

Summary

Training schedules and billing procedures discussed with account management updates.

Details

Open Enrollment Training and PEIA 101 Schedule: Jill Beaty outlines upcoming open enrollment training sessions scheduled to run from March 16th through March 26th, alongside PEIA 101 training sessions set for December 1, 2026 at the PEIA offices in Kanawha City, Charleston.

Meeting Introductions and Agency Representation: Jill Beaty convenes the meeting introducing Courtney Blankenship as the billing presenter, while identifying Lisa, Kathy, and Shawn as representatives from eligibility, and Frances as a Customer Solutions Team Lead.

Account Code Updates and Missing Inter-Agency Transfer Coupons: BA raises a problem regarding updating HRIM account codes and finding deduction amounts in Oasis or ACCESS. Jill Beaty directed him to the OASIS codes found with the ACCESS instructions on the BA page on the PEIA website. Another BA reports that an inter-agency transfer coupon is missing despite being allocated. Courtney Blankenship explains that a chart of accounts funding issue and retiree leave conversion separation caused deposit errors, requiring premium account representatives to run coupon reprints.

Billing Discrepancies and Contact Channel Guidance: BA reports an incorrect billing amount showing an erroneous charge of \$27. Jill Beaty directs non-state entities to Kelly Davis, boards of education to Vssha Vaghela, and colleges, universities, and state agencies to Michelle Trail. Courtney Blankenship advises participants experiencing long response delays to email premiumaccounts@wv.gov so any available team member can assist them.

System Progress, Form Updates, and Retirement ACCESS Instructions: Jill Beaty praises participants for reporting system errors to hold programmers accountable and reminds everyone to print newly updated forms displaying email addresses and salary designations instead of IDX codes. Jill Beaty explains that retirement instructions in ACCESS are live updated on the website and warns that retiring participants who switch directly to Humana will reset their deductibles and out-of-pocket maximums. Jill Beaty announces the next BA Banter session for November 17th at 1:00 p.m.

Billing Navigation and Reallocation Credits: Courtney Blankenship reviews the billing tab, explaining that parentheses on itemized invoices and adjustments indicate subtractions, while numbers without parentheses are added to invoice totals. Courtney Blankenship details that reallocation credits automatically transfer funds from terminated or plan-changed coverages to older invoices or active accounts and clarifies that eligibility adjustments made after monthly billing is pulled will not reflect until the following month.

Resolving Unapplied Payments and Zero-Balance Invoices: Two Non-State BAs raise concerns regarding duplicate payment displays and zero-balance invoicing issues caused by unsubmitted or unallocated coupons. Courtney Blankenship performs a live account review for the BA representing Nicholas Community Action, identifying a partially allocated payment, updating the totals, and resolving the net due amount. Courtney Blankenship invites participants to email premium accounts directly with their agency names to address similar backlogs.

Manual Allocation Steps and Lockbox Coupon Management: BA asked whether participants can select specific lines to pay each month to ensure correct allocations. Courtney Blankenship demonstrated manual allocation features, instructing users to search employees, click the kebab menu (Three dots) to update totals until the remaining amount reaches zero, and save. Courtney Blankenship explains that lockbox payments require full allocation to generate forms, and unprinted coupons sent to the treasurer's office require PEIA staff to delete the original coupon to correct net due balances. Furthermore, state agencies should wait until the final payroll run is confirmed before finalizing billing.

Troubleshooting Statement Balances and Missing Coupons: A college BA reported that their statement balance is higher than expected and an inter-agency transfer coupon failed to generate after attempting payment on October 15th. Courtney Blankenship explains that if a coupon is 100% allocated but missing, PEIA staff must execute a reprint so participants can obtain the correct number to enter into the accounting system.

Coupon Generation and Payment Allocation: The same college BA inquired about viewing and reprinting payment coupons, noting that they only saw an outdated September coupon. Courtney Blankenship explained that after adding a new payment and allocating it, the system sends coupons directly to the forms section, but premium accounts representatives must perform reprints if a coupon fails to generate. Courtney Blankenship recommended including the five-digit payment ID and specifying whether the agency is PEIA or RHBT when emailing premium accounts to expedite assistance.

Monthly Statement Reconciliation and Payroll Deductions: BA raised concerns about fluctuating monthly statement amounts that initially appeared very high before employee deductions were applied, resulting in a PEIA credit and a small RHBT

balance due. Courtney Blankenship and Jill Beaty clarified that statements fluctuate due to the timing of payroll processing and advised that participants should not rely on the initial statement balance. Instead, Courtney Blankenship instructed agencies to look only at invoice amounts and adjustments, reducing payments by the amount of the payroll after the last payroll run of the month.

Terminated Employees Billing Errors: Non-state BA reported that their PEIA invoices were significantly inaccurate due to terminated employees continuing to appear on bills and duplicate \$1.98 charges and credits. Jill Beaty and Courtney Blankenship advised the BA to email PEIA premium accounts with a list of members containing first and last names and ID numbers, and to copy Shawn R McKenzie on the communication. Jill Beaty offered to schedule a separate meeting to walk through the proper termination process.

Board of Education Beginning Balances and Credits A Board of Education BA inquired about beginning balances duplicating monthly and carrying over credit balances from July. Courtney Blankenship explained that Board of Ed credits and state aid interact such that state aid covers short billing periods, leaving a credit balance. Courtney Blankenship noted that these balances will likely be depleted around December or January when state aid reduces, and unallocated payments must simply carry over month-to-month until utilized.

Pre-Billing Timing and Payroll Schedules: Jill Beaty and Courtney Blankenship discussed the timing for pulling pre-bills relative to the last payroll run of the month. After a BA clarified that October 30th is a third payroll where benefits do not come out and the actual last payroll date is the 16th, Courtney Blankenship agreed to run pre-bills on Thursday, 10/22/2026 to give agencies adequate review time. Courtney Blankenship also noted that running pre-bills in the correct time frame allows agencies to effectively filter reports to view specific billing changes.

Overpayments and Credit Balances: BA asked how to handle a payment that needed to exceed the net due amount and whether credits like RHBT required manual intervention. Courtney Blankenship stated that attempting to generate a coupon for an over-allocated amount is problematic and advised simply sending a check for the net due or letting automated processes apply credits. Courtney Blankenship explained that negative balances represent existing credits that automatically apply to future monthly invoicing, eliminating the need to make payments or manual transactions while a negative balance persists.

Accessing Online Instructions and Deduction Codes: Jill Beaty directed participants to the PEIA website at peia.wv.gov under partners and the [Benefit Administrators page](#) to find quick ACCESS guides, training materials, and payment instructions. Courtney Blankenship highlighted the I247 deduction codes spreadsheet for Oasis and state

agencies, explaining that Jason showed them how the sheet is pre-filtered for spousal surcharges and can be cleared to view all options.

Automated Clearinghouse Payment Issues and Processing: NS BA asked about restrictions or time frames that might block electronic payments after experiencing issues paying through Automated Clearinghouse. Courtney Blankenship checked the Raleigh County Memorial Airport account and confirmed there are no time frame restrictions preventing payments. NS BA shared troubleshooting advice, suggesting zooming out the web browser to view the payment button or retrying after a brief delay, while Courtney Blankenship noted a past September 9, 2026 file processing delay caused by staff vacation and file merging.

New Hire Communication and Institutional Email Issues: Jill Beaty announced the next meeting for November 17 at 1:00 PM and addressed concerns about new hires not receiving emails, noting that Telus reported no issues and requested specific examples.