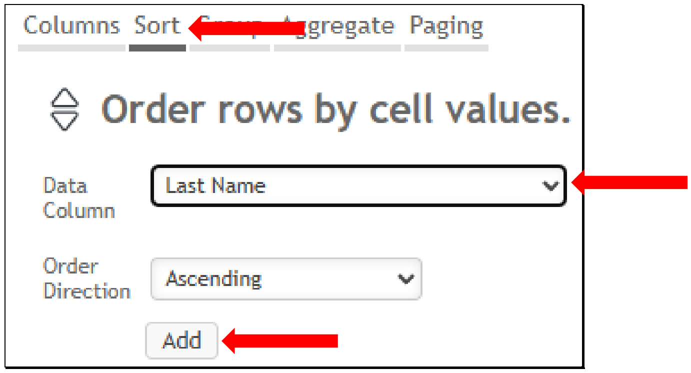
The gear wheel icon is used to open a Show/hide options menu with five additional commands for manipulating the table display.

1. Click the **Show/hide options** icon.
   The menu displays; Columns is the default option.

Column names with a check icon display in the table. To remove the display of the Employer ID and Employer Name columns (since they are all the same in this example):

2. Click the check icons on the **Employer ID** and **Employer Name** options, and click the **OK** button.
   The Employer ID and Employer Name columns are removed from the table display. Reverse the process (click the blank box next to Employer ID and Employer Name) to restore the columns to the display.

Sort allows for arranging the table rows in a specific order according to the contents of one or more columns. For example, change the table to alphabetical order by Last Name.



1. Click **Sort**.
   The Order rows by cell values fields display.

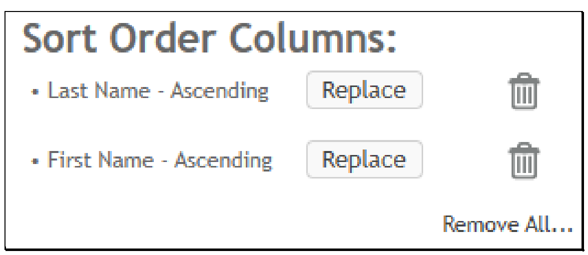
2. Click the drop-down arrow in the **Data Column** field, and select **Last Name**.
   Order Direction is defaulted to Ascending, which is alphabetical A-Z.

3. Click the **Add** button.
   The table redisplays the participant records in order by Last Name.

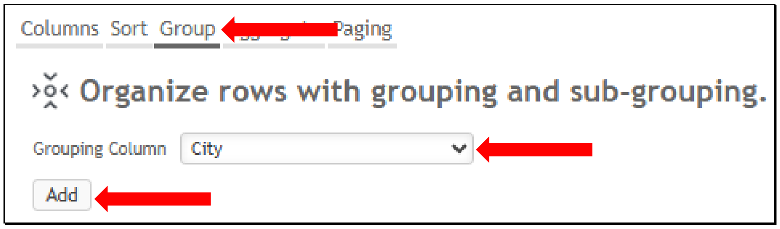
Continue the sort by adding Employee First Name to the order:

4. Click the drop-down arrow in the **Data Column** field, and select **First Name**.

5. Click the **Add** button.
   The table redisplays the participant records in order by Last Name and First Name.



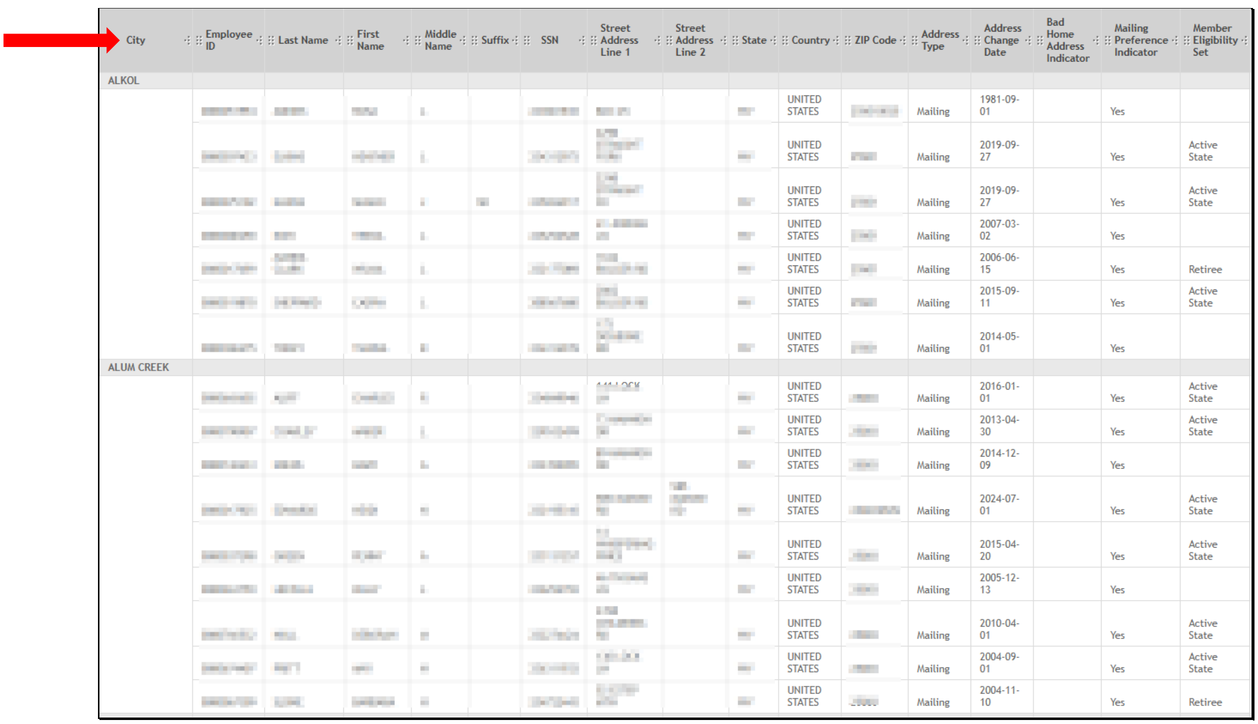
Group allows for organizing the table records based on desired criteria. This offers better views into key data elements and allows for aggregates on the grouped values. For example, group the participants by Employer.



