



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

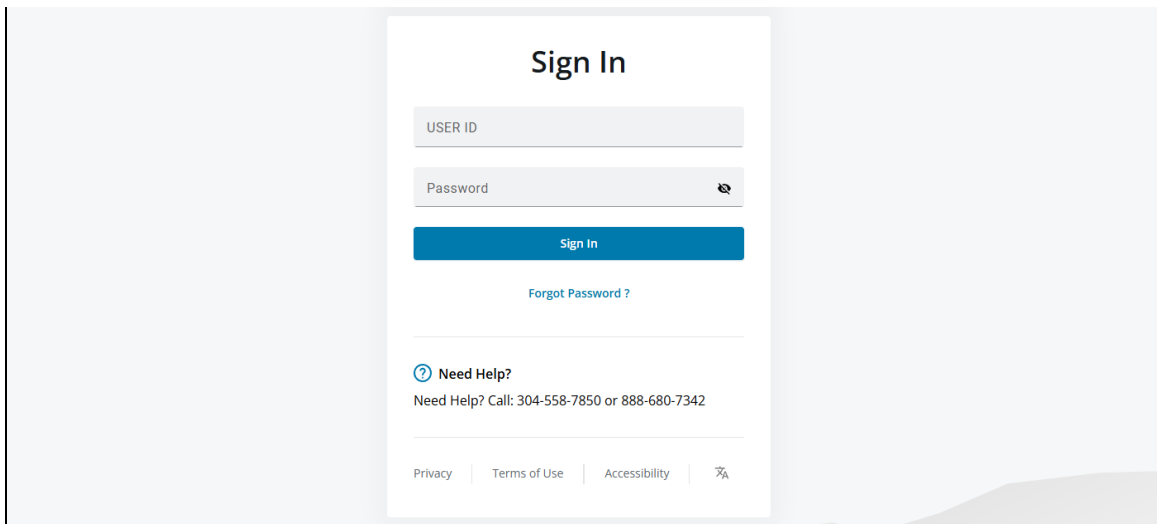
Examples are presented in a step by step approach. PEIA screens continue to change throughout the UAT period, therefore, many of the screenshots in this guide may not reflect the current testing environment. Style, colors, and order of content on menus are subject to change.

2 Employer Portal Configuration

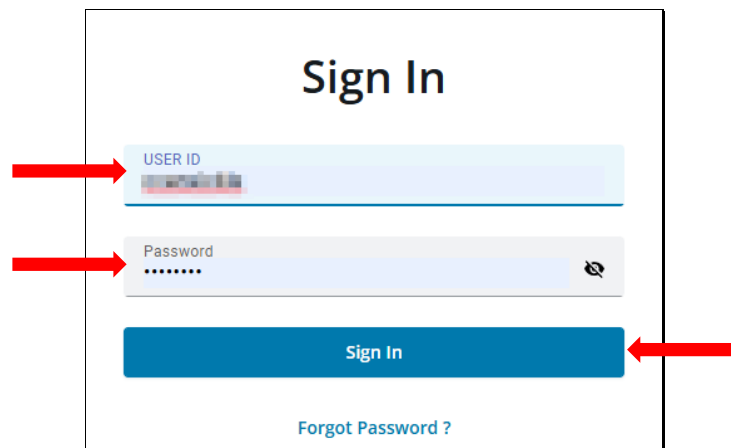
2.1 Employer Portal Login

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

Change Password for
[\[redacted\]](#)

New Password

Repeat New Password

Change Password

[Cancel and Return to Sign In](#)

Password Rules:

- Must contain a minimum of 8 and a maximum of 12 alphanumeric characters.
- Must contain at least one lowercase letter.
- Must contain at least one uppercase letter.
- Must contain at least one number.
- Must contain special characters, such as, but not limited to "!", "@", "\$", "#", "*".
- Must not re-use your previous 6 passwords.
- Must not be repeated within the past 60 days.

[Privacy](#) | [Terms of Use](#) | [Accessibility](#) |

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.

Change Password for
[\[redacted\]](#)

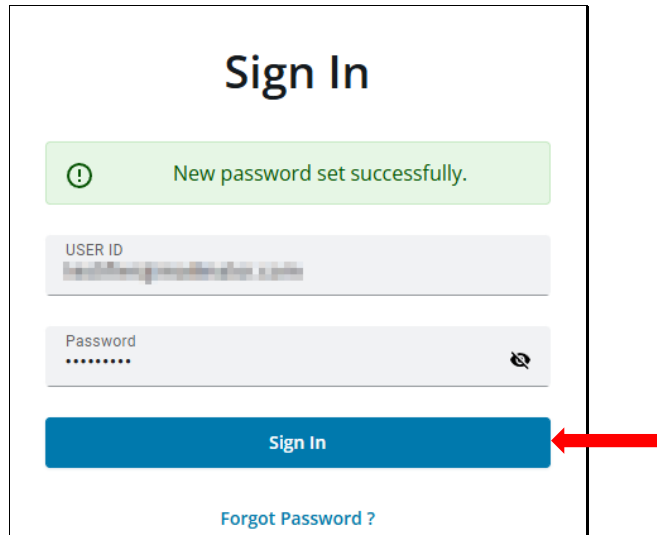
New Password

Repeat New Password

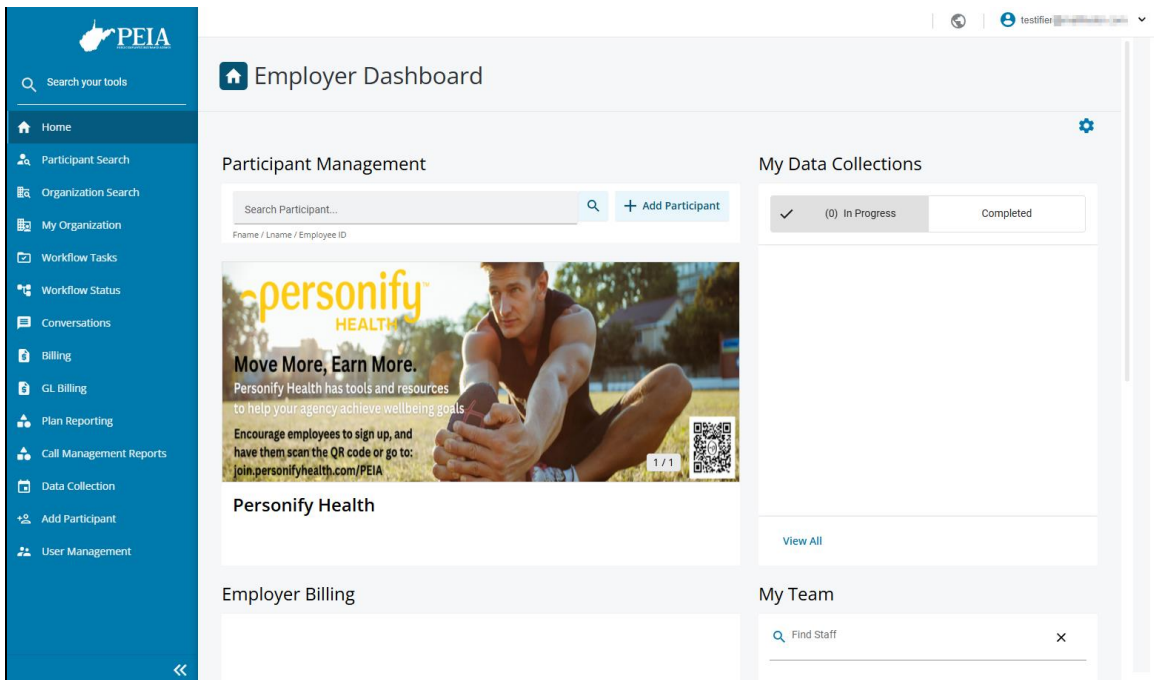
Change Password

[Cancel and Return to Sign In](#)

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

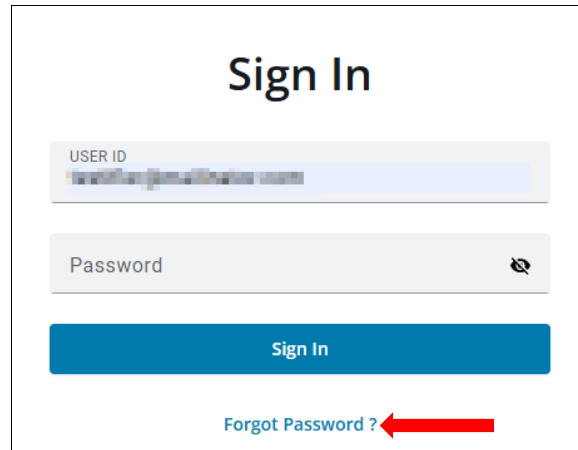


8. Click the **Sign In** button again.
The Employer Dashboard (Home) screen displays.



2.1.2 Forgotten Password Recovery

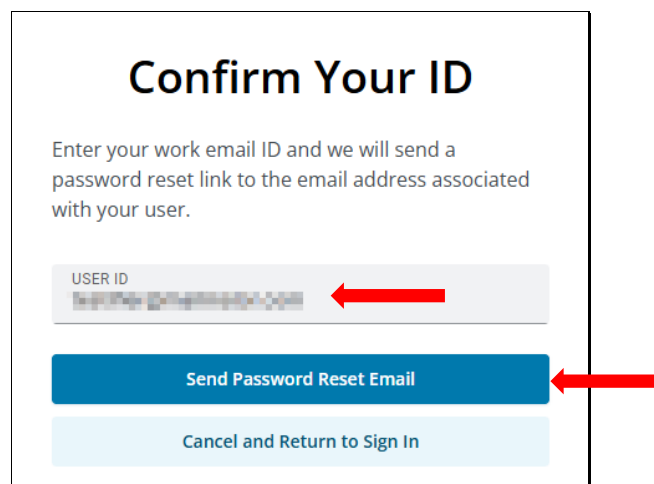
Follow these steps if you forget your login password:



The screenshot shows a 'Sign In' form with the following elements:

- Header: **Sign In**
- Input field: **USER ID** with the text `test@the.gov.uk/123456789.com`
- Input field: **Password** with a toggle icon on the right.
- Button: **Sign In** (blue)
- Link: **Forgot Password?** with a red arrow pointing to it from the right.

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



The screenshot shows a 'Confirm Your ID' form with the following elements:

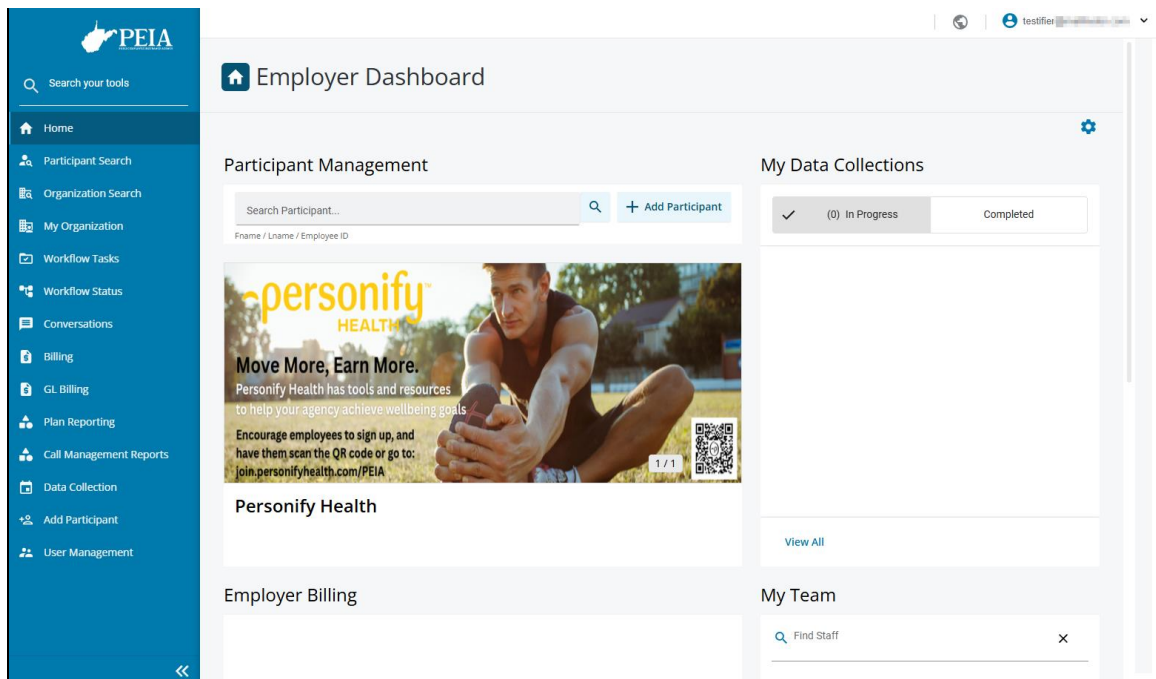
- Header: **Confirm Your ID**
- Text: Enter your work email ID and we will send a password reset link to the email address associated with your user.
- Input field: **USER ID** with the text `test@the.gov.uk/123456789.com` and a red arrow pointing to it from the right.
- Buttons: **Send Password Reset Email** (blue) and **Cancel and Return to Sign In** (light blue). A red arrow points to the 'Send Password Reset Email' button from the right.

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

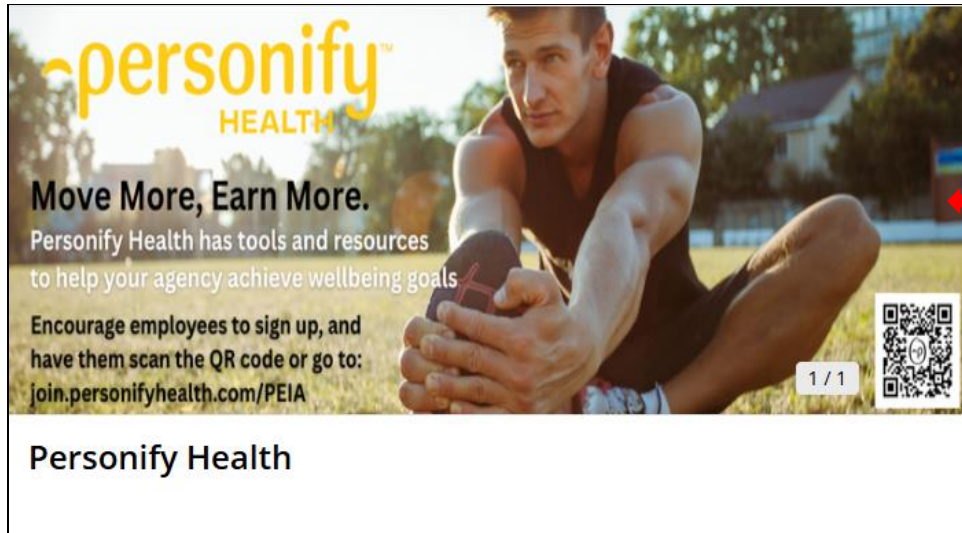
At the left of the Employer Dashboard screen is a blue menu of commands, usually referred to as the **left navigation menu**. Many of these left navigation menu commands will be referenced throughout this guide. The options you see in the left navigation menu will vary based on your employer portal access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

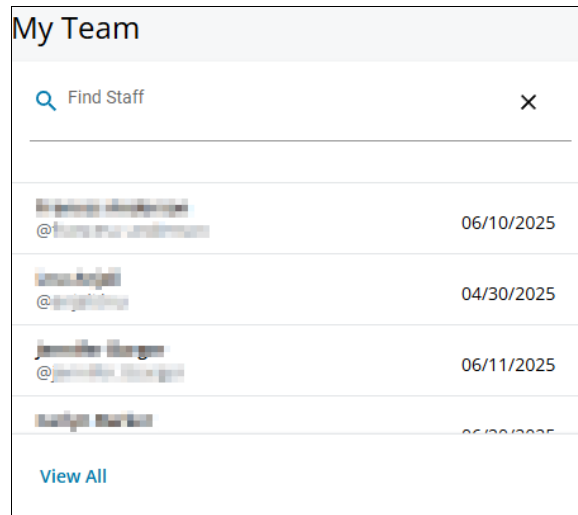


1. Click directly on the picture to open a new browser tab for the Personify Health web page.

A screenshot of the Personify Health sign-up form. The form is titled 'Sign up for better health' and includes a progress indicator with four steps: Identify, Agree, Create, and Finish. The 'Identify' step is currently active. The form asks for the following information: First name, Last name, My Policy Holder ID, Date of birth (mm/dd/yyyy), Zip code, and Country/region. A 'Continue' button is located at the bottom of the form, and a link for 'Already a member? Sign In' is provided below it. The form is set to 'English (U.S.)' as indicated by the 'Select Language' dropdown menu.

