

- **Investigating retired employees billing discrepancy issues** The group will evaluate misconfigured affiliations with retirees causing unexpected billing issues and investigate solutions with programmers.
- **Evaluating firewall URL white-listing requests** The administration will consider white-listing internal IT firewall URLs to prevent access issues.
- **Assessing increased frequency of banter sessions** The team will look into increasing the frequency of benefit administrator banter sessions depending on scheduling availability.

Details

- **Website Resources and Customer Solutions Contact Guidelines:** Jill Beaty instructed participants to utilize the official PEIA website tools, directing them to select the Partner and then Benefit Administrator News and Resources page for Banter meeting information, past meeting notes, and newsletters. Jill Beaty warned participants not to call the Customer Solutions Department due to high call volumes, advising them instead to contact their eligibility or premium account representatives directly. Jill Beaty also highlighted updated employer billing training guides and a live Quick Reference Guide covering topics such as terminations, transfers, and reconciliations.
- **ACCESS Portal Login and Password Criteria:** Jill Beaty addressed login issues for the PEIA ACCESS system, explaining that the employer portal requires a username consisting of the benefit coordinator's email address, with non-state agencies permitted to use work emails containing their name or initials rather than generic addresses. For first-time users, Jill Beaty instructed them to click the "forgot password" link and copy-paste it into a *new internet browser window* to prevent system errors. Jill Beaty noted that passwords must be between eight and 12 characters long and include uppercase and lowercase letters, a number, and a non-alphanumeric character.
- **Utilization of the Conversations Feature and Termination Procedures:** Jill Beaty introduced PEIA staff members present, including Jason Haught, Trina Sweeney, Cathy Hearnshaw, and Courtney Blankenship. Jill Beaty explained that the ACCESS "Conversations" tab is a secure communication channel for sending member and billing information, noting that August response delays were caused by processing blackout-period enrollments. Regarding employee terminations, Jill Beaty instructed users to select a termination reason from the dropdown menu to ensure proper COBRA packet processing and noted that shifting an employee from full-time to part-time also requires terminating coverage with that specific reason.
- **State Agency Interface Mapping and Inter-Agency Electronic Transfer Auditor Requirements:** Jason Haught addressed state agency interface issues caused by incorrect mapping of multiple facilities rolled up under one department,

which generated erroneous transfers that the ACCESS team has since corrected. Jason Haught outlined upcoming file loads, including an I247 file, a Monday file, and a special 102 billing file for early payroll on Tuesday, advising users to make missing entries in OASIS after running preliminaries on the 22nd. Regarding state auditor requirements for Inter-Agency Electronic Transfers (IET), Jason Haught reminded users to attach the payment coupon, ensure the IET total matches the payment coupon total, and place the payment coupon number in the legal name field, while clarifying that detailed participant lists are not required. Furthermore, Jason Haught advised waiting until all payroll holding files (I249s) are posted before making IET payments.

- **Payment Coupon Locations and Ratio Report Alternatives:** Jason Haught and Jill Beaty discussed billing tools, noting that payment coupons for IET lockboxes are located under the forms section of the billing page, and the revised employer billing training guide includes steps for reallocating misapplied payments. Addressing user complaints regarding Prebill Ratio Report timeframes, Jason Haught and Jill Beaty recommended using the Benefit Change Extract Report, which displays prior and new benefit plan options and premiums for changed members and can be run at any time using defined start and end parameters. Jason Haught explained that pre-bill ratio reports require specific filtering or the use of the Benefit Change Extract Report, and offered to provide a direct walk-through. Jill Beaty warned that monthly billing reports disappear once the subsequent month is pulled, requiring prompt review.
- **Ratio Report Follow-Up, Transaction Dates, and Password Support:** Following up on ratio reports, Jason Haught offered direct assistance and walk-throughs to Bas that inquired. A BA representing a state agency, asked about transaction dates for qualifying events, and Jill Beaty clarified that users must input the exact date of the qualifying event or hire date. Jill Beaty shared an ACCESS workaround for employees who were hired previously without basic life coverage, noting that users must enter the employee's *original hire date* as the transaction date when adding basic life during a new qualifying event to prevent system errors. Finally, Jill Beaty instructed a BA to email them directly for manual password assistance due to persistent copy-paste errors.
- **Enrollment Form Submissions and Customer Service Response Times:** Cathy Hearnshaw and Jill Beaty instructed users to upload or attach enrollment forms through the Conversations feature rather than emailing them, unless dealing with an urgent situation, to help eligibility staff process enrollments faster. Trina Sweeney spoke on behalf of customer service, addressing member complaints about unreached calls and emails by assuring participants that staff are responding in order of receipt and prioritizing urgent matters despite the heavy volume. Jill Beaty reiterated that emailing forms is not secure and unproductive, directing users to use faxing or Conversations instead. Jill Beaty explained that conversations are located in the blue bar under participant accounts and noted that staff are addressing them in order of receipt