1. Click **Group**.
   The Organize rows with grouping and sub-grouping fields display.

2. Click the drop-down arrow in the **Grouping Column** field, and select **City**.

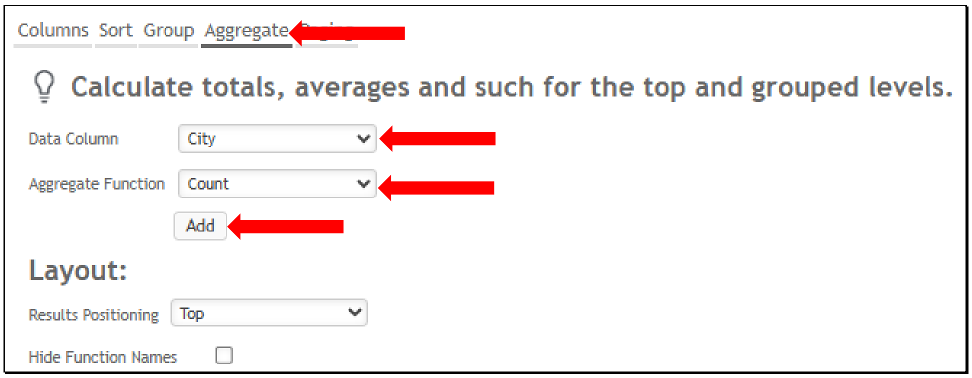
3. Click the **Add** button.
   The grouping column moves to the beginning of the table columns (if it was not there already), and the participant records are grouped by this column's entry in alphabetical order.



Aggregate allows for insertion of data aggregations in the table display. The aggregation options are like those available in Excel – Sum, Average, Standard Deviation, Count, Distinct Count, Minimum, Maximum, to name a few examples. You can identify if you wish to see the aggregate results at the top or bottom of the data set. The results will display the aggregate for the full data output as well as each grouping level where grouping has been added.

In the following example, only the City and Last Name columns are displayed. All other columns have been hidden via the Columns option. These steps will show a count of each Employer, and which participants belong to each status.

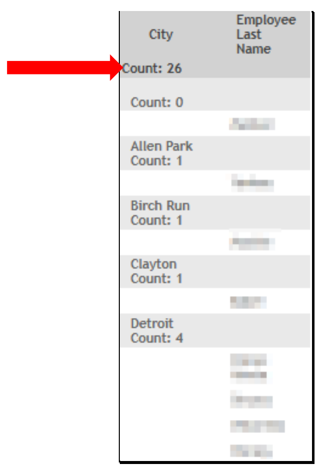
1. Click **Aggregate**.
   The Calculate totals, averages and such for the top and grouped levels fields display.



2. Click the drop-down arrow in the **Data Column** field, and select **City**.

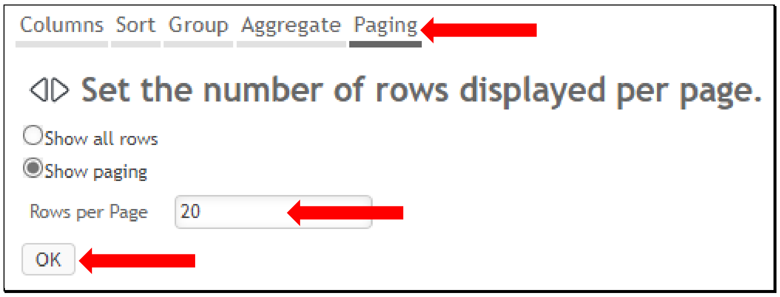
3. Click the drop-down arrow in the **Aggregate Function** field, and select **Count**.

4. Click the **Add** button.
   The table displays the count of each Employer at the top of each group.



Paging allows for controlling the number of rows to appear on the PC screen. You can show all rows or add paging to control the display by a custom number. By default, the output will be restricted to 50 rows per page. Displaying all rows may impact page performance.

1. Click **Paging**.
   The Set the number of rows displayed per page fields display.



2. Type a new value in the **Rows per Page** field.

3. Click the **OK** button.

9.2 Additional Standard Reports

Standard Reports

Each of these reports provides the ability to pre-filter the data based on several criteria. Once a report is run, the data can be further excluded, grouped, sorted and have formulas applied as required. Once manipulated, the data can then be downloaded in a comma-delimited format that can be opened in Excel or as a read-only PDF file.

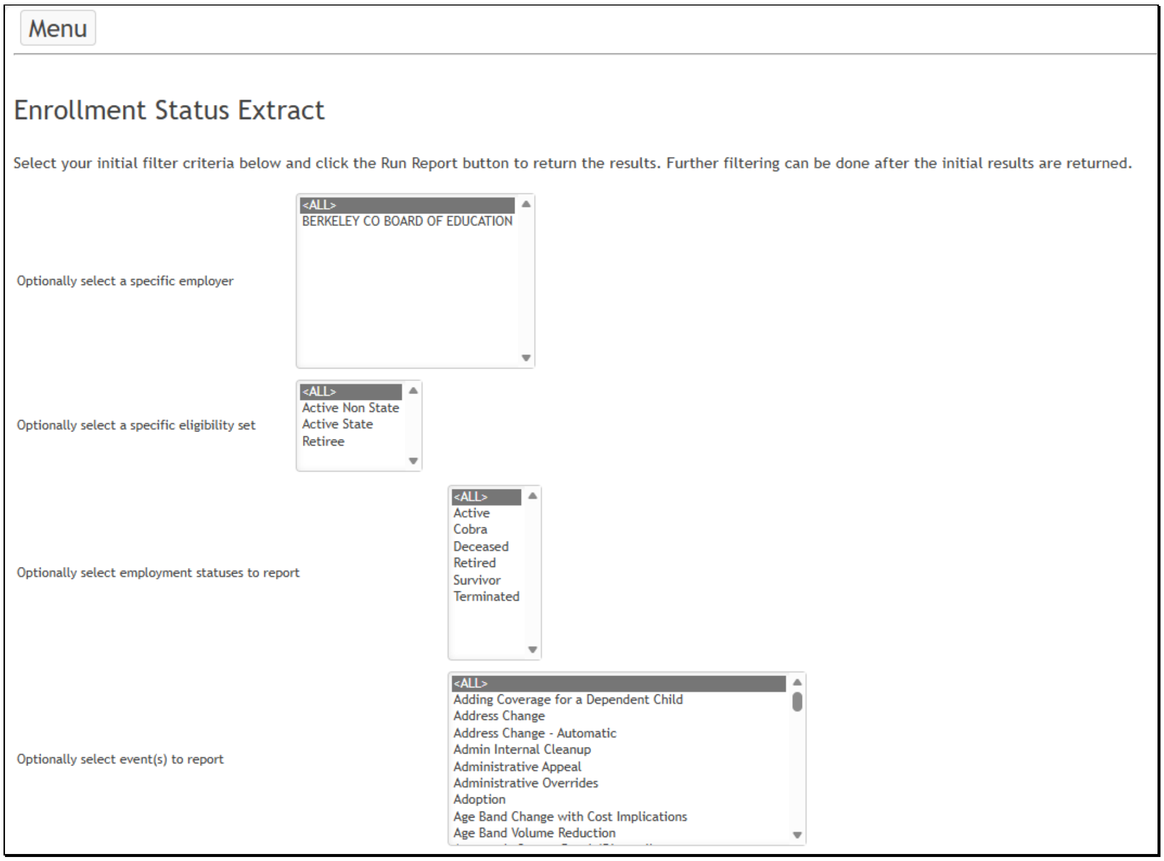
Report	Description
Employee Extract	This report includes employee demographic in the selection criteria as of date selected.
Dependent Extract	This report includes dependent data in the selection criteria as of date selected
Benefit Extract	This report includes which employees are enrolled in a certain benefit(s) defined in the selection criteria as of date selected.
Enrollment Elections	This report provides details of the benefit options elected (ie defaulted, selected) by the participant for processed events and provide the ability to identify when the benefit was last changed.
Enrollment Status	This report provides a summary report of current participant events
Member/Benefit/Cost Extract (wide format)	This provides a current view (enrolled benefits) of each member's personal information, coverage and costs as of specified benefit effective date
Benefit Change Extract	This report contains details about the benefit changes that occurred during the requested time period
Dependent Change Extract	This report contains details about the dependent changes that occurred during the requested time period
Organization Extract	This report contains details about the various organizations that are setup in the system.