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

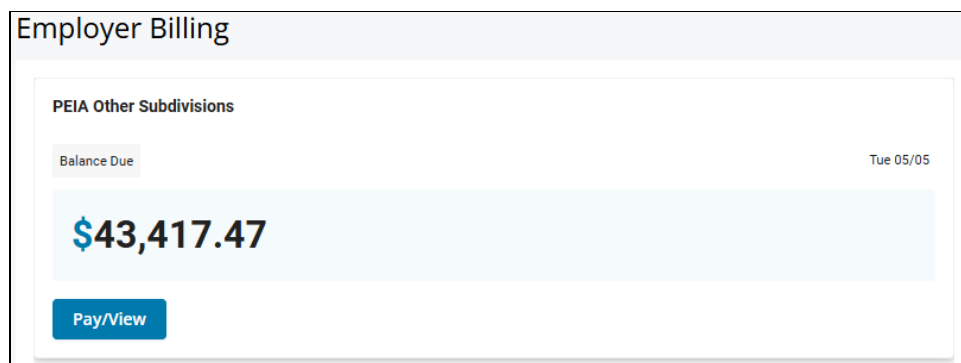
My Team



My Team	
<input type="text" value="Find Staff"/>	✕
Erin... @erin...	06/10/2025
... @...	04/30/2025
Jessica... @jessica...	06/11/2025
... @...	06/08/2025
View All	

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	
PEIA Other Subdivisions	
Balance Due	Tue 05/05
\$43,417.47	
Pay/View	

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

My Data Collections		
(0) In Progress	✓	Completed
Non-State Agencies Remittance Advice - 800329911 - 20260324-093424.714-EDT Non-State Agencies Remittance Advice		2026-03-24
Non-State Agencies Remittance Advice - 800329911 - 20260323-161814.607-EDT Non-State Agencies Remittance Advice		2026-03-23

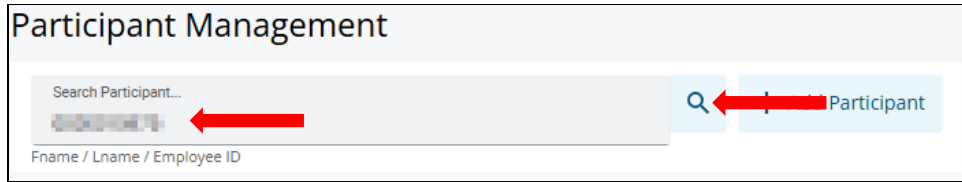
You will use the Data Collection function to upload a file of all your organization's payroll deductions. This will create payments and adjustments for any affected employees.

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

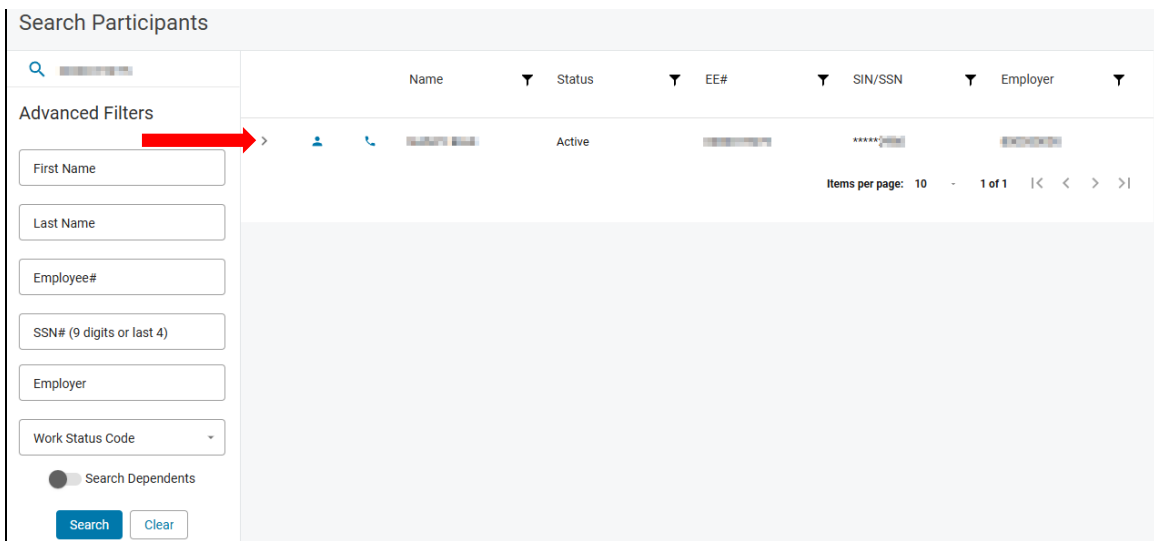
3 Participant Management

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.

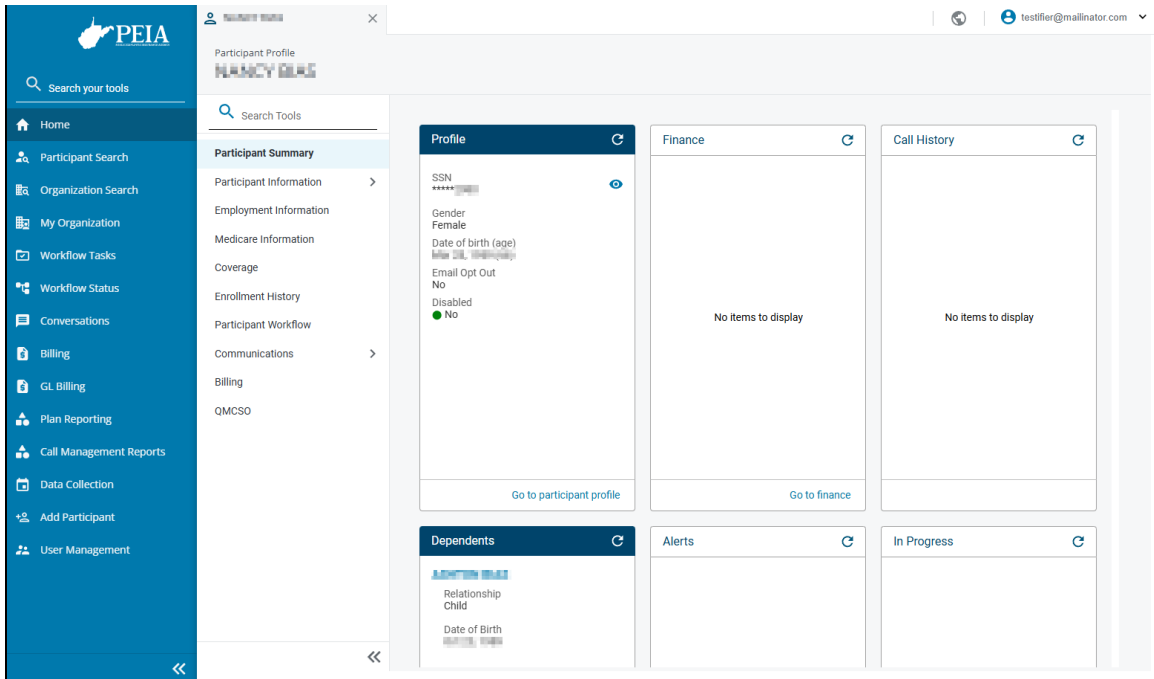
3. Click the **arrow icon**. The list of dependents displays.

Name	Status	EE#	SIN/SSN	Employer
 [Red arrow points here]	Active	[REDACTED]	[REDACTED]	[REDACTED]

Dependent	Status	SIN/SSN	Gender, Relation	Birth Date
[REDACTED]	● Eligible Dependent	[REDACTED]	Female Child	[REDACTED]
[REDACTED]	● Eligible Dependent	[REDACTED]	Male Child	[REDACTED]

Items per page: 10 - 1 of 1 | < > >>

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



Participant Profile: **NANCY DAVIS**

Participant Summary

- Participant Information
- Employment Information
- Medicare Information
- Coverage
- Enrollment History
- Participant Workflow
- Communications
- Billing
- QMCSO

Profile

SSN: [REDACTED]

Gender: Female

Date of birth (age): [REDACTED]

Email Opt Out: No

Disabled: ● No

Go to participant profile

Finance

No items to display

Go to finance

Call History

No items to display

Dependents

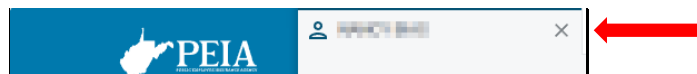
Relationship: Child

Date of Birth: [REDACTED]

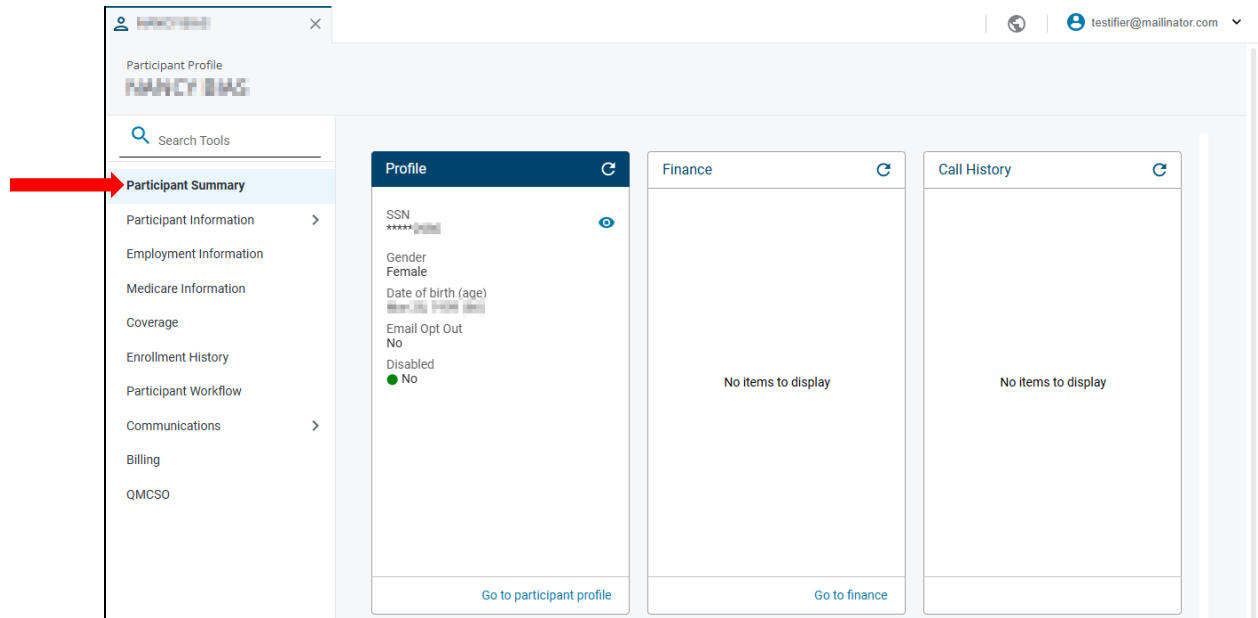
Alerts

In Progress

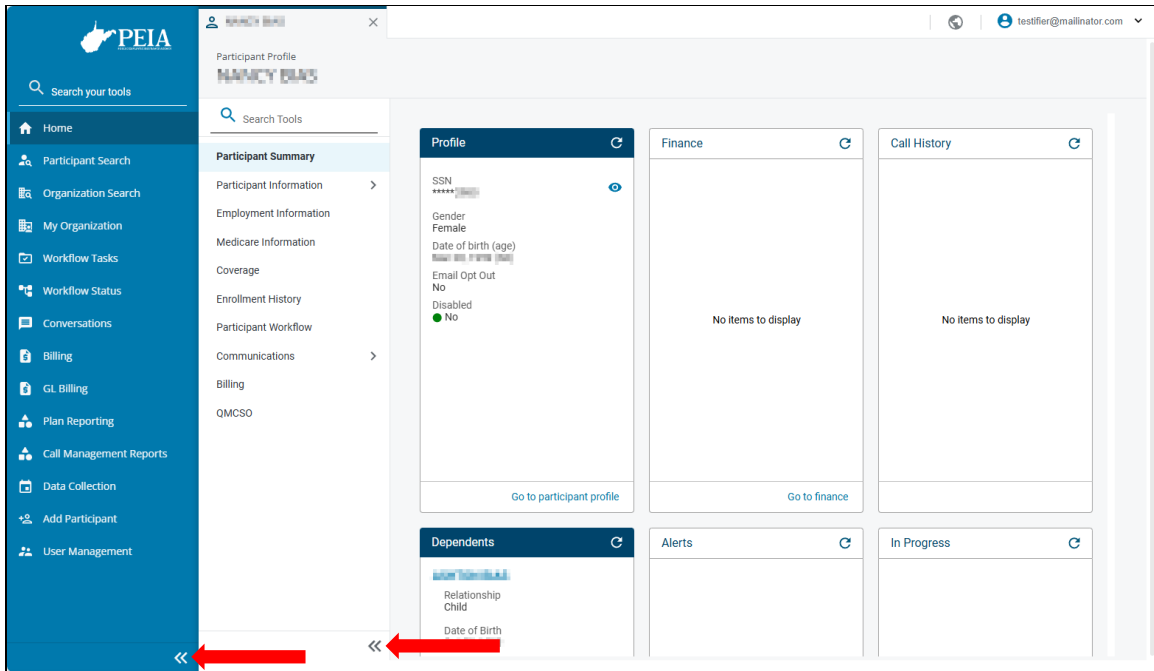
Note that the name of the selected participant appears in a tab at the top of the screen.



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**.

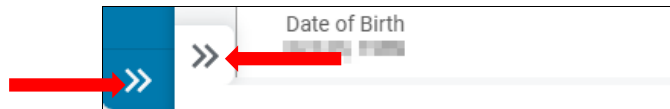


3.1.1 Collapse and Expand Menu Panels



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.



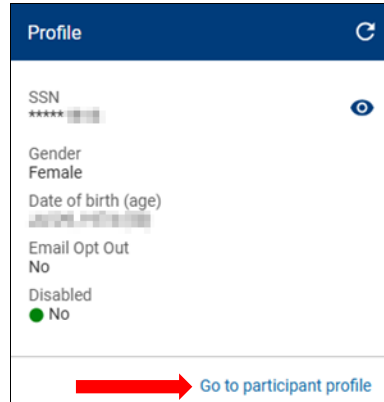
2. Click the right chevrons to **expand** each panel again.