- **Large Agency Auditing and Virgin Pulse Reports:** Jason Haught responded to a BA with multiple large agencies regarding large agency auditing concerns, stating they are working with the programming team to develop faster identification methods. Jeannie inquired about Virgin Pulse monthly reports, and Jason Haught explained that non-state reports are still in configuration because they require vendor batch file separation and individual account posting, unlike state agencies which process through payroll. Jill Beaty announced that older OPEB reports remain accessible in the legacy "Manage My Benefits" system.
- **Billing Credit Discrepancies and Automated Enrollment Workflows:** BA raised a concern that downloaded PDF billing reports omit reallocation credits for employees, prompting Jason Haught to state they must consult developers for a fix. BA questioned why employee approval is no longer required for direct website enrollments, and Jason Haught explained that the new system is designed around automated payroll feeds to process eligibility efficiently, replacing old BAS manual workflows, though interface challenges during the transition have caused complications.
- **Backdating and Insurance Enrollment Timing:** Jill Beaty addressed questions regarding backdating insurance enrollments when an employee is hired in one month but signs up mid-next month. Cathy Hearnshaw explained that the system currently allows backdating due to processing backlogs, but future enrollments will go forward from the actual event date. Cathy Hearnshaw stated that if Benefit Administrators want coverage to move forward instead of backdating, they must submit a signed and dated written note or an updated form via fax.
- **Interface File Status and Benefit Administrator Virtual Support:** Jason Haught reported that interface files were temporarily stopped and would resume today, excluding new hires due to incorrect mapping, which requires new hires to be added via the add/change update tool. Jill Beaty offered to schedule 20-to-30-minute individual virtual calls with Benefit Administrators struggling to add employees, instructing BAs to send member names and information for a video chat to capture errors for programmers. Jill Beaty also asked participants experiencing password login errors with copied links to email them to her for assistance. Additionally, Jill Beaty instructed BA to send an urgent email to their eligibility representative regarding a member spouse with no coverage who urgently needs medication.
- **Early Warning Reports and Document Verification:** Jill Beaty directed BA to the instructions at the top of the Benefit Administrator page for pulling the EWR, now called the Prebill Ratio Report, noting that Kelly Davis or Jill Beaty can provide additional assistance. Addressing concerns about receiving notifications for missing documents like marriage certificates, birth certificates, or immigration papers, Cathy Hearnshaw explained that pending dependent documentation can be uploaded through My Life if it is required. Cathy Hearnshaw clarified that when a member uploads documents such as a marriage certificate, the document goes straight to PEIA for approval. Jill Beaty advised BA to reach out to Nicole regarding workflow status updates for retirees that fail to process in

ACCESS, and Jason Haught and Jill Beaty confirmed that retirees cannot retire themselves yet, leaving that action to Benefit Administrators for the time being. Jason Haught proposed a 15-minute ratio report session during the October banter to help navigate menu options.