Experiment with the rest of the Standard Reports. The mechanics of running each report are similar to the ones in the previous example.

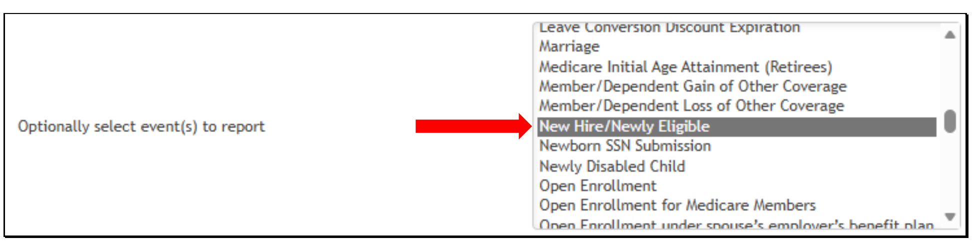
9.2.1 Enrollment Status Extract

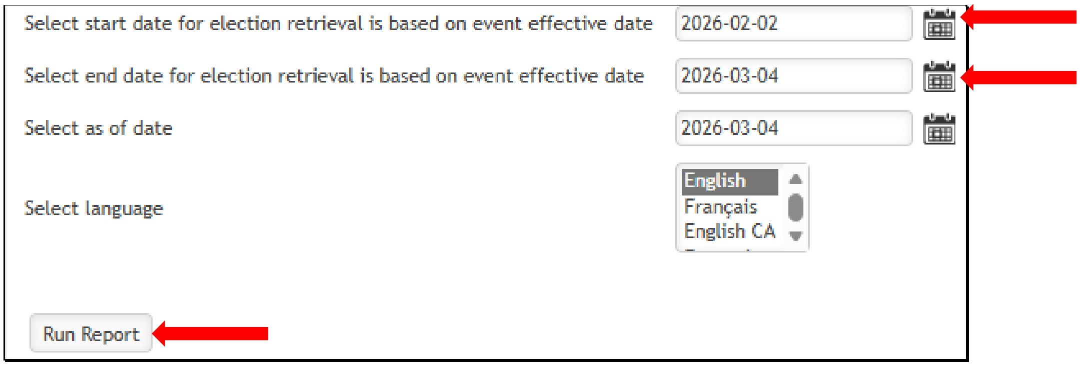
Use the Enrollment Status report to track new hires into your organization.

1. Select **Enrollment Status** on the Report menu.
   The Enrollment Status Extract Menu screen displays.



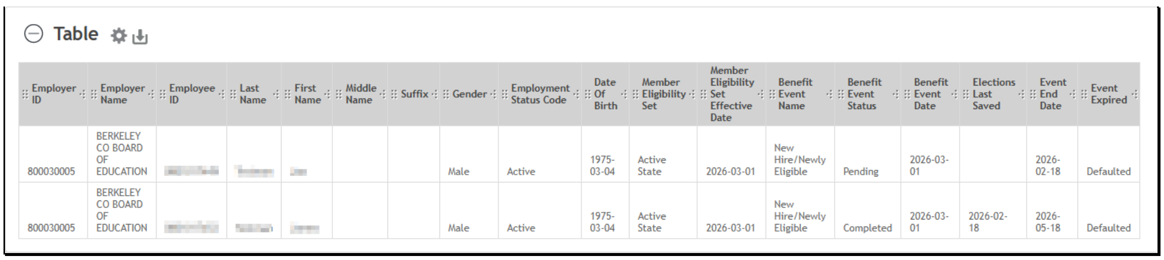
2. Select **New Hire/Newly Eligible** in the **Optionally select event(s) to report** field.





The defaults for the start and end dates for election retrieval reflect the previous month; these dates may be changed if necessary.