3.2 Exploring the Participant Profile

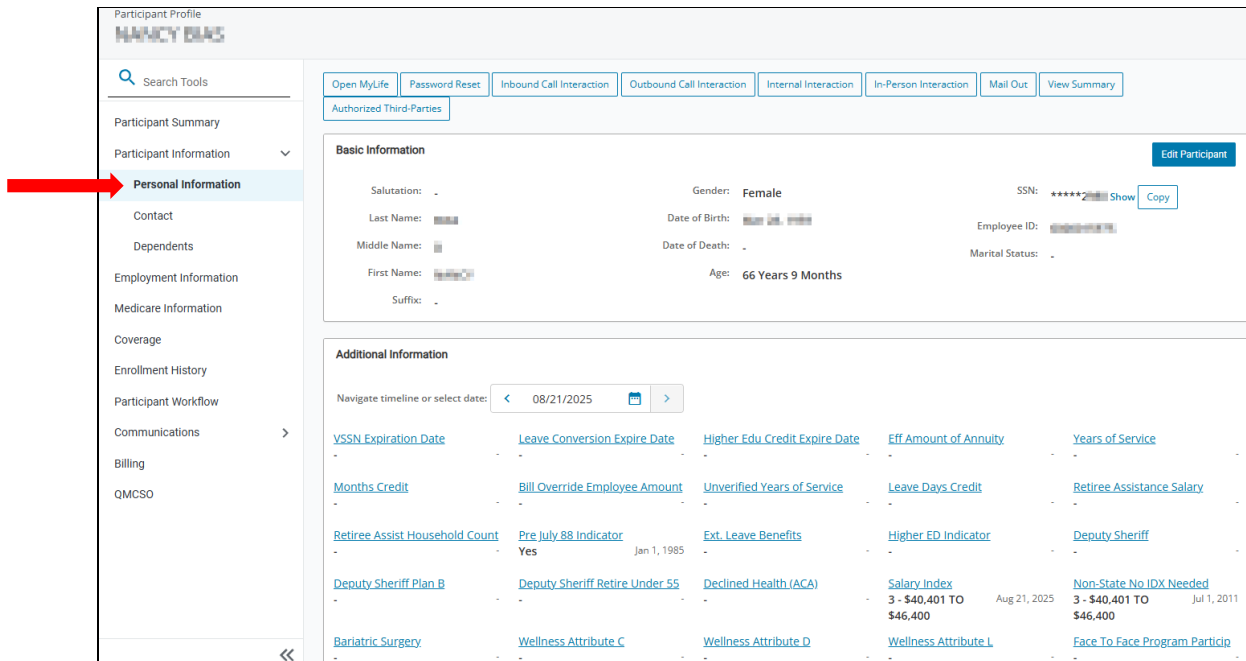
The Participant Profile (also known as the Participant Summary) screen contains widgets of its own. Each of these provides a snapshot of the participant's information on file, including sections for **Profile**, **Dependents**, **Coverage**, and **Finance**. Click the link at the bottom of each widget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

Additional Information

Navigate timeline or select date: < 08/21/2025 >

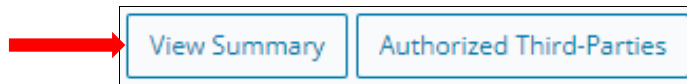
VSSN Expiration Date	Leave Conversion Expire Date	Higher Edu Credit Expire Date	Eff Amount of Annuity	Years of Service
Months Credit	Bill Override Employee Amount	Unverified Years of Service	Leave Days Credit	Retiree Assistance Salary
Retiree Assist Household Count	Pre July 88 Indicator Yes	Ext. Leave Benefits Jan 1, 1985	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	Non-State No IDX Needed 3 - \$40,401 TO \$46,400
Bariatric Surgery	Wellness Attribute C	Wellness Attribute D	Wellness Attribute L	Face To Face Program Participo
Leave Of Absence - Family	Return To PFIA	Retiree Returned To Work	Not Eligible To Retire (CPRB)	Transfer To CPRB
CoPay Waiver	Member of TIAA Cref	Elected Official	Weight Management Enhanced	Medical Assistance
Premium Assistance	Workers Comp Leave Buyout	Workers Comp Leave Conversion	Waiver of Premium	Do Not Bill Nonpar < 5 YOS
Coord of Prescription Benefits	Coordination of Benefits	Retiree Assist Federal Pov Lvl	Employee ESRD Flag	Emp Spouse Avg Salary Index
Employee Spouse	VSSN	Non Employee Type	International Address Flag	HRIS Member Flag
Special Medicare Status	Medicare Part B Addtl Details	Originating Person ID	Disability Status	

Field History: Salary Index

Value C	Effective Date	Entry Date C	Source C
3 - \$40,401 TO \$46,400	Aug 21, 2025	Dec 17, 2025	(Process: conv/RecalcEventInitProcess, User: -)

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.

[Go Back](#) [Print Summary](#)

Employee - Basic Information

Salutation: - Gender: **Female** SSN: ***** Show [Copy](#)

Last Name: [REDACTED] Date of Birth: [REDACTED] Employee ID: [REDACTED]

Middle Name: [REDACTED] Date of Death: - Marital Status: -

First Name: [REDACTED] Age: **66 Years 9 Months**

Suffix: -

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	Non-State No IDX Needed
-	-	3 - \$40,401 TO \$46,400 Aug 21, 2025	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
<input checked="" type="radio"/>	Mailing	01/18/2000	[REDACTED]	-	[REDACTED]	[REDACTED]	[REDACTED]	US
<input checked="" type="radio"/>	Dependent	03/06/2023	[REDACTED]	-	[REDACTED]	[REDACTED]	[REDACTED]	US

Contact - E-mail			
Preferred	E-mail Type	Start Date	Address
<input checked="" type="radio"/>	Personal	01/01/2024	[REDACTED]

Contact - Phone			
Preferred	Phone Type	Start Date	Number
<input checked="" type="radio"/>	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	Annual Salary	Rate Of Pay	Pay Frequency			
BOONE CO BOARD OF EDUCATION Sep 1, 2005	\$45,880.00 Jul 29, 2025	\$0.00	SemiMonthly Jul 29, 2025			
Employment Status	Original Hire Date	Hire Date	Branch			
Active Sep 1, 2005	Sep 1, 2005	Aug 22, 2005	005-State Sep 1, 2005			
Position Status	Oasis ID	Employment Type	Member Benefit ID			
-	-	ST Sep 1, 2005	-			

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.

Go Back
Print Summary

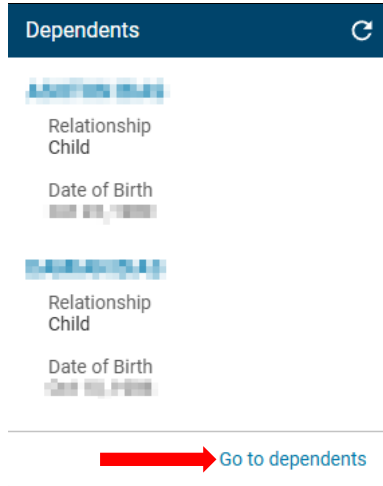
Employee - Basic Information

Salutation: -	Gender: Female	SSN: ***** Show Copy
Last Name: [REDACTED]	Date of Birth: [REDACTED]	Employee ID: [REDACTED]
Middle Name: [REDACTED]	Date of Death: -	Marital Status: -
First Name: [REDACTED]	Age: 66 Years 9 Months	
Suffix: -		

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
[REDACTED]	Child	[REDACTED]	Eligible Dependent	12/01/2007	No
[REDACTED]	Child	[REDACTED]	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.

The screenshot shows the 'Dependent Information' page for a child. It has tabs for 'Dependent Information', 'Contact', and 'Coverage', and an 'Edit Dependent' button. The 'Basic Information' section includes: Last Name, Middle Name, First Name, Suffix, Gender (Male), Date of Birth, Age (39 Years 3 Months), SSN (with a 'Show' button), and Date of Death. The 'Additional Information' section includes: Dependent Relationship History (Child, Dec 1, 2007), Bariatric Surgery Flag, Diabetes Face to Face, Co Pay Waiver, Coordination of Prescription Benefits, Coordination of Benefits, Wellness Attribute C, and Wellness Attribute D. There is an 'Edit' button in the top right of the 'Additional Information' section.

- 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.

Additional Information Edit

Dependent Relationship History Child Dec 1, 2007	Pediatric Surgery Flag -	Diabetes Face to Face -	Co Pay Waiver -
Coordination of Prescription Benefits -	Coordination of Benefits -	Wellness Attribute C -	Wellness Attribute D -
Wellness Attribute -	Weigh Management -	Special Medicare Status -	Dependent Status History Ineligible Dependent Aug 21, 2025
Medicare Part B Additional Details -	Disabled Status -	Marital Status -	Return To PEIA (Special Medicare Exception) -
Adoption or Temporary Guardianship -	Dependent ESRD Flag -		

Field History: Dependent Relationship History

Value	Effective Date	Entry Date	Source
Child	Dec 1, 2007	Dec 1, 2007	(Process: -, User: -)

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

[Dependent Information](#) [Contact](#) Add Dependent Address

Participant's preferred address.

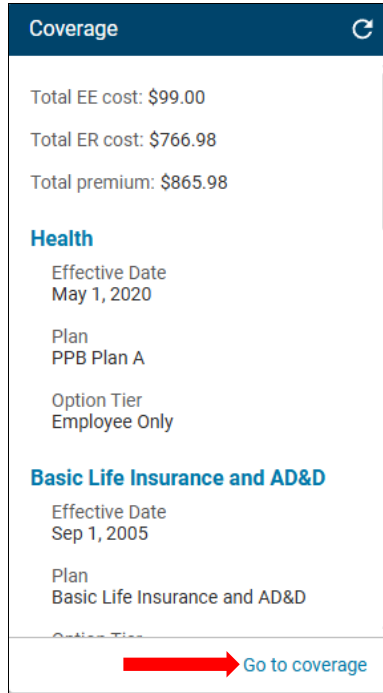
- Click the **Coverage** link to display the dependent's coverage information.

[Dependent Information](#) [Contact](#) [Coverage](#) Edit Dependent Coverage

Benefit	Plan	Start Date	End Date
Medical	Blue Cross - Blue Shield PPO1	12/01/2015	-

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.

Current		History									
Employee Set				Active State		Download Confirmation Statement		Update Coverage			
Health											
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
-		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	Org Id	Plan	Option/Tier	Elected Volume	Approved Volume	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

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

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

Current **History** ←


Complete History Specific Date

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

- Click the **Specific Date** option.

Current **History**

Complete History Specific Date Navigate timeline or select date < 08/21/2025 >  ←

Health ^

Alert	Plan	Option/Tier	Elected Volume	Approved Volume	Dependents
	PPB Plan A	Employee Only	-	-	-


August 2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	01	02
03	04	05	06	07	08	09
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	01	02	03	04	05	06

Today Clear Close

Basic Life Insurance and AD&D

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

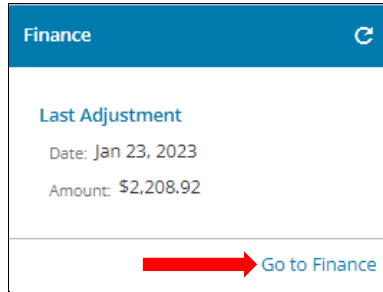
Complete History Specific Date Navigate timeline or select date < 08/21/2025 > 

Health ^

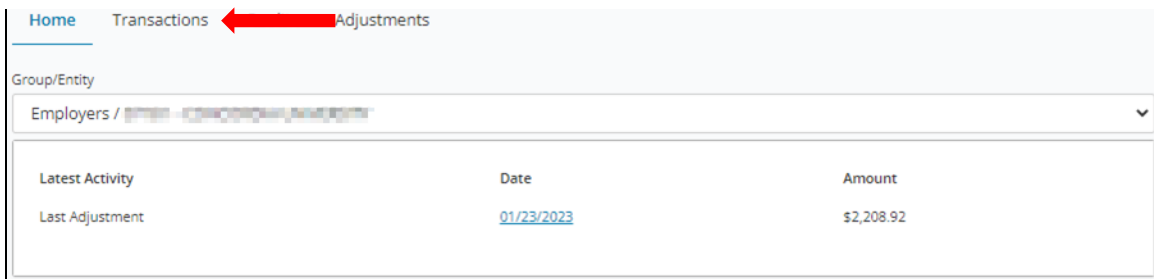
Alert	Plan	Option/Tier	Elected Volume	Approved Volume	Dependents	Event (Effective Date)	Coverage Start Date	Coverage End Date	Total Premium	EE Cost	ER Cost
	PPB Plan A	Employee Only	-	-	-	Conversion Recalc (08/21/2025)	05/01/2020	-	\$889.00	\$124.00	\$765.00

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.



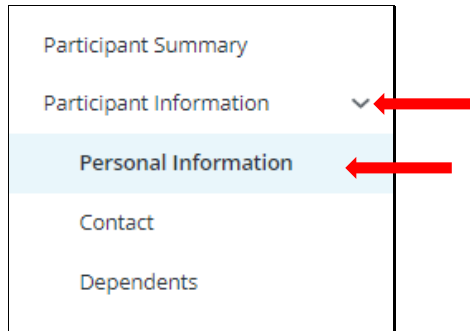
2. Click the **Transactions** link. The participant's invoiced benefits screen display.

Search Results

ID ↓	Group/Entity ↓	Date ↓	Transaction Type ↓	Item ↓	Coverage ↓	Billing Period ↓	Person ID ↓	Name ↓	Amount ↓
1845876	Employers / [redacted]	01/23/2023	Payment	Retirement Plan	Retirement Plan (Pension) / tradReg	01/01/2023 - 01/31/2023	[redacted]	[redacted]	-\$2,208.92
1845156	Employers / [redacted]	01/23/2023	Payment	Disability	Disability / Disability Benefit A / 70% of Annual Compensation	01/01/2023 - 01/31/2023	[redacted]	[redacted]	-\$2,208.92
1841454	Employers / [redacted]	01/23/2023	Payment	Retirement Plan	Retirement Plan (Pension) / tradReg	12/01/2022 - 12/31/2022	[redacted]	[redacted]	-\$2,208.92
1840788	Employers / [redacted]	01/23/2023	Payment	Disability	Disability / Disability Benefit A / 70% of Annual Compensation	12/01/2022 - 12/31/2022	[redacted]	[redacted]	-\$2,208.92
1836721	Employers / [redacted]	01/23/2023	Payment	Retirement Plan	Retirement Plan (Pension) / tradReg	11/01/2022 - 11/30/2022	[redacted]	[redacted]	-\$2,208.92

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.

Participant Profile
NANCY BLAS

Search Tools

Participant Summary

Participant Information

Personal Information

Contact

Dependents

Employment Information

Medicare Information

Coverage

Enrollment History

Participant Workflow

Communications

Billing

QMCSO

Open MyLife Password Reset Inbound Call Interaction Outbound Call Interaction Internal Interaction In-Person Interaction Mail Out View Summary

Authorized Third-Parties

Basic Information

Salutation: . Gender: **Female** SSN: *****2### Show Copy

Last Name: ### Middle Name: First Name: ### Suffix: .

Date of Birth: ###.##.#### Date of Death: . Age: **66 Years 9 Months**

Employee ID: ###-###-### Marital Status: .

Edit Participant

Additional Information

Navigate timeline or select date: < 08/21/2025 >

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	Ext. Leave Benefits	Higher ED Indicator	Deputy Sheriff
-	Yes Jan 1, 1985	-	-	-
Deputy Sheriff Plan B	Deputy Sheriff Retire Under 55	Declined Health (ACA)	Salary Index	Non-State No IDX Needed
-	-	-	3 - \$40,401 TO \$46,400 Aug 21, 2025	3 - \$40,401 TO \$46,400 Jul 1, 2011
Bariatric Surgery	Wellness Attribute C	Wellness Attribute D	Wellness Attribute L	Face To Face Program Particip
-	-	-	-	-

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

Contact - Address								
Preferred	Address Type	Effective Date	Address 1	Address 2	City	State	ZIP Code	Country
<input checked="" type="radio"/>	Mailing	01/18/2000	██████████	-	██████████	██	██████	US
<input checked="" type="radio"/>	Dependent	03/06/2023	██████████	-	██████████	██	██████	US

Contact - E-mail			
Preferred	E-mail Type	Start Date	Address
<input checked="" type="radio"/>	Personal	01/01/2024	██████████@██████████.██

Contact - Phone				
Preferred	Phone Type	Start Date	Phone Type	Number
<input checked="" type="radio"/>	Home	01/01/2024		██████████

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

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

Show inactive dependents: Yes No

Dependent Information		Contact	Coverage	Edit Dependent
Basic Information				
Last Name: ██████	Gender: Female	SSN: *****	Show	Copy
Middle Name: █	Date of Birth: ██/██/██	Also Employee:	-	
First Name: ██████	Date of Death: -	E-mail Address:	-	
Suffix: -	Age: 36 Years 2 Months	Phone:	-	

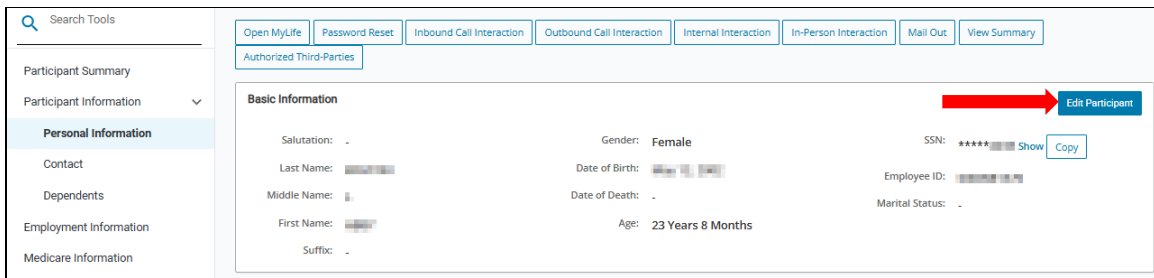
4 Edit Participant and Add Participant

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.)