- **Retiree Extended Coverage Bills and Part-Time to Full-Time Transitions:** BA raised concerns that state agency retirees with 100% leave conversion free extended coverage are receiving bills. Jason Haught asked BA to provide retiree ID numbers to investigate misconfigured affiliations. Regarding BA's question on transitioning an employee from part-time to full-time, Jill Beaty and Teresa Burdette discussed using original hire dates or new full-time eligibility dates to trigger qualifying events, with Jill Beaty agreeing to verify the exact process with programmers.
- **Higher Education Faculty Premiums and Insurance Card Replacements:** Jill Beaty addressed higher education payroll coordinators facing issues with adjusting premiums for 9-month faculty who pay in full in May, inviting participants to share emails in the chat to collaborate. Jill Beaty and Jason Haught explained that the new system does not support requesting replacement insurance cards, directing members to call carrier numbers listed in Summary Plan Description or print temporary paper cards via the UMR website linked from PEIA.
- **Payment Receipts and New Hire Enrollment Navigation:** Addressing BA's concern about backdated new hire effective dates, Jill Beaty reiterated that forms must be faxed with a note to move coverage forward. BA asked about printing payment receipts, and Jason Haught and Courtney Blankenship explained that while submission confirmations are not currently available, users can click on a processed payment link, scroll to the bottom, and view the CR document to confirm receipt of funds. Jill Beaty provided instructions on using enrollment history and clicking continue to finish unfinished new hire events, though one BA noted this method has not been successful for their organization.
- **Non-State Agency Retiree Medicare Conflicts:** BA raised an urgent issue regarding a non-state agency employee who retired on December 1st, 2025, but whose coverage was not terminated in PEIA, causing Medicare to deny medical bills due to active PEIA enrollment. Jason Haught and Cathy Hearnshaw instructed them to contact Cathy Hearnshaw directly after the meeting to review billing status and initiate the termination process.
- **Resigned State Hospital Employee COBRA and System Transfer Issues:** BA reported that a severely ill employee who resigned from a state hospital is showing as active through June 30th and cannot receive a COBRA packet from UMR, prompting Cathy Hearnshaw to ask them to reach out immediately to resolve this urgent matter. Jill Beaty addressed BA's issue regarding employee transfers showing already-in-the-system errors, instructing them to email the member's ID, name, and screenshots of the error to their eligibility representative.

- **Local Fund Participation Affidavits and Billing Reconciliation:** Non-state BAs sought clarification on local fund affidavits regarding the definition of benefit-eligible employees versus temporary employees working variable hours. Jason Haught clarified that temporary employees working variable hours are not eligible and recommended following plan eligibility rules, noting that Stacy Clutters is available to assist with specific affidavit questions ahead of the end-of-month deadline. BA reported billing reconciliation issues for July, and Jill Beaty advised contacting their premium account representative. BA inquired about Revive Health registration errors, and Jill Beaty explained that new hire eligibility files must be transmitted before employees can register.
- **Address Changes, Coverage Verification, and Quick Reference Guides:** Addressing BA's concerns about missing insurance cards due to address changes during blackout periods, Jill Beaty explained that members must verify their address on file with PEIA and print temporary cards via the UMR website. Trina Sweeney and Jill Beaty explained that the PEIA quick reference guide is a live document that expanded from 27 to approximately 60 slides to reflect real-time updates, making digital access preferable to static PDFs. Jason Haught reflected on the historical multi-year rollout timeline of online enrollment systems and how ACCESS is in the early growing stages.
- **State Aid, New Hire Email Notifications, and ACCESS Edits:** Regarding state aid on September billing, Jason Haught stated that the file was finalized yesterday and will be uploaded soon. Jason Haught and Trina Sweeney confirmed that automated emails for ACCESS enrollment are being sent to new hires, advising benefit administrators to check spam folders for delayed responses. Jill Beaty addressed questions regarding why Benefit Administrators cannot edit new hire coverages after initial creation, noting that while programmers are working on enhancements, Benefit Administrators can use the continue option during initial setup but cannot resume new hire events afterward. Agency requested August and September invoices, which Courtney Blankenship noted are located under the forms tab within the blue billing tab.
- **Canceling Terminations, Payroll Checks, and URL Whitelisting:** BA asked about canceling a termination for a rehired employee, and Jill Beaty explained that benefit administrators can reverse terminations and enrollments by navigating to enrollment history and clicking the reverse hyperlink. Jason Haught advised Benefit Administrators to check preliminary payrolls after September 22nd for the October 2nd payroll to verify new hire integration from ACCESS to OASIS. Jason A Haught confirmed that Oasis interface updates occur twice a week on Tuesdays and Fridays. BA suggested white-listing URLs to prevent firewall issues, and Jason Haught agreed to discuss implementing URL whitelisting with IT. Jill Beaty and Trina Sweeney clarified that retiring individuals in ACCESS does not require paper forms and noted that while Benefit Change Extract Reports are available in Logi reports, system notifications for member changes are not generated automatically. BA asked about the Benefit Change Extract Report, which Jill Beaty noted is available as an Logi report detailed in the newsletter.