3. Click the **Run Report** button.

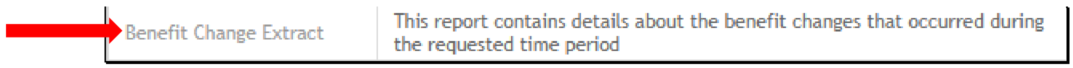


Table

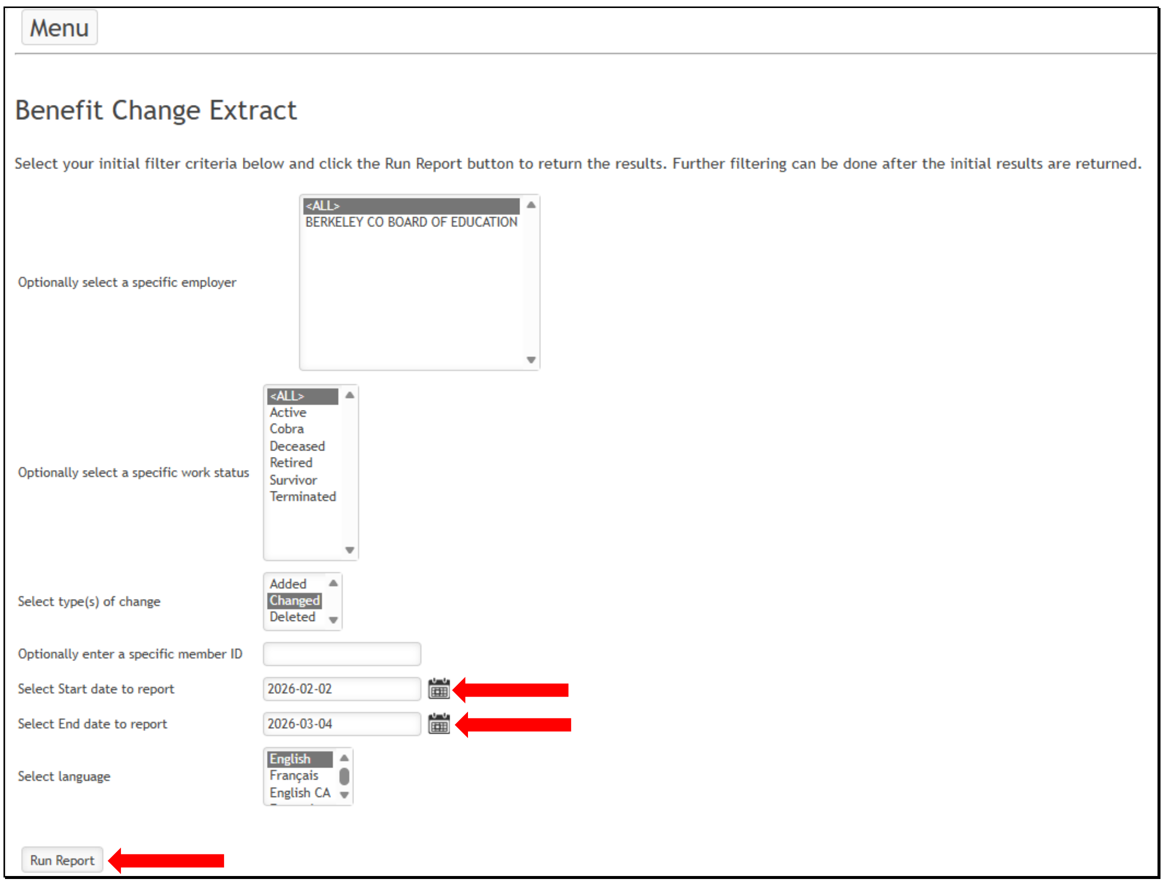
Employer ID	Employer Name	Employee ID	Last Name	First Name	Middle Name	Suffix	Gender	Employment Status Code	Date Of Birth	Member Eligibility Set	Member Eligibility Set Effective Date	Benefit Event Name	Benefit Event Status	Benefit Event Date	Elections Last Saved	Event End Date	Event Expired
800030005	BERKELEY CO BOARD OF EDUCATION	[illegible]	[illegible]	[illegible]			Male	Active	1975-03-04	Active State	2026-03-01	New Hire/Newly Eligible	Pending	2026-03-01		2026-02-18	Defaulted
800030005	BERKELEY CO BOARD OF EDUCATION	[illegible]	[illegible]	[illegible]			Male	Active	1975-03-04	Active State	2026-03-01	New Hire/Newly Eligible	Completed	2026-03-01	2026-02-18	2026-05-18	Defaulted

9.2.2 Benefit Change Extract

Use the Benefit Change Extract report to show any changes to your employees' benefit enrollments for a selected time period.



1. Select **Benefit Change Extract** on the Report menu.
   The Benefit Change Extract Menu screen displays.



The defaults for the start and end dates to report reflect the previous month; these dates may be changed if necessary.

2. Click the **Run Report** button.

Table

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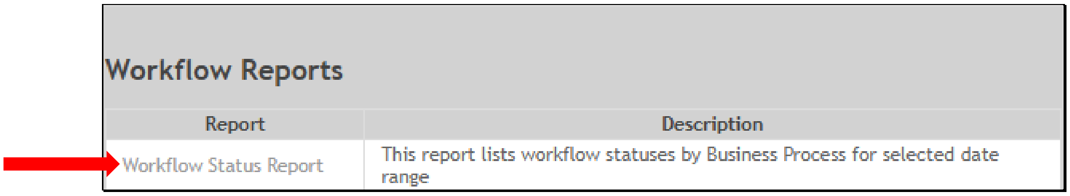
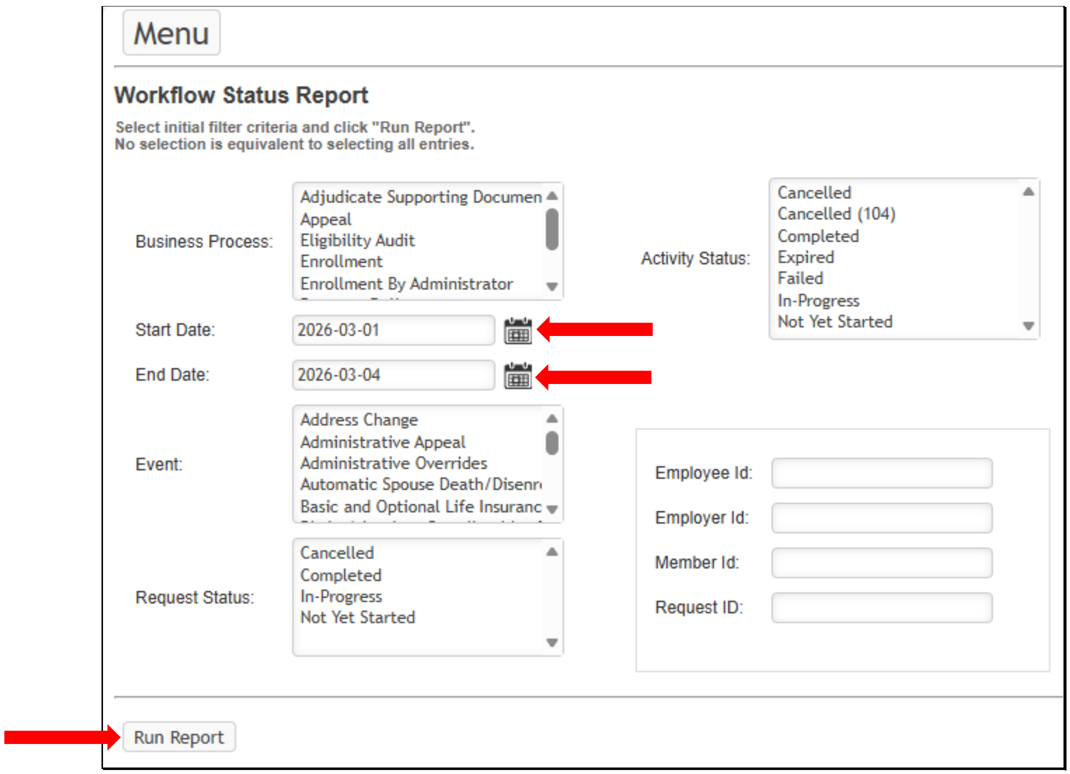
Employer ID	Employer Name	Employee ID	First Name	Last Name	Suffix	Employment Status Code	Benefit Event Name	Effective Date of the Change	Benefit - Prior	Plan - Prior	Option - Prior	Amount In Force - Prior	Amount pended - Prior	Employer Premium - Prior	Premium - Prior	Benefit - New	Plan - New	Option - New
800030005	BERKELEY CO BOARD OF EDUCATION	[redacted]	[redacted]	[redacted]		Active	Conversion	1996-12-01	Health	Inactive Prior Plan	Employee Only	0	0	0	0	Health	Inactive Prior Plan	Family
800030005	BERKELEY CO BOARD OF EDUCATION	[redacted]	[redacted]	[redacted]		Active	Conversion	1998-01-01	Health	Inactive Prior Plan	Family	0	0	0	0	Health	Inactive Prior Plan	Employee Only
800030005	BERKELEY CO BOARD OF EDUCATION	[redacted]	[redacted]	[redacted]		Active	Conversion	2001-07-01	Health	Inactive Prior Plan	Employee Only	0	0	0	0	Health	PPB Gold (formerly Plan A)	Employee Only
800030005	BERKELEY CO BOARD OF EDUCATION	[redacted]	[redacted]	[redacted]		Active	Conversion	2001-07-01	Health Plan Tobacco Discount	No Discount	No Discount	0	0	0	0	Health Plan Tobacco Discount	Discount	Discount
800030005	BERKELEY CO BOARD OF EDUCATION	[redacted]	[redacted]	[redacted]		Active	Conversion	2002-03-14	Health	PPB Gold (formerly Plan A)	Employee Only	0	0	0	0	Health	PPB Gold (formerly Plan A)	Employee + Children
800030005	BERKELEY CO BOARD OF EDUCATION	[redacted]	[redacted]	[redacted]		Active	Conversion	2003-01-01	Optional Life and AD&D Insurance	Optional Life and AD&D Insurance	$20,000	0	0	0	0	Optional Life and AD&D Insurance	Optional Life and AD&D Insurance	$50,000
800030005	BERKELEY CO BOARD OF EDUCATION	[redacted]	[redacted]	[redacted]		Active	Conversion	2003-04-01	Optional Life and AD&D Insurance	Optional Life and AD&D Insurance	$50,000	0	0	0	0	Optional Life and AD&D Insurance	Optional Life and AD&D Insurance	$150,000
800030005	BERKELEY CO BOARD OF EDUCATION	[redacted]	[redacted]	[redacted]		Active	Conversion	2007-01-01	Optional Life and AD&D Insurance	Optional Life and AD&D Insurance	$150,000	0	0	0	0	Optional Life and AD&D Insurance	Optional Life and AD&D Insurance	$200,000