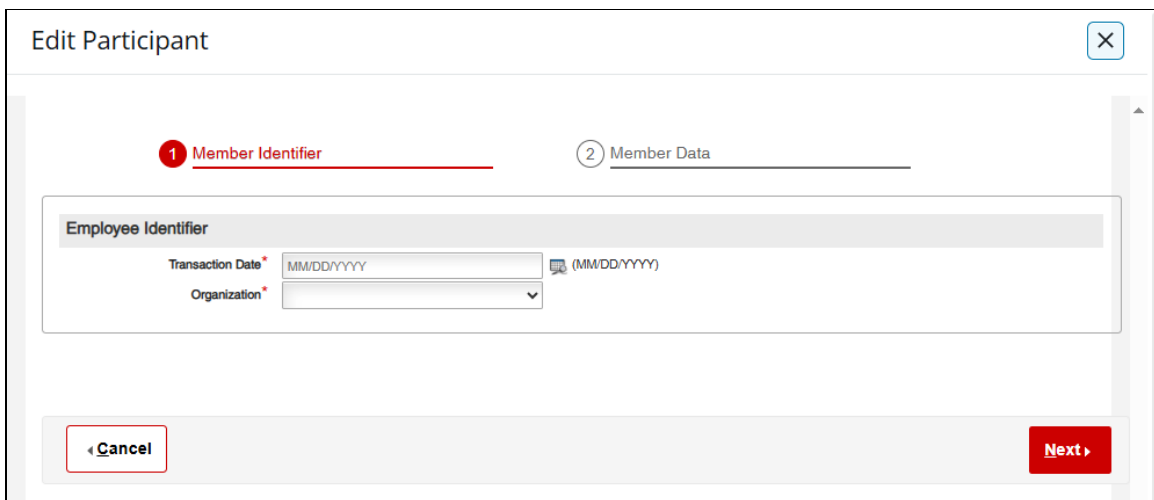
Begin with a Participant Search; select a participant and access their Personal Information. The **Edit Participant** functionality is available as a button on a participant's **Personal Information** screen.

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



The screenshot shows a web interface for managing a participant. On the left is a navigation menu with options: Participant Summary, Participant Information (expanded), Personal Information (selected), Contact, Dependents, Employment Information, and Medicare Information. The main content area is titled 'Basic Information' and contains fields for Salutation, Last Name, Middle Name, First Name, Suffix, Gender (Female), Date of Birth, Date of Death, Age (23 Years 8 Months), SSN (masked), Employee ID (masked), and Marital Status. A red arrow points to the 'Edit Participant' button in the top right corner of the main content area.

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



The screenshot shows the 'Edit Participant' window with a close button in the top right. There are two tabs: '1 Member Identifier' (selected and highlighted with a red circle and line) and '2 Member Data'. The 'Employee Identifier' section contains a 'Transaction Date' field with a date picker icon and a dropdown menu for 'Organization'. At the bottom, there are 'Cancel' and 'Next' buttons.

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.

The screenshot shows the 'Employee Identifier' section of a form. It contains two main fields: 'Transaction Date' and 'Organization'. The 'Transaction Date' field has a calendar icon and a date of 01/12/2026. The 'Organization' field is a dropdown menu with 'BOONE CO BOARD OF EDUCATION' selected. At the bottom, there are two buttons: 'Cancel' on the left and 'Next' on the right. Red arrows point to the calendar icon, the dropdown arrow, the selected organization name, and the 'Next' button.

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

The screenshot shows the 'Edit Participant' window. At the top, there are two tabs: '1 Member Identifier' and '2 Member Data'. The 'Member Data' tab is active. Below the tabs, there is a 'Print' button. The main section is titled 'Basic Employee Data' and contains several input fields: 'Employee Id', 'First Name', 'Middle Name', 'Last Name', 'Gender' (set to 'Female'), and 'SSN'.

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

The screenshot shows the 'Employment Information' section of the form. It contains several fields: 'Department ID' (BOONE CO BOARD OF EDUCATION), 'Employment Status' (Active), 'Date of Hire' (09/01/2023), 'Original Date of Hire' (08/14/2023), 'Branch' (005-State), and 'Position Status'.

Branch	005-State	▼
Position Status *		▼
Job Position		
Payroll Frequency	Permanent Full Time	

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

◀ Previous	◀ Cancel	Next ▶
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- Scroll to the bottom of the window and click the **Next** button. The system returns to the Personal Information screen.
- 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.

Employment Details: BOONE CO BOARD OF EDUCATION					
Navigate timeline or select date: < 01/12/2026 >					
Annual Salary	Jul 29, 2025	Rate Of Pay	-	Pay Frequency	Jul 29, 2025
\$49,642.00		\$0.00		SemiMonthly	Active
Original Hire Date		Hire Date	-	Branch	Position Status
Sep 1, 2023		Aug 14, 2023		005-State	Permanent Full Time
				Sep 1, 2023	Jan 12, 2026
Oasis ID		Employment Type	Sep 1, 2023	Member Benefit ID	Job Position
-		ST		-	-

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

Field History: Position Status			
Value	Effective Date	Entry Date	Source
Permanent Full Time	Jan 12, 2026	Jan 12, 2026	MemberAddUpdateTool.UpdateMember (Process: MemberAddUpdateTool.UpdateMember, User: testtifier@mailinator.com)

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.

A screenshot of the "Add Participant" screen. It shows two steps: "1 Member Identifier" and "2 Member Data". The "Member Identifier" section contains fields for "Transaction Date*", "SSN*", and "Organization Id*". A calendar is open over the "Transaction Date" field, showing the date 03/03/2026. There are "Cancel" and "Next" buttons at the bottom of the form.

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

A close-up of the "Transaction Date*" field. The date "03/03/2026" is entered. A red arrow points to the date. To the right is a calendar icon and the format "(MM/DD/YYYY)". Below it are the "SSN*" and "Organization Id*" fields.

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

A close-up of the "Organization Id*" field. The dropdown menu is open, showing "800030005 - BERKELEY CO BOARD OF E" selected. A red arrow points to the dropdown arrow.

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.

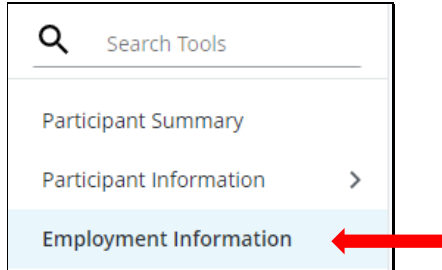
Note the new **Employee ID** at the top, generated automatically by the system.

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.

Employment History						
Company	Company ID	Start Date	End Date		Status	
BOONE CO BOARD OF EDUCATION	800050005	Sep 1, 2005	-		A	
BOONE CO BOARD OF EDUCATION	800050005	Sep 1, 1985	Jan 31, 2003		A	

Employment Details: BOONE CO BOARD OF EDUCATION						
Navigate timeline or select date: < 07/29/2025 >						
<u>Annual Salary</u>	Jul 29, 2025	<u>Rate Of Pay</u>	-	<u>Pay Frequency</u>	Jul 29, 2025	<u>Employment Status</u>
\$45,880.00		\$0.00		SemiMonthly		Active
<u>Hire Date</u>		<u>Branch</u>		<u>Position Status</u>		<u>Qasis ID</u>
Aug 22, 2005		005-State	Sep 1, 2005	-	-	ST
<u>Member Benefit ID</u>		<u>Job Position</u>		<u>Retirement Date</u>		<u>Retired From Account</u>
-		-	-	-	-	-
<u>Payroll Frequency</u>		<u>Number Of Pays</u>		<u>Scheduled Hours Per Day</u>		<u>Termination Date</u>
-		-	-	-	-	Jan 31, 2003
<u>Report Type</u>		<u>Type Of Rate of Pay</u>				<u>Termination Reason</u>
-		-	-			001
						Jan 31, 2003

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.

Employment History						
Company	Company ID	Start Date	End Date		Status	
BOONE CO BOARD OF EDUCATION	800050005	Sep 1, 2005	-		A	
BOONE CO BOARD OF EDUCATION	800050005	Sep 1, 1985	Jan 31, 2003		A	

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.

Employment History					
Company	Company ID	Start Date	End Date	Status	
BOONE CO BOARD OF ED...	800050005	Sep 1, 2005	-	A	
BOONE CO BOARD OF ED...	800050005	Sep 1, 1985	Jan 31, 2003	A	

Employment Details: BOONE CO BOARD OF EDUCATION

Navigate timeline or select date: < 01/31/2003 >

Annual Salary	Rate Of Pay	Pay Frequency	Employment Status	Original Hire Date	
\$0.00	\$0.00	-	Active	Sep 1, 1985	Aug 1, 1985
Hire Date	Branch	Position Status	Oasis ID	Employment Type	
-	005-State	Aug 1, 1985	-	ST	Aug 1, 1985
Member Benefit ID	Job Position	Retirement Date	Retired From Account	Contract Days	
-	-	-	-	-	-
Payroll Frequency	Number Of Pays	Scheduled Hours Per Day	Termination Date	Termination Reason	
-	-	-	Jan 31, 2003	001	Jan 31, 2003
Report Type	Type Of Rate of Pay				
-	-				

Field History:

Select Details Field



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.


Employment Details: BOONE CO BOARD OF EDUCATION


Navigate timeline or select date: < 11/01/2002  


Annual Salary	Rate Of Pay	Pay Frequency	Employment Status	Original Hire Date
\$0.00	\$0.00	-	Active Sep 1, 1985	Aug 1, 1985
Hire Date	Branch	Position Status	Oasis ID	Employment Type
-	005-State Aug 1, 1985	-	-	ST Aug 1, 1985
Member Benefit ID	Job Position	Retirement Date	Retired From Account	Contract Days
-	-	-	-	-
Payroll Frequency	Number Of Pays	Scheduled Hours Per Day	Termination Date	Termination Reason
-	-	-	-	-
Report Type	Type Of Rate of Pay			
-	-			

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

Employment Details: BOONE CO BOARD OF EDUCATION

Navigate timeline or select date: < 11/01/2002  >

Annual Salary	Rate Of Pay	Pay Frequency	Employment Status	Original Hire Date
\$0.00	\$0.00	-	Active Sep 1, 1985	Aug 1, 1985
Hire Date	Branch 	Position Status	Oasis ID	Employment Type
-	005-State Aug 1, 1985	-	-	ST Aug 1, 1985
Member Benefit ID	Job Position	Retirement Date	Retired From Account	Contract Days
-	-	-	-	-
Payroll Frequency	Number Of Pays	Scheduled Hours Per Day	Termination Date	Termination Reason
-	-	-	-	-
Report Type	Type Of Rate of Pay			
-	-			

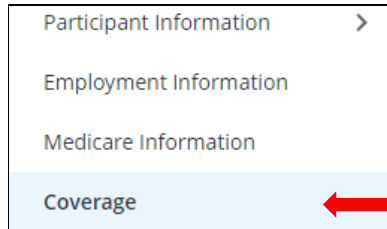
 **Field History: Branch**

Value	Effective Date	Entry Date	Source
005-State	Aug 1, 1985	Aug 1, 1985	(Process: BasePushImport, User: -)

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.

The screenshot shows the Coverage screen with two tabs: 'Current' (selected) and 'History'. Below the tabs are two buttons: 'Download Confirmation Statement' and 'Update Coverage'. The main content area is divided into two sections: 'Health' and 'Basic Life Insurance and AD&D'. Each section contains a table with columns: Alert, Org Id, Plan, Option/Tier, Elected Volume, Approved Volume, Event (Effective Date), Coverage Start Date, Coverage End Date, Total Premium, EE Cost, and ER Cost. Red arrows point to the 'Current' and 'History' tabs.

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
-	-	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	\$10,000	\$10,000.00	\$10,000.00	Conversion Recalc (08/21/2025)	09/01/2005	-	\$1.98	\$0.00	\$1.98

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

The screenshot shows the Coverage screen with the 'Health' section collapsed (indicated by a downward arrow) and the 'Optional Life and AD&D Insurance' section expanded (indicated by an upward arrow). A red arrow points to the downward arrow on the right side of the 'Health' section.

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
-	-	Optional Life and AD&D Insurance	No Coverage	-	-	Conversion Recalc (08/21/2025)	08/21/2025	-	\$0.00	\$0.00	\$0.00

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

Totals	\$865.98	\$99.00	\$766.98
--------	----------	---------	----------

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

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
-		Employees' Retirement Plan	Enrolled	-		Annual Enrollment (04/01/2025)	04/01/2025	-	\$0.00	\$0.00	\$0.00

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.

Status	Date	User	Process	Reference
Employee Set: Active				
In Progress	Apr 8, 2025 9:35:31 AM	Administrator (Gargi Srivastava)	annualEnrollEventInitiation	15584925
In Progress	Apr 22, 2025 6:14:13 PM	Administrator (Kevin)	processAEEventsBatch	15609854
Defaulted	Apr 22, 2025 6:14:15 PM	Administrator (Kevin)	processAEEventsBatch	15609854

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.

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
	Basic Life Insurance and AD&D	\$10,000	\$10,000.00	\$6,500.00	-	Conversion (09/01/2005)	09/01/2005	08/20/2025	\$0.00	\$0.00	\$0.00
	Basic Life Insurance and AD&D	\$10,000	\$10,000.00	-	-	Conversion (09/01/1985)	09/01/1985	01/31/2003	\$0.00	\$0.00	\$0.00

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

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.

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 (05/01/2020)	05/01/2020	08/20/2025	\$0.00	\$0.00	\$0.00

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:

PEIA Section 125 Premium Conversion Plan											
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		No	-	-	-	Conversion (09/01/2005)	09/01/2005	08/20/2025	\$0.00	\$0.00	\$0.00

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.

Event History ×

Status Coverage

Employee Set: -

Status	Date	User	Process	Reference
Processed	Dec 16, 2025 5:16:25 PM	Administrator (JWHEELER)	convCoverageEventsProcess	155331

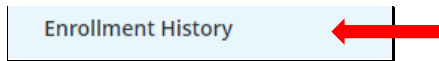
Cancel

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.

Show Cancelled Events: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		Create Enrollment
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

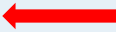
The Show Cancelled Events option defaults to *No*.


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

Show Cancelled Events: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		Create Enrollment
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:

Show Cancelled Events: Yes No

Status	Event	Effective Date
Processed	New Child 	04/14/2023
Cancelled	Gain of Other Coverage	04/01/2023
Processed	Conversion Recalc	04/01/2023
Processed	Conversion	01/01/2023
Processed	Conversion	03/07/2022

 **Status** Coverage

Employee Set: empGtEq20

Status	Date	User	Process	Reference
In Progress	May 3, 2023 4:16:43 PM	Administrator (Christopher Van Sickle)	portalStartEventProc	386460
Processed	May 3, 2023 4:19:49 PM	Administrator (Christopher Van Sickle)	portalCompleteEventProc	386523

- 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.

Plan	Option	Coverage Effective	Total Premium	EE Cost	ER Cost	Status
<input checked="" type="checkbox"/> 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

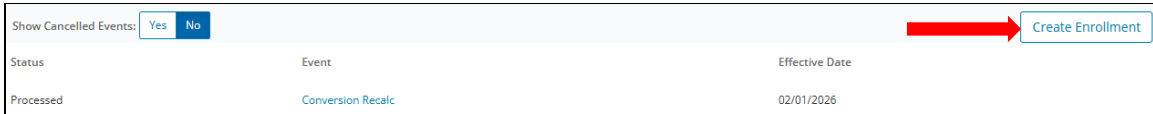
Note the **check marks** and **bold text** indicating the **Elected** options.

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

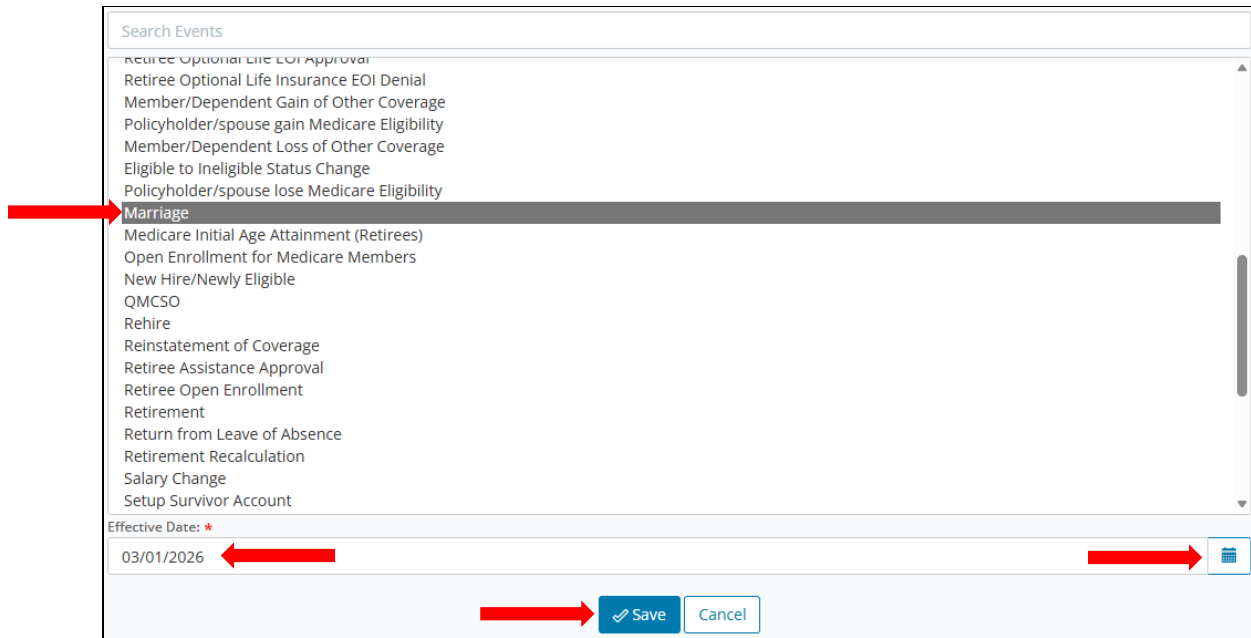
7.2 Create Enrollment

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



The screenshot shows a table with columns for 'Status', 'Event', and 'Effective Date'. The first row contains the text 'Processed', 'Conversion Recalc', and '02/01/2026'. To the right of the table is a 'Create Enrollment' button, which is highlighted with a red arrow.