- **Basic Life Retroactivity, Rehired Employees, and Forward-Dated Requests:** BA asked about the billing impact of using original hire dates for basic life events, and Teresa Burdette explained that coverage pushes forward to the first of the following month. BA confirmed that establishing Basic Life and a qualifying event requires two separate transactions. It was asked about rehired employees, and Jill Beaty confirmed they are treated as new hires eligible for benefits. Jason Haught and Jill Beaty discussed why Benefit Administrators request forward-dated coverages for mid-month paperwork submissions to avoid double-charging employees for partial months, agreeing to evaluate this transition issue offline.
- **Payment Receipts, Portal Modifications, and Effective Date Rules:** BA shared a best practice of taking screenshots of payment submissions as a receipt. BA reported a mistakenly deleted August invoice payment, which Courtney Blankenship and Jason Haught reviewed regarding same-day deletion behavior. It was asked whether members can modify new hire elections on the portal after initial submission, and Teresa Burdette and Jason Haught noted that incomplete transactions permit new entries. Jason A Haught and Teresa J Burdette discussed effective date rules, noting that eligibility traditionally begins the month after the hire date with a three-month window to enroll. BA sought assistance for a non-state employee removing a daughter from insurance, directed to Shawn McKenzie. BA's manual allocation issue and credible coverage letter availability were discussed by Courtney Blankenship, Teresa Burdette, and Jason Haught. Courtney Blankenship noted police and fire retiree invoices are available via My Life accounts, and Jason Haught addressed online registration processes for non-state agency new hires.
- **Effective Date Review, Divorce Decree Uploads and Prior Month Billing Dates:** Jill Beaty clarified that currently backdated enrollments default to the first of the month after the hire date, differing from the old system's event-date rule. BA asked about upload errors for divorce decrees in My Life, and Jill Beaty advised uploading them via conversations. BA asked about the payment date for prior month bills, and Jason Haught and Courtney Blankenship confirmed that the due date remains the 5th of the following month, with non-state accounts able to pay upon receiving billing notifications.
- **Interface File Updates and Manual Data Entry:** BA asked about ACCESS-to-OASIS interface issues for late August hires, and Jason Haught explained that interface files were temporarily placed on hold due to mapping errors but are expected to resume. Addressing a mapping issue concerning interface file to OASIS today, Jason Haught instructs participants to run their preliminary checks after the 22nd and manually input any missing data while the mapping problem is resolved. BA notes this manual check was undertaken to assist benefits personnel. Additionally, Jason Haught outlines the timeline for upcoming files prior to preliminaries, scheduling three files: one today, one on Monday, and a large file on Tuesday.
- **Spousal Surcharge Audit:** Highlighting a low response rate for the staffer audit, Jill Beaty announces that members with employees who have not responded

may receive a letter from Staci Clutters to help facilitate outreach. Jason Haught explains that this represents the final opportunity for respondents before a surcharge is applied, noting that at a 65% response rate, approximately 3,500 individuals have still not responded. Jill Beaty urges participants to notify these members promptly so they can avoid surcharges and subsequent complaints.

- **Retiree ACCESS and My Life Platform:** Addressing questions regarding account management, Jill Beaty confirms that retirees log in identically to active employees through their My ACCESS accounts to view and pay billing (unless they are on CPRB) and make changes. Jill Beaty encourages getting employees accustomed to the My Life platform while they are active employees so they are already familiar with managing their accounts and payments independently when they reach retirement.
- **Definition of Employee Transfers:** Clarifying rules regarding staff movement, Jill Beaty answers a question about transfers by stating that an employee who has not worked for a while and experienced any break in coverage is not considered a transfer, but is instead classified as a new hire.
- **Transition Period Workload and Closing:** Acknowledging widespread participant frustration with the current transition, Jason Haught apologizes for the heavy workload and difficulties caused, but asks everyone to have faith in the process, explaining that the end goal of setting up these interfaces is to reduce workload in the long run. The meeting concludes with Jill Beaty and Trina Sweeney thanking attendees and wishing everyone a good weekend.