9.3 Workflow Reports

Use the Workflow Status Report to show current business processes.



1. Select **Workflow Status Report** on the Report menu.
   The Workflow Status Menu screen displays.



The Start Date and End Date fields reflect the current month; change these fields as necessary.

2. Click the **Run Report** button.

Workflow Status Report

f(x) Formula | Filter | Add Chart

Table

Event	Business Process	Request ID	Request Status	Activity	Activity Status	Start Date	End Date	Outcome	Completed By	Name	Employer ID	Employee ID	Member ID
Birth, Adoption, Guardianship, Court Ordered Child	Enrollment	618342	In-Progress	Start Enrollment	Completed	2026-02-19 14:06	2026-02-19 14:06			[illegible]	800030005	[illegible]	[illegible]
Birth, Adoption, Guardianship, Court Ordered Child	Enrollment	618342	In-Progress	Submit Enrollment	Completed	2026-02-19 14:08	2026-02-19 14:08			[illegible]	800030005	[illegible]	[illegible]
Birth, Adoption, Guardianship, Court Ordered Child	Enrollment	618342	In-Progress	Waiting for Required Documents	Completed	2026-02-19 14:08	2026-02-19 14:08			[illegible]	800030005	[illegible]	[illegible]
Birth, Adoption, Guardianship, Court Ordered Child	Enrollment	618342	In-Progress	Request for Information initiated	Completed	2026-02-19 14:08	2026-02-19 14:08			[illegible]	800030005	[illegible]	[illegible]
Birth, Adoption, Guardianship, Court Ordered Child	Enrollment	620413	In-Progress	Start Enrollment	Completed	2026-02-26 10:06	2026-02-26 10:06			[illegible]	800030005	[illegible]	[illegible]
Birth, Adoption, Guardianship, Court Ordered Child	Enrollment	620413	In-Progress	Submit Enrollment	Completed	2026-02-26 10:30	2026-02-26 10:30			[illegible]	800030005	[illegible]	[illegible]
Birth, Adoption, Guardianship, Court Ordered Child	Enrollment	620413	In-Progress	Waiting for Required Documents	Completed	2026-02-26 10:30	2026-02-26 10:30			[illegible]	800030005	[illegible]	[illegible]
Birth, Adoption, Guardianship, Court Ordered Child	Enrollment	620413	In-Progress	Request for Information initiated	Completed	2026-02-26 10:30	2026-02-26 10:30			[illegible]	800030005	[illegible]	[illegible]
Birth, Adoption, Guardianship, Court Ordered Child	Enrollment	620413	In-Progress	Document Received	Completed	2026-02-26 10:36	2026-02-26 10:36			[illegible]	800030005	[illegible]	[illegible]
Birth, Adoption, Guardianship, Court Ordered Child	Enrollment	620413	In-Progress	Document accepted	Completed	2026-02-26 10:36	2026-02-26 10:36			[illegible]	800030005	[illegible]	[illegible]
Birth, Adoption, Guardianship, Court Ordered Child	Enrollment	620420	In-Progress	Start Enrollment	Completed	2026-02-26 14:01	2026-02-26 14:01			[illegible]	800030005	[illegible]	[illegible]
Birth, Adoption, Guardianship, Court Ordered Child	Enrollment	620420	In-Progress	Submit Enrollment	Completed	2026-02-26 14:38	2026-02-26 14:38			[illegible]	800030005	[illegible]	[illegible]
Birth, Adoption, Guardianship, Court Ordered Child	Enrollment	620420	In-Progress	Waiting for Required Documents	Completed	2026-02-26 14:38	2026-02-26 14:38			[illegible]	800030005	[illegible]	[illegible]
Birth, Adoption, Guardianship, Court Ordered Child	Enrollment	620420	In-Progress	Request for Information initiated	Completed	2026-02-26 14:38	2026-02-26 14:38			[illegible]	800030005	[illegible]	[illegible]
Birth, Adoption, Guardianship, Court Ordered Child	Enrollment	620420	In-Progress	Document Received	Completed	2026-02-26 14:42	2026-02-26 14:42			[illegible]	800030005	[illegible]	[illegible]

9.4 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.

1. 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	Males 60+ / Females 30+	2024/03/29 02:35:50	

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

2. 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.