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



The screenshot shows a search interface for events. A list of events is displayed, with 'Marriage' selected and highlighted. A red arrow points to the 'Marriage' entry. Below the list is an 'Effective Date' field with a calendar icon. The date '03/01/2026' is entered in the field, with a red arrow pointing to the date. At the bottom, there are 'Save' and 'Cancel' buttons, with a red arrow pointing to the 'Save' button.

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.

Marriage, 03/01/2026

This event requires enrollment elections. Who will enter the elections?

Participant Admin

Continue

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

Enrollment

Personalize your benefits plan

Marriage - April 1, 2026

1 Family 2 Benefits

You currently have no dependents on file. You may add a dependent or navigate to a different page.

Add a Dependent

View Profile

Next >

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

Personal Information

***Required Fields**

SSN: *

First Name: *

Initials:

Last Name: *

Relationship: * ?

Gender: * Male Female

Date of Birth * Age: 45 ?
(MM/DD/YYYY):

Email:



Mailing Address (if different from Employee):

[Save and Add Another](#) [Save and Close](#) [Cancel](#)

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

Marriage - April 1, 2026

1 Family 2 Benefits

 <div style="border: 1px solid #ccc; padding: 5px; width: 100%; margin-top: 5px;"> <p style="margin: 0;">You Age: 57</p> <p style="margin: 0;">View Profile</p> </div>	 <div style="border: 1px solid #ccc; padding: 5px; width: 100%; margin-top: 5px;"> <p style="margin: 0;">Spouse Age: 45</p> <p style="margin: 0;">Edit Remove</p> </div>
--	--

[Add a Dependent](#)

[Next >](#)

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

Personalize your benefits plan

Marriage - April 1, 2026

1 Family 2 Benefits

Insurance Benefits

Information 1 To view and/or change beneficiaries for your plan, please visit mybenefits.metlife.com/. All beneficiary changes must be made through MetLife. For more information, please contact MetLife at 888-466-8640.

Information 2 You are only allowed to make changes in PEIA's Section 125 Premium Conversion Plan when you initially enroll for PEIA coverage or during the annual Open Enrollment period.

Benefit	Selection	Coverage Level	Employer Cost	Employee Cost
Basic Life Insurance and AD&D	Basic Life Insurance and AD&D	\$10,000	\$1.98	-
PEIA Section 125 Premium Conversion Plan	Yes	Yes	-	-

Recalculate

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

Health Plans

Health

- Please click the "Select Your Primary Care Provider" button and enter PCP ID information for yourself and any dependents you have elected to cover.

Select your Primary Care Provider

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


Primary Care Provider

Please enter PCP ID information for yourself and any dependents you have elected to cover. Click the search icon to access a link to the provider directory.



+ Required fields


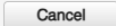
Health				
Name	Relationship	PCP ID	PCP Name	Facility Code
SELF (REQUIRED)	You	<input type="text"/>	<input type="text"/>	<input type="text"/>

Primary Care Provider


Please enter PCP ID information for yourself and any dependents you have elected to cover. Click the search icon  to access a link to the provider directory.


*Required fields

Health				
Name	Relationship	PCP ID	PCP Name	Facility Code
	You	 2271280	<input type="text"/>	<input type="text"/>

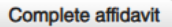
 

11. Type the provider ID number in the **PCP ID** field, and then click the **Save and Close** button. This information may not be known, and the member may add this later.
12. Scroll down to the **Discounts and Surcharges** section. The Tobacco Surcharge information is required.

▼ **Discounts and Surcharges** 

 **Tobacco surcharge**

- To enroll into coverage, you are required to complete an affidavit indicating your family's tobacco status



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

Tobacco surcharge


To enroll into coverage, you are required to complete an affidavit indicating your family's tobacco status

Please select one of the following options:

- Tobacco free (No Tobacco Users within the last 6 months)
 - Policyholder uses Tobacco
 - Dependent uses Tobacco
 - Family uses Tobacco
 - Undisclosed. Please note that no Tobacco Discount will be given until the status is disclosed.

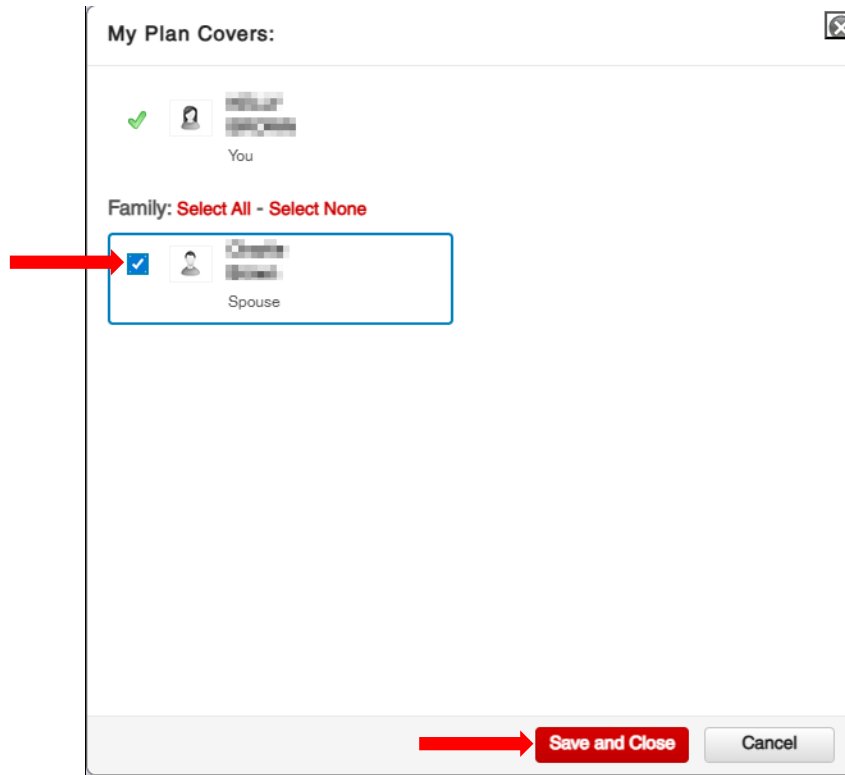
Save and Close Cancel

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

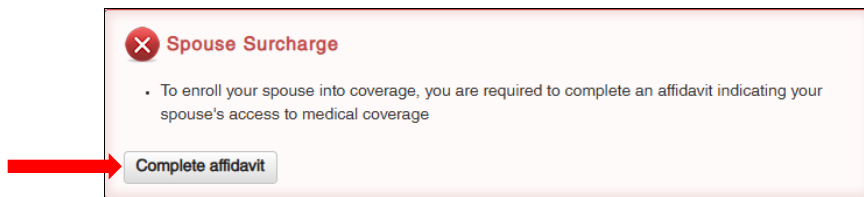
Benefit	Selection	Coverage Level	Employer Cost	Employee Cost
Health ⓘ ⓘ	PPB Silver (forme	Who is covered?  You Change who is covered	\$501.00	\$58.00

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.

Spouse Surcharge

To enroll your spouse into coverage, you are required to complete an affidavit indicating your spouse's access to medical coverage

Please select one of the following options:

- My spouse does not have health coverage available through his/her employer; is not employed, has Medicare, Medicaid, or Tri-Care, or is retired. (No surcharge will be applied.)
- My spouse is employed by a PEIA-participating agency. (No surcharge will be applied.)
- My spouse has health coverage available through his/her employer. (I understand that if my spouse is on my PEIA health coverage, the monthly premium surcharge will be applied to my premium.)
- Undisclosed/No Response. (I understand that if my spouse is on my PEIA health coverage, the monthly premium surcharge will be applied to my premium.)

Save and Close Cancel

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

Benefit	Selection	Coverage Level	Employer Cost	Employee Cost
Health Plan Tobacco Discount	Discount	Discount	-	(\$50.00)
Health Plan Spousal Surcharge	No Spousal Surcharge	No Spousal Surcharge	-	-

◀ Previous **Complete** ▶

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

Enrollment ×

Personalize your benefits plan

Marriage - April 1, 2026

⚠ Non-critical warnings

Based on selections that you made during this event, enrollment form(s) are required to be completed. The required forms can be viewed and printed by accessing the Forms Task below.

Print your confirmation statement

The selections you made have been submitted successfully.

Event name: Marriage

Effective date: April 1, 2026

Date completed: March 4, 2026

[If you wish, you can print a summary of your new selections.](#)

Your new selections will appear in your **Personal Profile** once processed.

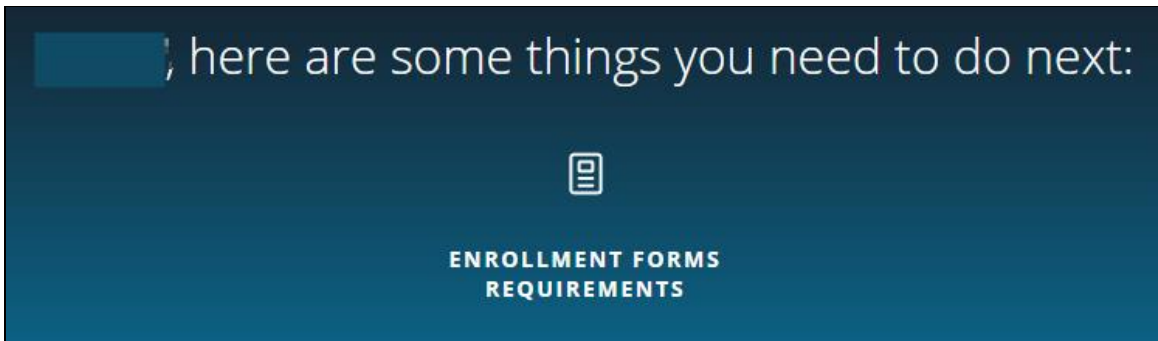
Done

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

Show Cancelled Events: [Create Enrollment](#)

Status	Event	Effective Date
Pending Approval	Marriage	04/01/2026

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.

Organization Details
BERKELEY CO BOARD OF EDUCATION

Search Tools

Organization Information

- Company Details
- Documents
- Users
- Participants
- Communications
- Logs

Basic

Organization Type: Employer

Organization Description: BERKELEY CO BOARD OF EDUCATION

Organization ID: 800030005

Organization Status: -

Organization Status Date: Sep 1, 1988

Organization Name: -

Additional

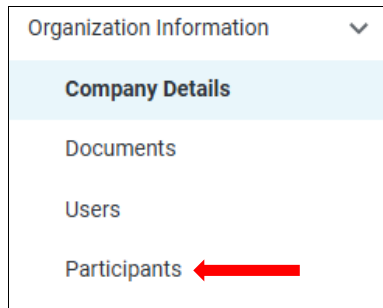
Navigate timeline or select date: < 09/01/1988 >

Branch Code 005-State	Sep 1, 1988	Retiree Eligibility Indicator Yes	Sep 1, 1988	Interoffice Indicator No	Sep 1, 1988	Oasis Payroll Flag No	Sep 1, 1988
Federal Employer Identification Number 556000297	Sep 1, 1988	Employer Type STATE AGENCY	Sep 1, 1988	PEIA State Aid Auto Allocate -	-	HRIS Employer -	-

Company Contact

Contact Type	Address	Email	Phone	Fax	Primary Contact	Action
Billing Contact	1453 WINCHESTER AVE, MARTINSBURG, WV, 25405	test@test.com	-	-	Test Billing	
Billing Contact	1453 WINCHESTER AVE, MARTINSBURG, WV, 25405	test@test.com	-	-	Test Billing	

Explore the other menu options:



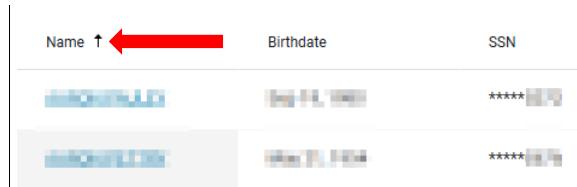
2. Click **Participants** on the organization navigation menu. The list of the organization's participants displays.

Name	Birthdate	SSN	Employee ID	Status	Eligibility
JAMES W. SMITH	Jan 17, 1950	****-**-****	*****	Terminated	Not eligible
JAMES W. SMITH	Jun 20, 1948	****-**-****	*****	Terminated	Not eligible
JAMES W. SMITH	Apr 2, 1968	****-**-****	*****	Terminated	Not eligible
JAMES W. SMITH	Mar 31, 1958	****-**-****	*****	Terminated	Retiree
JAMES W. SMITH	Jun 11, 1950	****-**-****	*****	Terminated	Not eligible

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

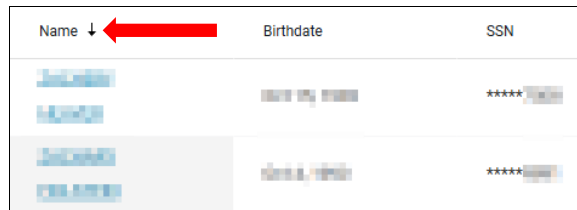
Column headings may be used to change the sort order. For example, to arrange the participants alphabetically by first name:

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



Name ↑	Birthdate	SSN
JOHN DOE	1980-01-01	*****
JANE SMITH	1985-02-02	*****

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



Name ↓	Birthdate	SSN
JANE SMITH	1985-02-02	*****
JOHN DOE	1980-01-01	*****

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

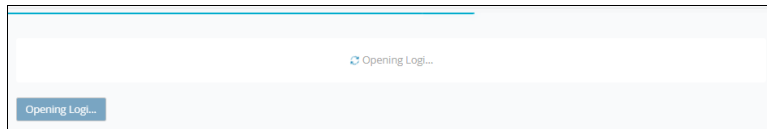
Similar functionality is available for the **Users** tab. (User Management is covered in a later section.)

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.

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.

Menu

Employee Extract

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

Optionally select a specific employer

Optionally select a specific eligibility set

Optionally select Work Statuses to report

Optionally enter a specific Employee Number

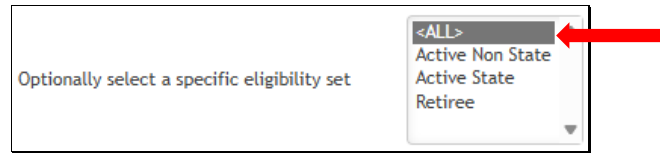
Select as of date

Select language

Run Report

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.

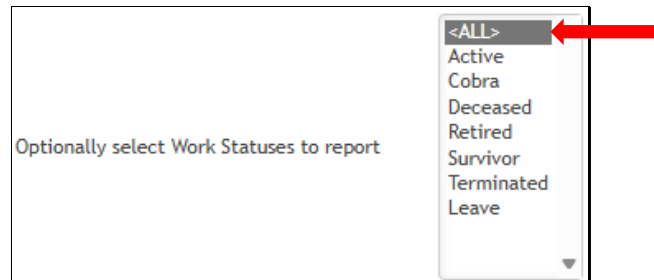
2. Select a set name in the **Eligibility** field.
All is the default, used in this example.



A screenshot of a web form showing a dropdown menu for the 'Eligibility' field. The text 'Optionally select a specific eligibility set' is on the left. The dropdown menu is open, showing the following options: '<ALL>', 'Active Non State', 'Active State', and 'Retiree'. A red arrow points to the '<ALL>' option.

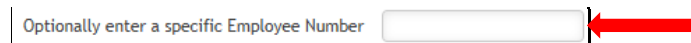
You may click on one set to select it, or hold the keyboard's **Ctrl** key and click to make a multiple selection.

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



A screenshot of a web form showing a dropdown menu for the 'Work Statuses' field. The text 'Optionally select Work Statuses to report' is on the left. The dropdown menu is open, showing the following options: '<ALL>', 'Active', 'Cobra', 'Deceased', 'Retired', 'Survivor', 'Terminated', and 'Leave'. A red arrow points to the '<ALL>' option.