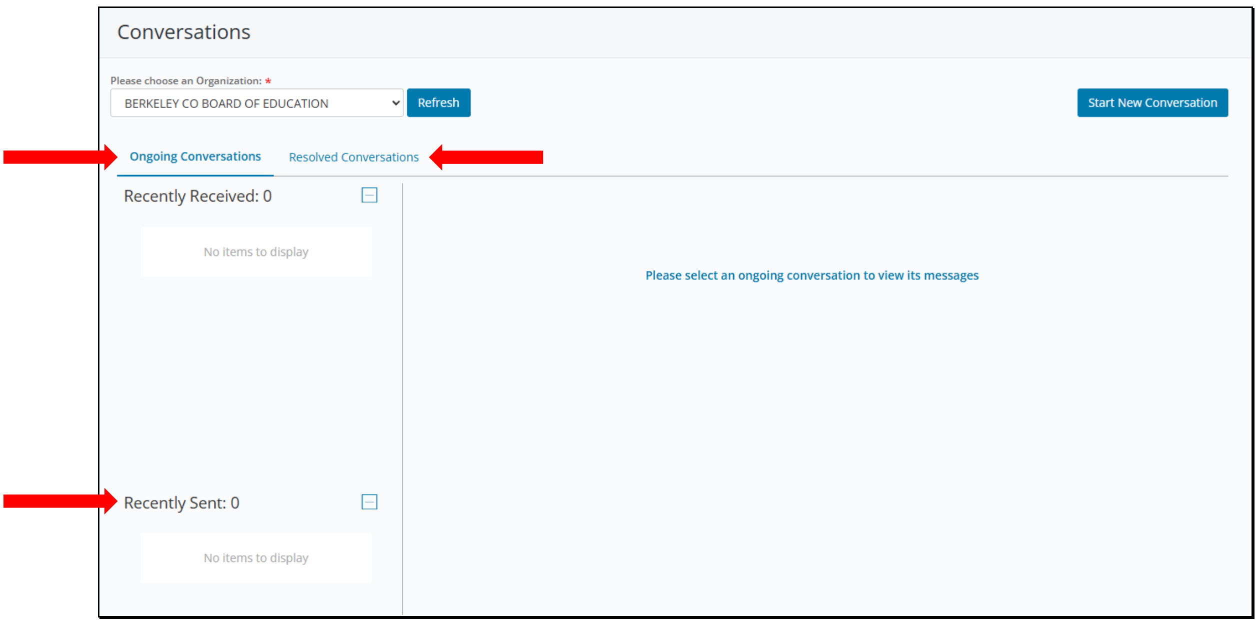
Public Bookmarks are available for all users, regardless of who created them.

10 Secure Messaging

Employers will communicate with PEIA Administration by means of secure messages. This function provides encryption and privacy not afforded by normal email messaging.

Creating a secure message in the Employer Portal begins with the **Conversations** function.

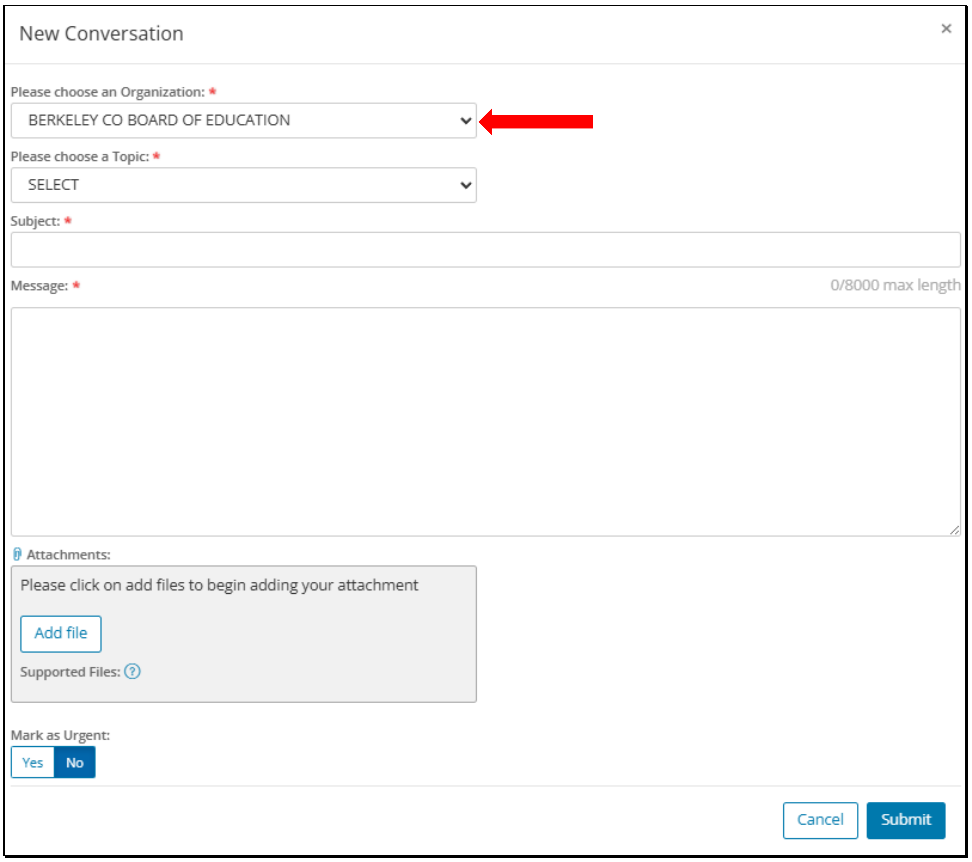
1. Click **Conversations** on the left navigation menu.
   The Conversations screen displays.



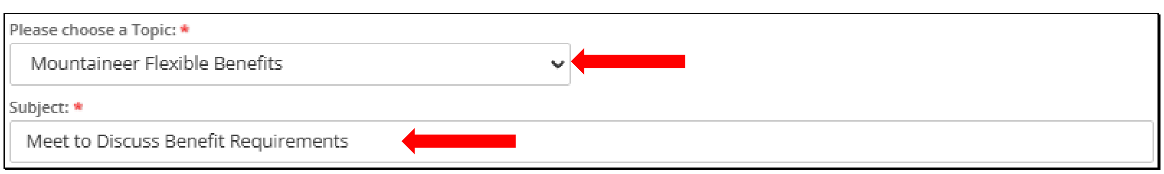
New and open conversations display on the **Ongoing Conversations** tab, and will appear in the Recently Received and/or Recently Sent sections. Resolved conversations display on the **Resolved Conversations** tab.

10.1 Start New Conversation

1. Click the **Start New Conversation** button.
   The New Conversation window opens. The employer organization displays in the **Please choose an Organization** field.

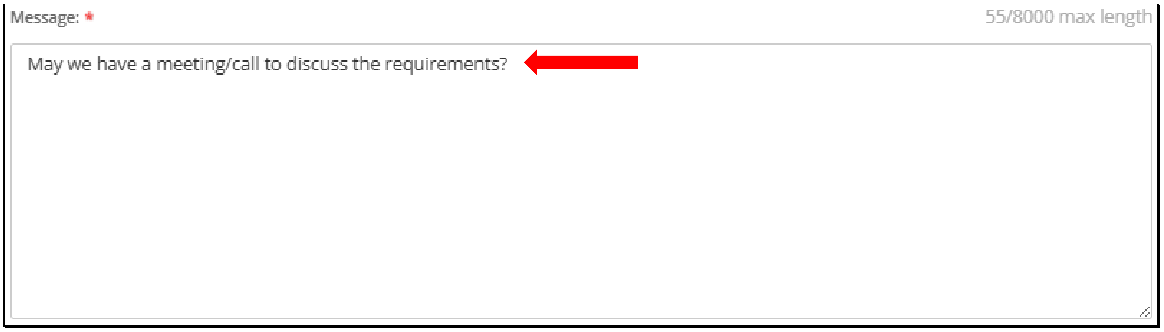


2. Click the drop-down arrow in the **Please choose a Topic** field, and select the appropriate topic.

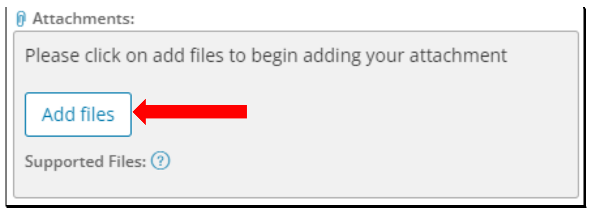


3. Type a subject for the message in the **Subject** field.

4. Type the message contents in the **Message** field.

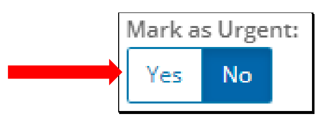


If one or more attachments are required:



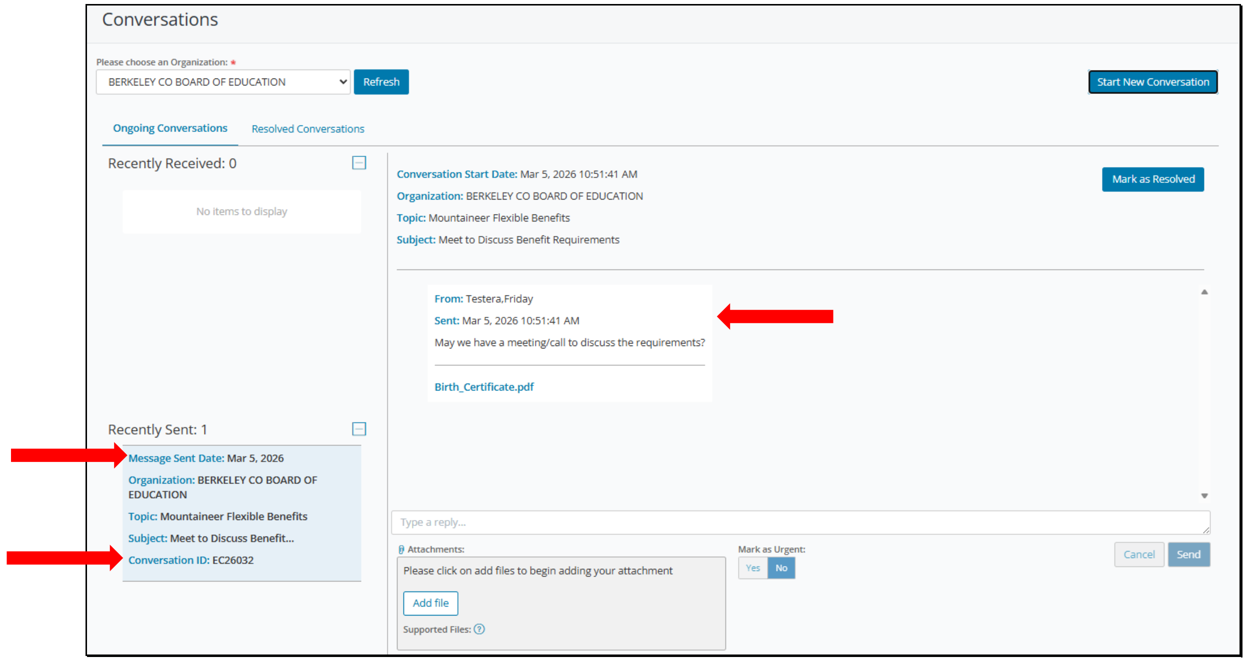
5. Click the **Add files** button.
   An Open window opens; browse for the appropriate files and click the Open button.
   The selected file(s) display(s) in the Attachments section.

6. If necessary, click the Yes button in the **Mark as Urgent** field.



7. When ready to send, click the **Submit** button.
   The system returns to the Ongoing Conversations tab of the Conversations screen.

The new conversation displays as a **Recently Sent** item.