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.



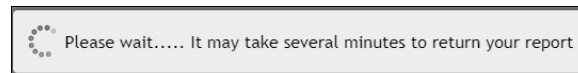
A screenshot of a web form showing a text input field for the 'Specific Employee' field. The text 'Optionally enter a specific Employee Number' is on the left. A red arrow points to the input field.

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



A screenshot of a web form showing the 'Select as of date' field with the date '2026-01-12' and a calendar icon. Below it is the 'Select language' dropdown menu with options 'English', 'Français', and 'English CA'. A red arrow points to the calendar icon. At the bottom left is a 'Run Report' button with a red arrow pointing to it.

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.



A screenshot of a loading message box. It contains a circular loading icon and the text 'Please wait..... It may take several minutes to return your report'.

When the processing is complete, the report displays.

Report Menu Change Criteria Private Bookmark Public Bookmark Reset Layout

Employee Extract

f(x) Formula Filter Add Chart

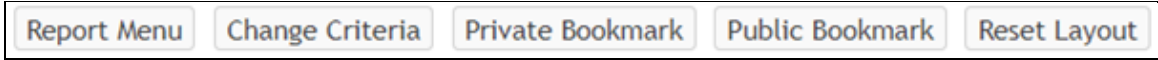
Table

Page 1 of 20

Employee ID	Employee Name	Employee ID	Last Name	First Name	Middle Name	Suffix	SSN	Street Address Line 1	Street Address Line 2	City	State	Country	ZIP Code	Address Type	Address Change Date	Bad Home Address Indicator	Mailing Preference Indicator
800050005	BOONE CO BOARD OF EDUCATION										OR	UNITED STATES		Mailing	1997-01-17		Yes
800050005	BOONE CO BOARD OF EDUCATION										OR	UNITED STATES		Mailing	2021-02-10		Yes
800050005	BOONE CO BOARD OF EDUCATION										OR	UNITED STATES		Mailing	2022-04-26		Yes
800050005	BOONE CO BOARD OF EDUCATION										OR	UNITED STATES		Mailing	2018-07-18		Yes
800050005	BOONE CO BOARD OF EDUCATION										OR	UNITED STATES		Mailing	2004-01-27		Yes
800050005	BOONE CO BOARD OF EDUCATION										OR	UNITED STATES		Mailing	2004-04-28		Yes
800050005	BOONE CO BOARD OF EDUCATION										OR	UNITED STATES		Mailing	2004-04-22		Yes
800050005	BOONE CO BOARD OF EDUCATION										OR	UNITED STATES		Mailing	1999-01-05		Yes
800050005	BOONE CO BOARD OF EDUCATION										OR	UNITED STATES		Mailing	1983-11-01		Yes
800050005	BOONE CO BOARD OF EDUCATION										OR	UNITED STATES		Mailing	1975-09-01		Yes

9.1.1 Report Menu, Change Criteria, and Reset Layout Buttons

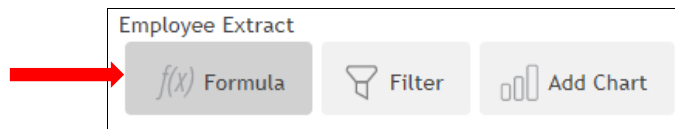
The buttons at the top of the report screen perform the following functions:



- 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

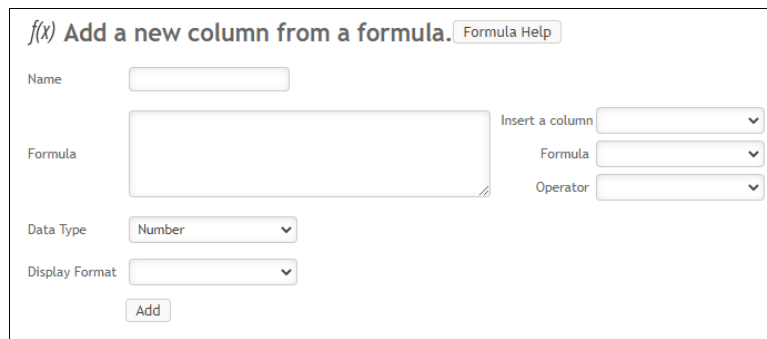
9.1.2 Formula, Filter, and Add Chart Buttons

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.)

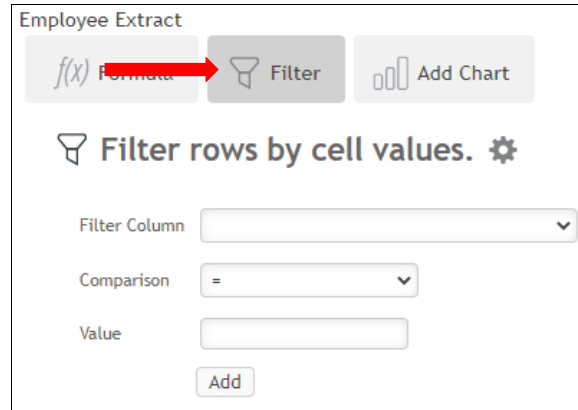
1. Click the **Formula** button.
The Add a new column from a formula fields display.



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

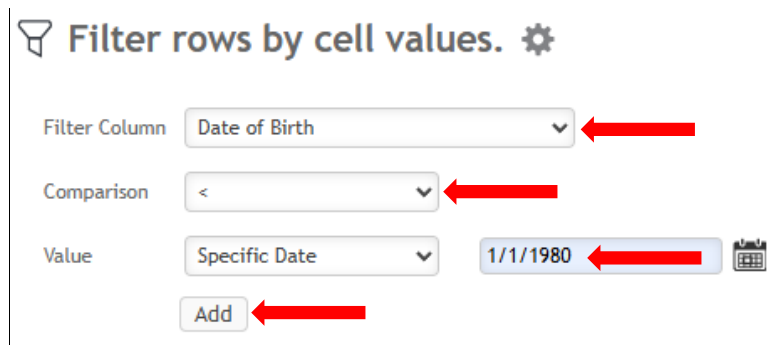
The Filter function allows for filtering the report with specific criteria.

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

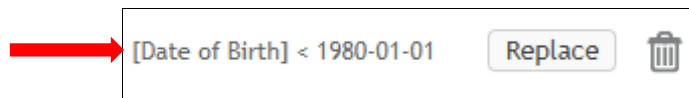


For example, filter the table to display only female participants born before 1980:

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.

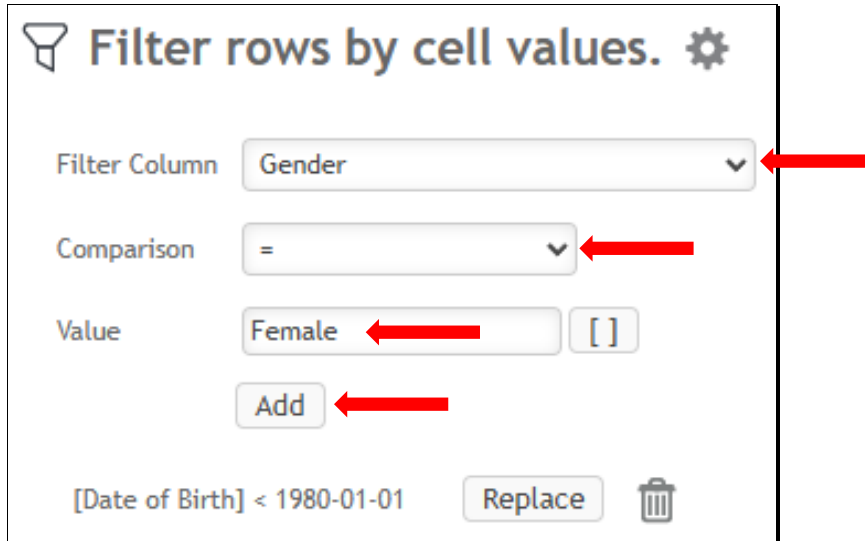


5. Click the **Add** button.
The added criteria displays below the filter fields, and the table displays only those participant records that meet the filter criteria for Date of Birth.



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.



Filter rows by cell values. ⚙

Filter Column: Gender

Comparison: =

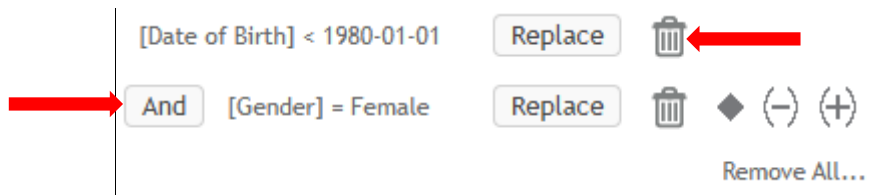
Value: Female

Add

[Date of Birth] < 1980-01-01 Replace

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:

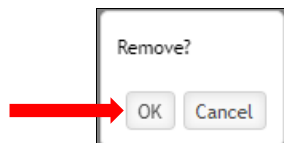


[Date of Birth] < 1980-01-01 Replace

And [Gender] = Female Replace

Remove All...

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.



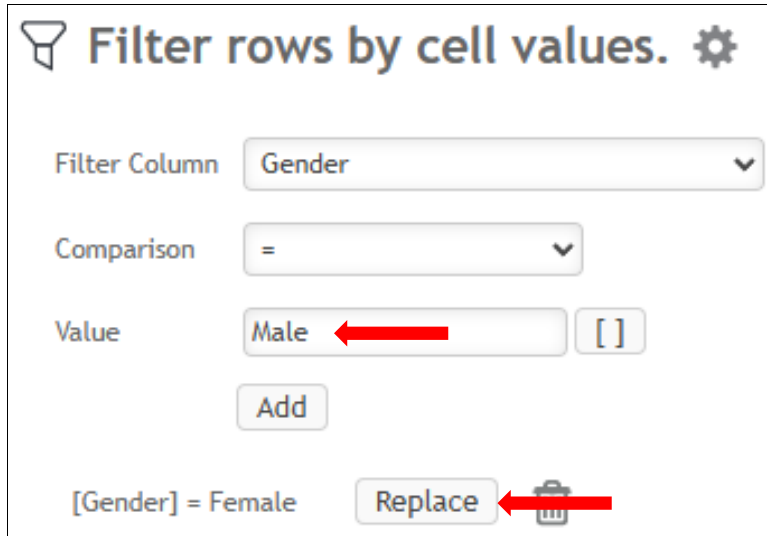
Remove?

OK Cancel

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.



Filter rows by cell values.

Filter Column: Gender

Comparison: =

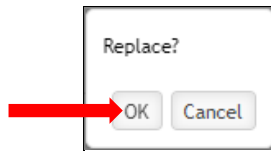
Value: Male

Add

[Gender] = Female

Replace

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



Replace?

OK Cancel

14. Click the **OK** button.
The table redisplay 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.

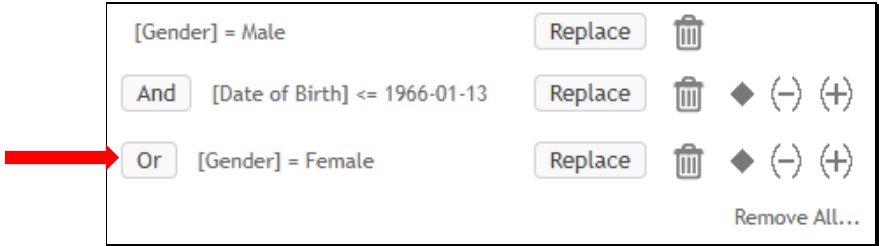
1. Click the **Filter** button.
2. Click the drop-down arrow in the **Filter Column** field, and select **Gender**.
3. Click the drop-down arrow in the **Comparison** field, and select = (equal sign).
4. Type **Male** in the **Value** field.
5. Click the **Add** button.

The screenshot shows a filter configuration window titled "Filter rows by cell values." with a gear icon. It contains three input fields: "Filter Column" with a dropdown menu set to "Gender", "Comparison" with a dropdown menu set to "=", and "Value" with a text input field containing "Male" and a clear button "[]". Below these fields is an "Add" button. At the bottom, there is a summary of the filter rule: "[Gender] = Male", followed by "Replace" and a trash icon.

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.

The screenshot shows the same filter configuration window, now with two filter rules. The first rule is "[Gender] = Male" with "Replace" and a trash icon. The second rule is "[Date of Birth] <= 1966-01-13" with "Replace", a trash icon, and a date picker icon. The two rules are linked by an "And" operator. Below the rules are "Add", "Remove All...", and navigation buttons "(-)" and "(+)".

- 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.

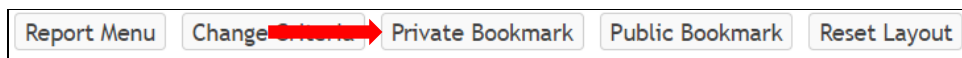


In this example, selecting Date of Birth a second time results in the Or button too.

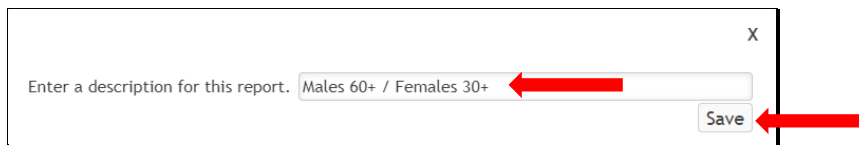
18. Click the **Or** button to convert it to an And operator.



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.



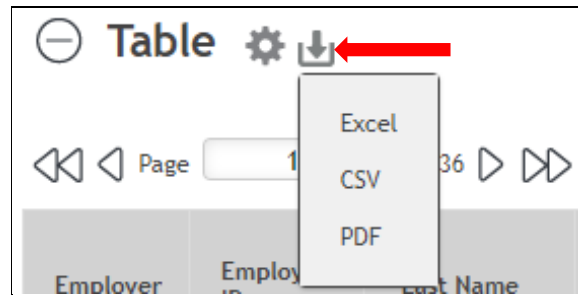
- Click the single right arrow to advance the display by one page
- Click the double right arrow to advance to the last page of the display
- Click the single left arrow to back up the display by one page
- Click the double left arrow to return to the first page of the display

The minus sign hides the display of the table.



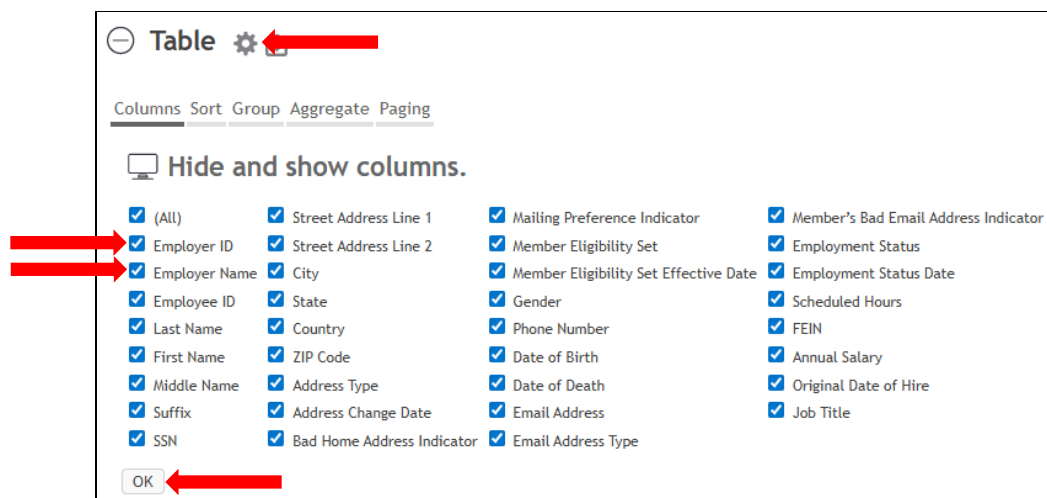
- Click the minus sign to hide the table (minus sign replaced by a plus sign)
- Click the plus sign to redisplay the table

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.

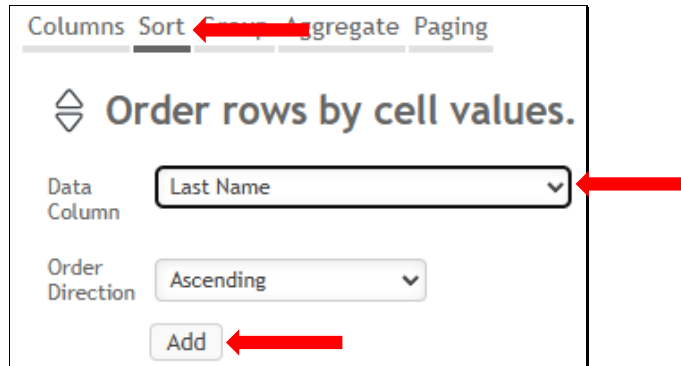


1. Click the **Show/hide options** icon.
The menu displays; Columns is the default option.

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.

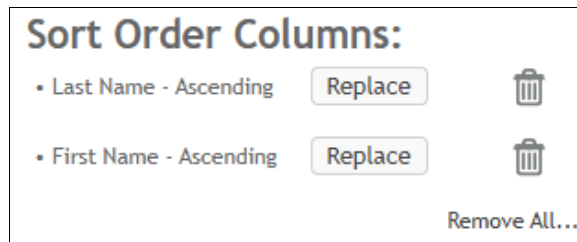
Sort allows for arranging the table rows in a specific order according to the contents of one or more columns. For example, change the table to alphabetical order by Last Name.



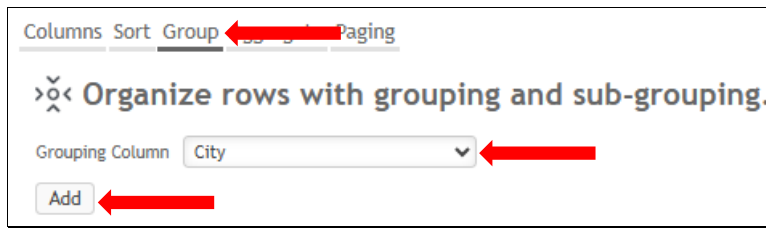
1. Click **Sort**.
The Order rows by cell values fields display.
2. Click the drop-down arrow in the **Data Column** field, and select **Last Name**.
Order Direction is defaulted to Ascending, which is alphabetical A-Z.
3. Click the **Add** button.
The table redisplayes the participant records in order 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 redisplayes 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.

City	Employee ID	Last Name	First Name	Middle Name	Suffix	SSN	Street Address Line 1	Street Address Line 2	State	Country	ZIP Code	Address Type	Address Change Date	Bad Home Address Indicator	Mailing Preference Indicator	Member Eligibility Set
ALKOL																
										UNITED STATES		Mailing	1981-09-01		Yes	
										UNITED STATES		Mailing	2019-09-27		Yes	Active State
										UNITED STATES		Mailing	2019-09-27		Yes	Active State
										UNITED STATES		Mailing	2007-03-02		Yes	
										UNITED STATES		Mailing	2006-06-15		Yes	Retiree
										UNITED STATES		Mailing	2015-09-11		Yes	Active State
										UNITED STATES		Mailing	2014-05-01		Yes	
ALUM CREEK																
										UNITED STATES		Mailing	2016-01-01		Yes	Active State
										UNITED STATES		Mailing	2013-04-30		Yes	Active State
										UNITED STATES		Mailing	2014-12-09		Yes	
										UNITED STATES		Mailing	2024-07-01		Yes	Active State
										UNITED STATES		Mailing	2015-04-20		Yes	Active State
										UNITED STATES		Mailing	2005-12-13		Yes	
										UNITED STATES		Mailing	2010-04-01		Yes	Active State
										UNITED STATES		Mailing	2004-09-01		Yes	Active State
										UNITED STATES		Mailing	2004-11-10		Yes	Retiree

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.

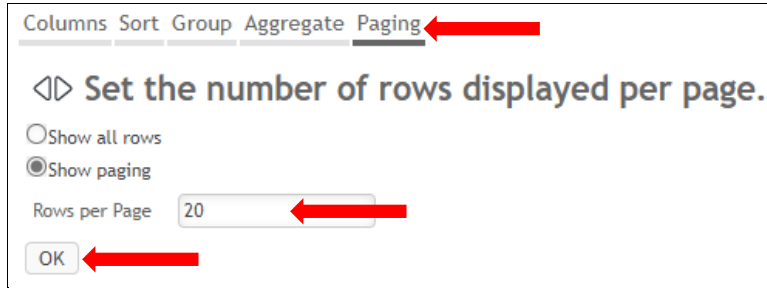
1. Click **Aggregate**.
The Calculate totals, averages and such for the top and grouped levels fields display.

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.

City	Employee Last Name
Count: 26	
Count: 0	Patterson
Allen Park Count: 1	Lambert
Birch Run Count: 1	Patterson
Clayton Count: 1	Baker
Detroit Count: 4	Lambert
	Patterson
	Lambert
	Patterson
	Lambert

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.



A screenshot of the "Enrollment Status Extract" menu screen. The screen has a title bar "Menu" and a main heading "Enrollment Status Extract". Below the heading is a sub-heading "Select your initial filter criteria below and click the Run Report button to return the results. Further filtering can be done after the initial results are returned." There are four filter sections, each with a dropdown menu:


- "Optionally select a specific employer": dropdown menu with "<ALL>" and "BERKELEY CO BOARD OF EDUCATION".
- "Optionally select a specific eligibility set": dropdown menu with "<ALL>", "Active Non State", "Active State", and "Retiree".
- "Optionally select employment statuses to report": dropdown menu with "<ALL>", "Active", "Cobra", "Deceased", "Retired", "Survivor", and "Terminated".
- "Optionally select event(s) to report": dropdown menu with "<ALL>" and a list of events including "Adding Coverage for a Dependent Child", "Address Change", "Address Change - Automatic", "Admin Internal Cleanup", "Administrative Appeal", "Administrative Overrides", "Adoption", "Age Band Change with Cost Implications", and "Age Band Volume Reduction".

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


A screenshot of the "Optionally select event(s) to report" dropdown menu. The menu is open, showing a list of events. A red arrow points to the "New Hire/Newly Eligible" option, which is highlighted. The list of events includes: "Leave Conversion Discount Expiration", "Marriage", "Medicare Initial Age Attainment (Retirees)", "Member/Dependent Gain of Other Coverage", "Member/Dependent Loss of Other Coverage", "New Hire/Newly Eligible", "Newborn SSN Submission", "Newly Disabled Child", "Open Enrollment", "Open Enrollment for Medicare Members", and "Open Enrollment under spouse's employer's benefit plan".

Select start date for election retrieval is based on event effective date  

Select end date for election retrieval is based on event effective date  



Select as of date 

Select language



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

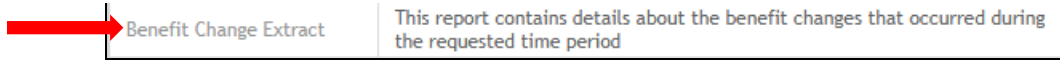
3. Click the **Run Report** button.

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						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						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.

A screenshot of the "Benefit Change Extract" menu screen. The screen has a title bar "Menu" and a main heading "Benefit Change Extract". Below the heading is a sub-heading "Benefit Change Extract" and a paragraph: "Select your initial filter criteria below and click the Run Report button to return the results. Further filtering can be done after the initial results are returned." The form contains several fields: "Optionally select a specific employer" with a dropdown menu showing "<ALL>" and "BERKELEY CO BOARD OF EDUCATION"; "Optionally select a specific work status" with a dropdown menu showing "<ALL>", "Active", "Cobra", "Deceased", "Retired", "Survivor", and "Terminated"; "Select type(s) of change" with a dropdown menu showing "Added", "Changed", and "Deleted"; "Optionally enter a specific member ID" with a text input field; "Select Start date to report" with a date field containing "2026-02-02" and a calendar icon; "Select End date to report" with a date field containing "2026-03-04" and a calendar icon; and "Select language" with a dropdown menu showing "English", "Français", and "English CA". At the bottom left is a "Run Report" button. Red arrows point to the calendar icons for the start and end dates, and to the "Run Report" button.

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 Pending - Prior	Employer Premium - Prior	Premium - Prior	Benefit - New	Plan - New	Option - New
800030005	BERKELEY CO BOARD OF EDUCATION					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					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					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					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					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					Active	Conversion	2003-01-01	Optional Life and ADBD Insurance	Optional Life and ADBD Insurance	\$20,000	0	0	0	0	Optional Life and ADBD Insurance	Optional Life and ADBD Insurance	\$50,000
800030005	BERKELEY CO BOARD OF EDUCATION					Active	Conversion	2003-04-01	Optional Life and ADBD Insurance	Optional Life and ADBD Insurance	\$50,000	0	0	0	0	Optional Life and ADBD Insurance	Optional Life and ADBD Insurance	\$150,000
800030005	BERKELEY CO BOARD OF EDUCATION					Active	Conversion	2007-01-01	Optional Life and ADBD Insurance	Optional Life and ADBD Insurance	\$150,000	0	0	0	0	Optional Life and ADBD Insurance	Optional Life and ADBD Insurance	\$200,000

9.3 Workflow Reports

Use the Workflow Status Report to show current business processes.

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

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

Menu

Workflow Status Report
Select initial filter criteria and click "Run Report".
No selection is equivalent to selecting all entries.

Business Process:

Start Date:

End Date:

Event:

Request Status:

Activity Status:

Employee Id:

Employer Id:

Member Id:

Request ID:

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

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	2024-02-19 14:05	2024-02-19 14:05				800030005		
Birth, Adoption, Guardianship, Court Ordered Child	Enrollment	618342	In-Progress	Submit Enrollment	Completed	2024-02-19 14:08	2024-02-19 14:08				800030005		
Birth, Adoption, Guardianship, Court Ordered Child	Enrollment	618342	In-Progress	Waiting for Required Documents	Completed	2024-02-19 14:08	2024-02-19 14:08				800030005		
Birth, Adoption, Guardianship, Court Ordered Child	Enrollment	618342	In-Progress	Request for Information Initiated	Completed	2024-02-19 14:08	2024-02-19 14:08				800030005		
Birth, Adoption, Guardianship, Court Ordered Child	Enrollment	620413	In-Progress	Start Enrollment	Completed	2024-02-26 10:29	2024-02-26 10:29				800030005		
Birth, Adoption, Guardianship, Court Ordered Child	Enrollment	620413	In-Progress	Submit Enrollment	Completed	2024-02-26 10:30	2024-02-26 10:30				800030005		
Birth, Adoption, Guardianship, Court Ordered Child	Enrollment	620413	In-Progress	Waiting for Required Documents	Completed	2024-02-26 10:30	2024-02-26 10:30				800030005		
Birth, Adoption, Guardianship, Court Ordered Child	Enrollment	620413	In-Progress	Request for Information Initiated	Completed	2024-02-26 10:30	2024-02-26 10:30				800030005		
Birth, Adoption, Guardianship, Court Ordered Child	Enrollment	620413	In-Progress	Document Received	Completed	2024-02-26 10:36	2024-02-26 10:36				800030005		
Birth, Adoption, Guardianship, Court Ordered Child	Enrollment	620413	In-Progress	Document accepted	Completed	2024-02-26 10:36	2024-02-26 10:36				800030005		
Birth, Adoption, Guardianship, Court Ordered Child	Enrollment	620420	In-Progress	Start Enrollment	Completed	2024-02-26 14:01	2024-02-26 14:01				800030005		
Birth, Adoption, Guardianship, Court Ordered Child	Enrollment	620420	In-Progress	Submit Enrollment	Completed	2024-02-26 14:38	2024-02-26 14:38				800030005		
Birth, Adoption, Guardianship, Court Ordered Child	Enrollment	620420	In-Progress	Waiting for Required Documents	Completed	2024-02-26 14:38	2024-02-26 14:38				800030005		
Birth, Adoption, Guardianship, Court Ordered Child	Enrollment	620420	In-Progress	Request for Information Initiated	Completed	2024-02-26 14:38	2024-02-26 14:38				800030005		
Birth, Adoption, Guardianship, Court Ordered Child	Enrollment	620420	In-Progress	Document Received	Completed	2024-02-26 14:42	2024-02-26 14:42				800030005		

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.

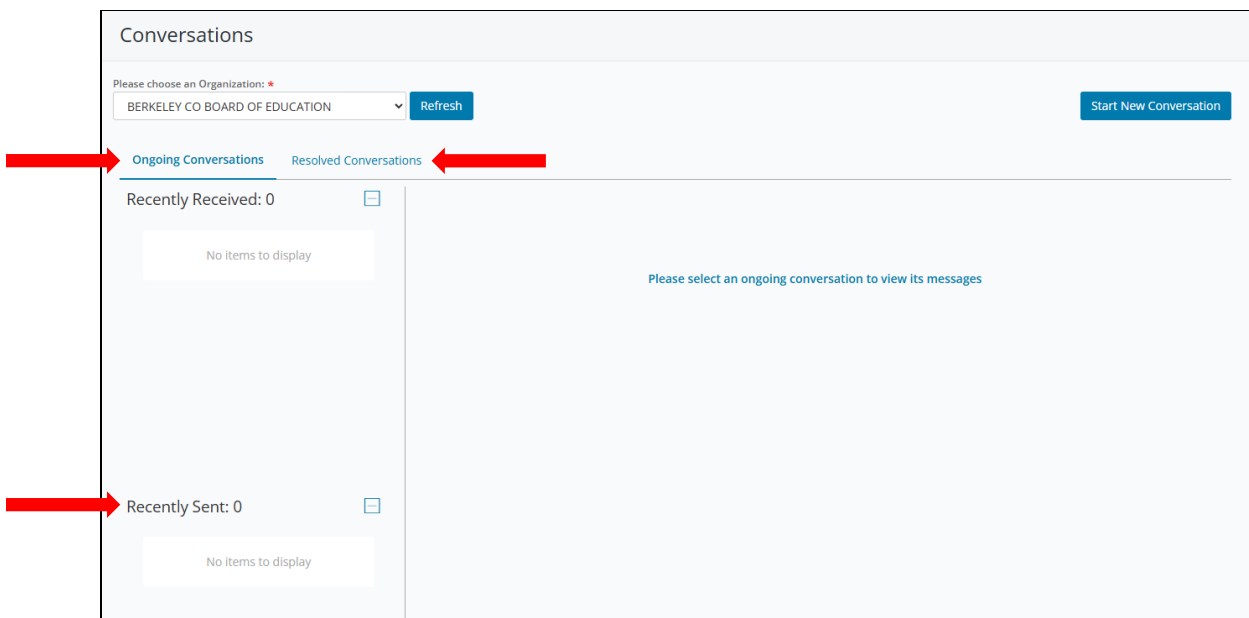
10 Secure Messaging

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.



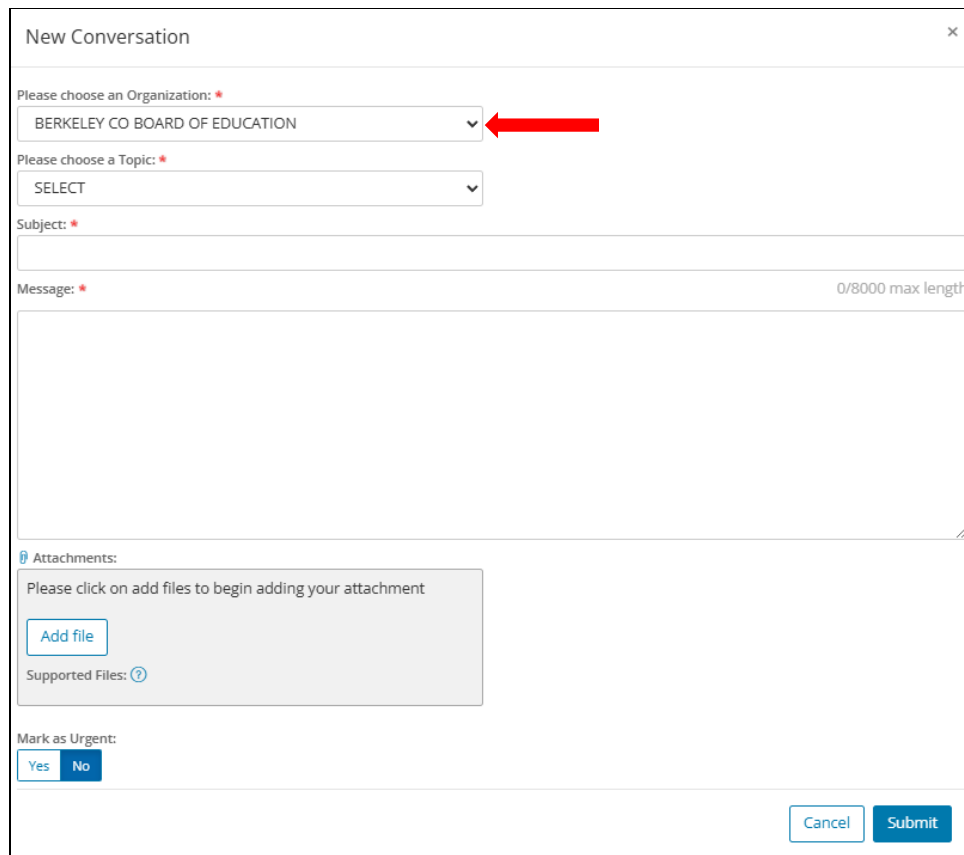
New and open conversations display on the **Ongoing Conversations** tab, and will appear in the Recently Received and/or Recently Sent sections. Resolved conversations display on the **Resolved Conversations** tab.