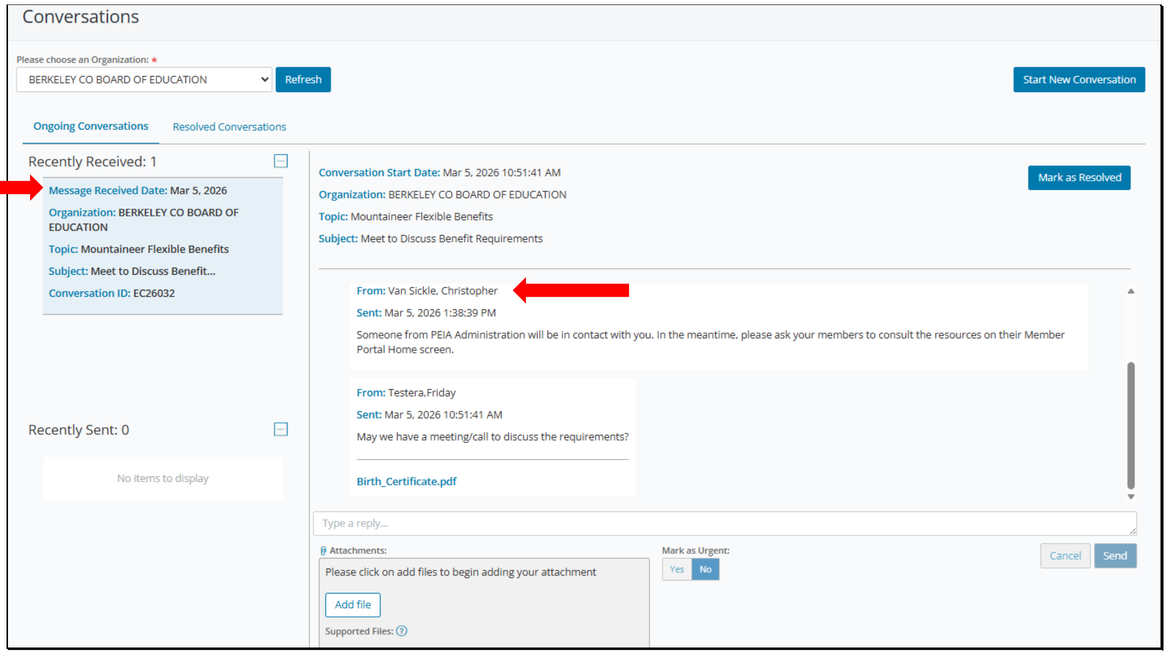


Note the **Conversation ID**. When an PEIA administrator reviews their Conversations as part of their workflow, the administrator will see the same Conversation ID in the employer's Log History.

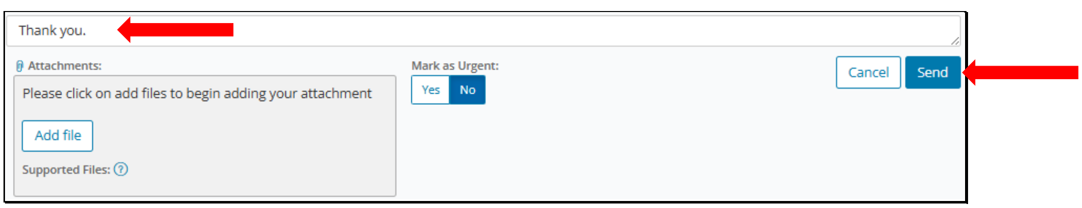
10.2 Receive the Reply and Resolve

When the PEIA administrator has replied to the message, return to the Conversations screen.

1. Click on the message in the **Recently Received** column.
   The conversation displays to the right.

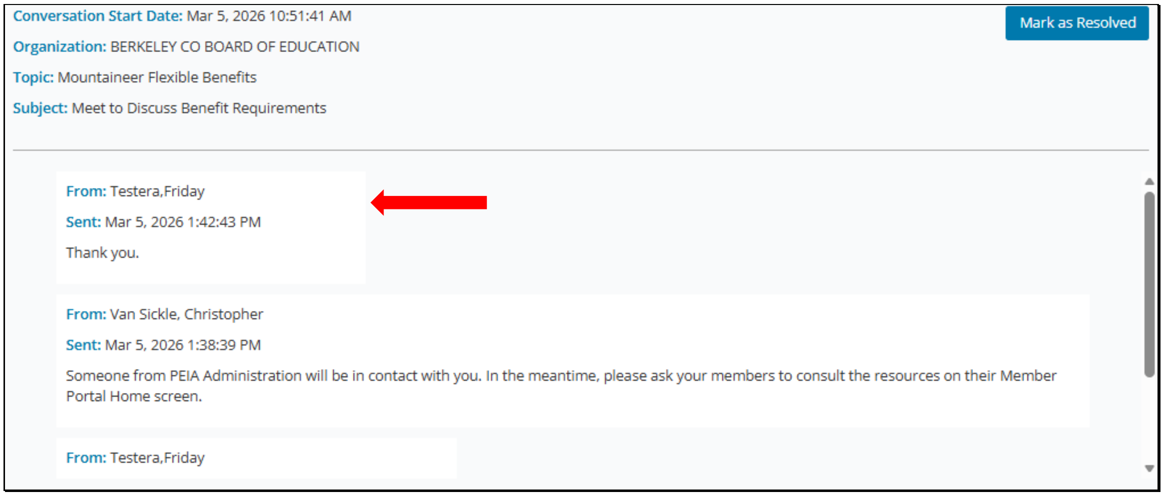


If necessary to reply to the conversation:



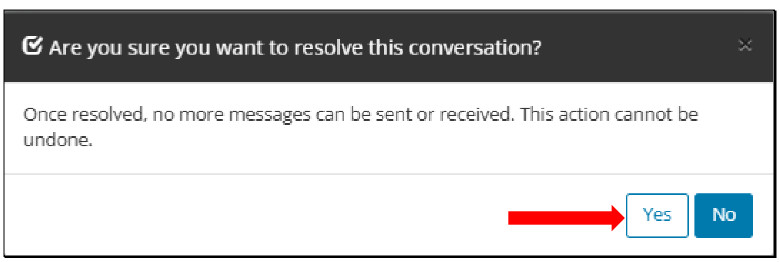
2. Type the reply text in the **Type a reply** field.
   Use the **Add files** button in the **Attachments** section if necessary to include files with the reply.

3. Click the **Send** button.
   The reply text displays above the original conversation.

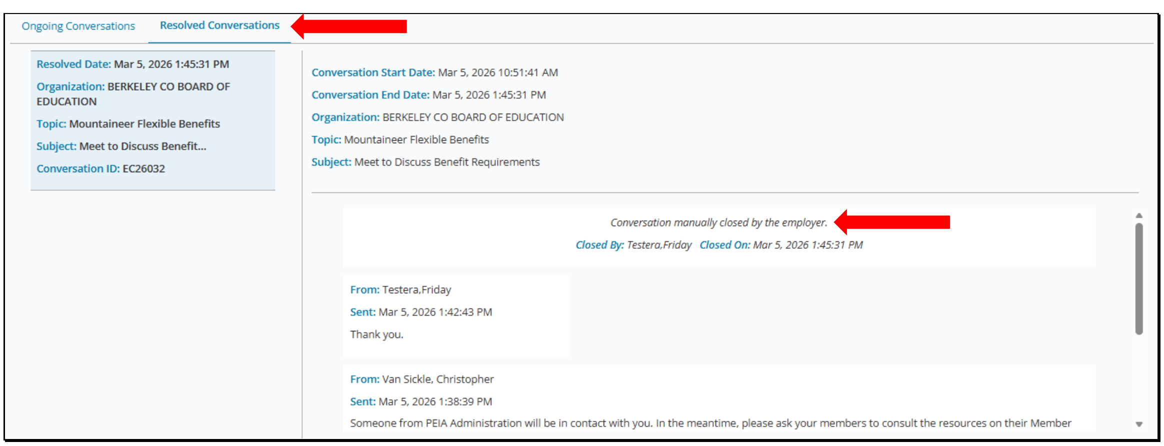


To resolve the conversation:

4. Click the **Mark as Resolved** button.
   A confirmation window opens.



5. Click the **Yes** button.
   The Conversations Screen switches to the Resolved Conversations tab.



Note the **Conversation manually closed by the employer** heading.