10.1 Start New Conversation



The screenshot shows a web interface titled "Conversations". At the top, there is a header "Conversations". Below it, there is a form with a label "Please choose an Organization: *". The dropdown menu is set to "BERKELEY CO BOARD OF EDUCATION". To the right of the dropdown is a "Refresh" button. Further to the right, there is a blue button labeled "Start New Conversation" with a red arrow pointing to it from the left.

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



The screenshot shows a "New Conversation" dialog box. It has a title bar with "New Conversation" and a close button "x". The form contains several fields: "Please choose an Organization: *" with a dropdown menu showing "BERKELEY CO BOARD OF EDUCATION" and a red arrow pointing to the dropdown arrow; "Please choose a Topic: *" with a dropdown menu showing "SELECT"; "Subject: *" with an empty text input field; "Message: *" with a large text area and a character count "0/8000 max length"; "Attachments:" section with a button "Add file" and "Supported Files: ?"; and "Mark as Urgent:" section with "Yes" and "No" radio buttons. At the bottom right, there are "Cancel" and "Submit" buttons.

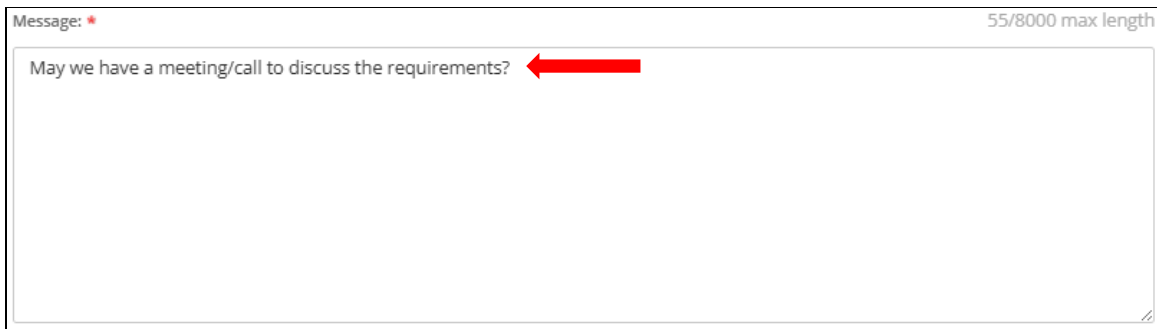
2. Click the drop-down arrow in the **Please choose a Topic** field, and select the appropriate topic.



The screenshot shows a close-up of the "Please choose a Topic: *" dropdown menu, which is now open and shows "Mountaineer Flexible Benefits" as the selected option. A red arrow points to the dropdown arrow. Below it, the "Subject: *" text input field contains the text "Meet to Discuss Benefit Requirements" and has a red arrow pointing to it.

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

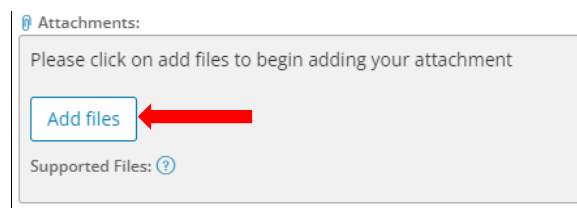
4. Type the message contents in the **Message** field.



Message: * 55/8000 max length

May we have a meeting/call to discuss the requirements? ←

If one or more attachments are required:



Attachments:

Please click on add files to begin adding your attachment

Add files ←

Supported Files: ?

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.



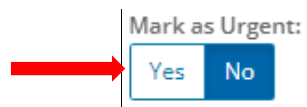
Attachments:

Birth_Certificate.pdf ←

Add file

Supported Files: ?

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



Mark as Urgent:

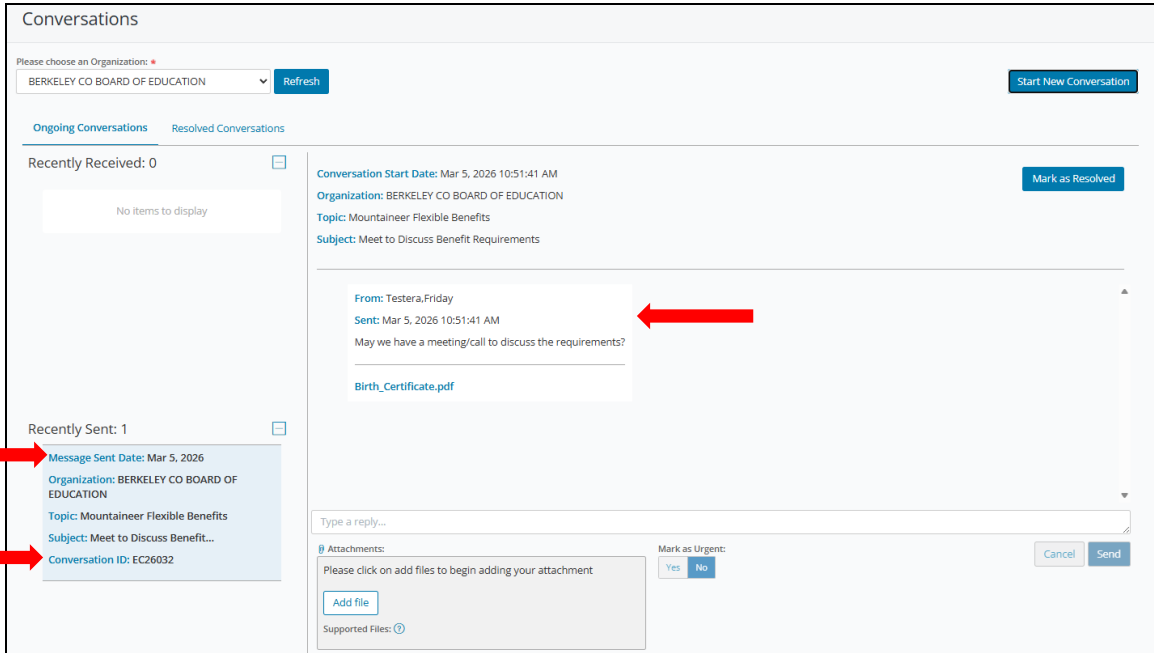
Yes No

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



Cancel Submit ←

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

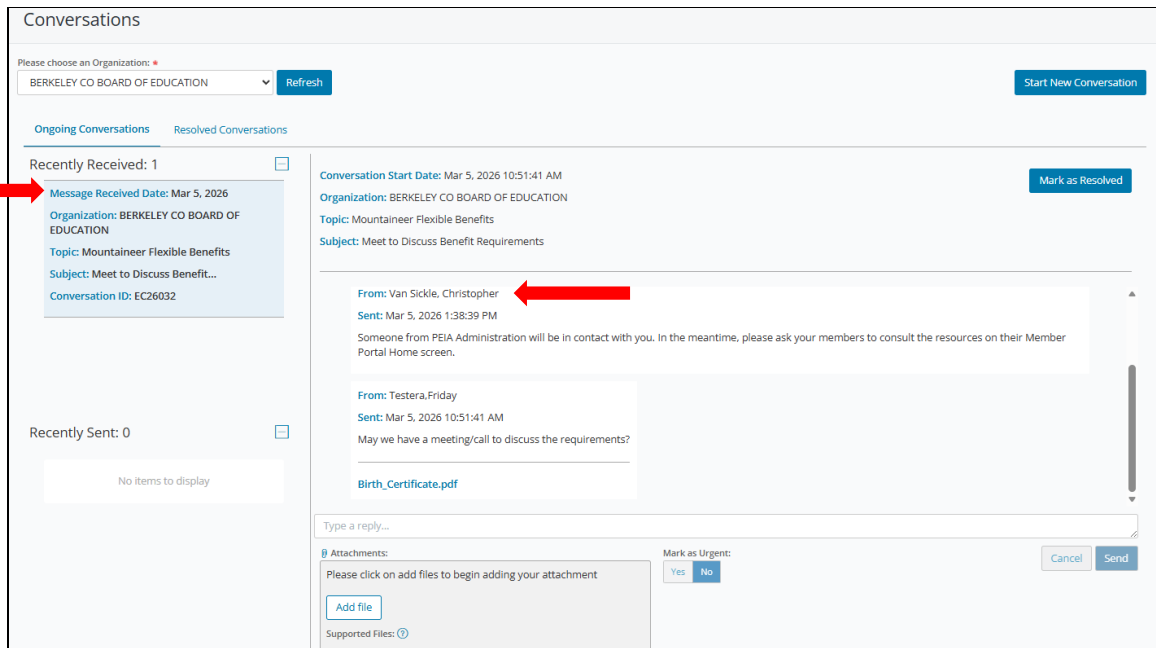


Note the **Conversation ID**. When an PEIA administrator reviews their Conversations as part of their workflow, the administrator will see the same Conversation ID in the employer's Log History.

10.2 Receive the Reply and Resolve

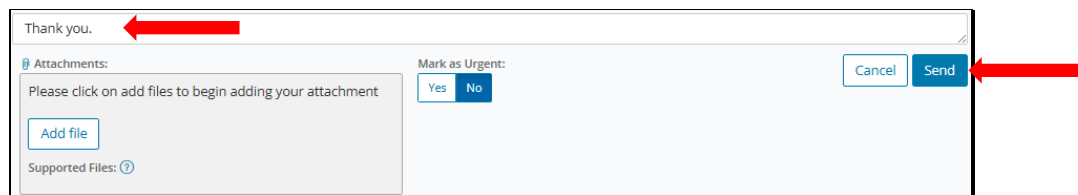
When the PEIA administrator has replied to the message, return to the Conversations screen.

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



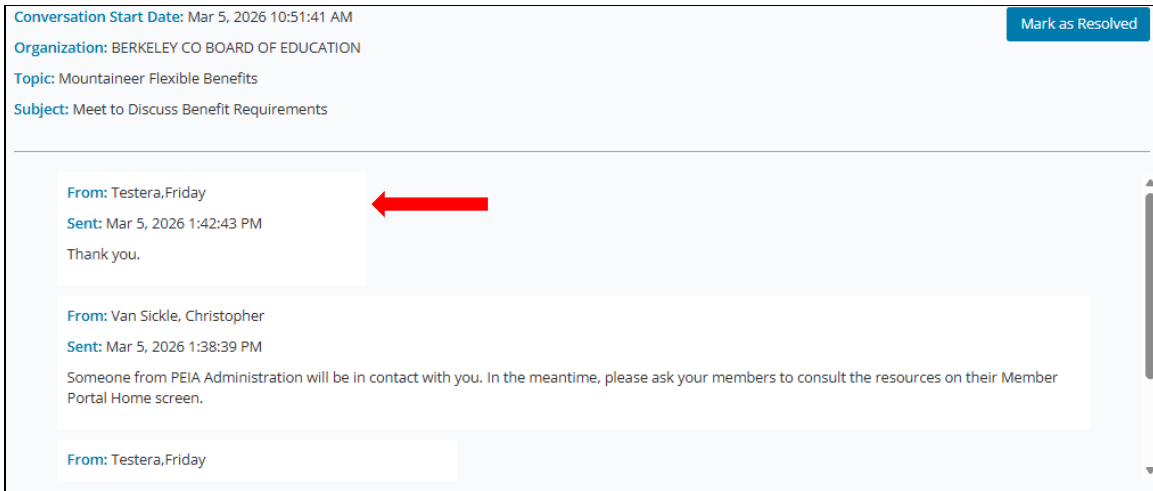
The screenshot shows the 'Conversations' interface. At the top, there is a dropdown menu for 'Please choose an Organization:' set to 'BERKELEY CO BOARD OF EDUCATION' with a 'Refresh' button and a 'Start New Conversation' button. Below this are tabs for 'Ongoing Conversations' and 'Resolved Conversations'. On the left, under 'Recently Received: 1', a message is highlighted with a red arrow. The message details are: 'Message Received Date: Mar 5, 2026', 'Organization: BERKELEY CO BOARD OF EDUCATION', 'Topic: Mountaineer Flexible Benefits', 'Subject: Meet to Discuss Benefit...', and 'Conversation ID: EC26032'. The main view shows the conversation details: 'Conversation Start Date: Mar 5, 2026 10:51:41 AM', 'Organization: BERKELEY CO BOARD OF EDUCATION', 'Topic: Mountaineer Flexible Benefits', and 'Subject: Meet to Discuss Benefit Requirements'. The message content shows a reply from 'Van Sickle, Christopher' with the text: 'Someone from PEIA Administration will be in contact with you. In the meantime, please ask your members to consult the resources on their Member Portal Home screen.' Below this is a message from 'Testera, Friday' asking for a meeting. An attachment 'Birth_Certificate.pdf' is visible. At the bottom, there is a 'Type a reply...' field, an 'Attachments' section with an 'Add file' button, and a 'Mark as Urgent' section with 'Yes' and 'No' buttons. A 'Send' button is also present.

If necessary to reply to the conversation:

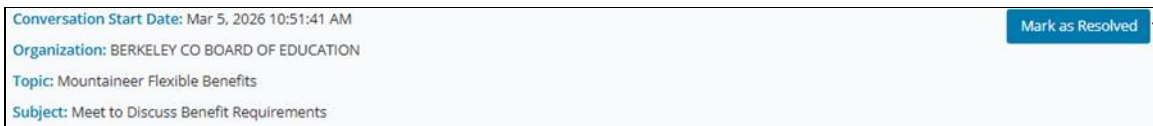


The screenshot shows the reply input field. The text 'Thank you.' is entered in the 'Type a reply...' field, with a red arrow pointing to it. Below the field is the 'Attachments' section with an 'Add file' button. To the right is the 'Mark as Urgent' section with 'Yes' and 'No' buttons. At the bottom right, there are 'Cancel' and 'Send' buttons, with a red arrow pointing to the 'Send' button.

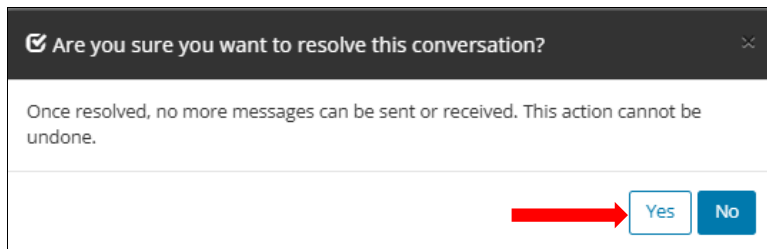
2. Type the reply text in the **Type a reply** field.
Use the **Add files** button in the **Attachments** section if necessary to include files with the reply.
3. Click the **Send** button.
The reply text displays above the original conversation.



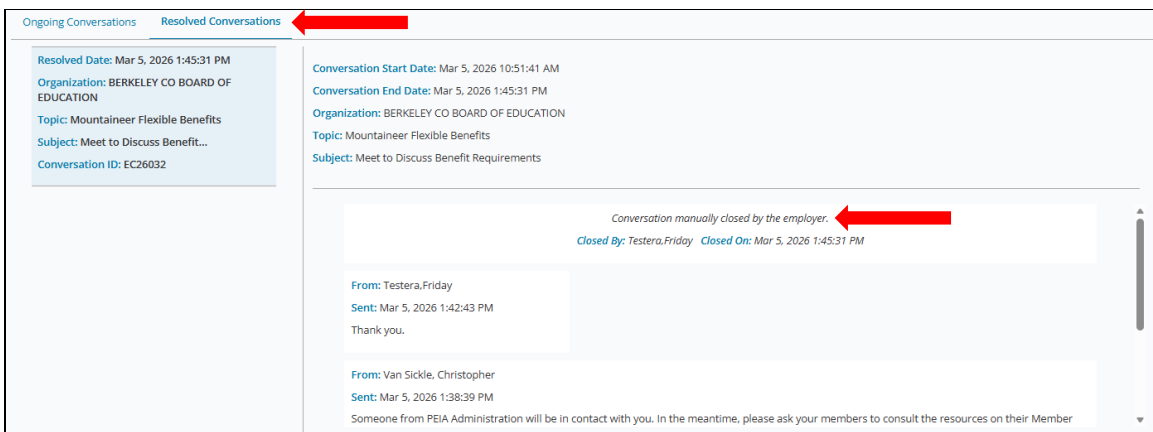
To resolve the conversation:



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.