

External Release Notes



Luna Release

Version 1.0 June 13, 2019

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What's New?

Behind the scenes, our team works hard to bring our clients a better benefits experience. This means delivering the best technology to meet our clients' human resources and benefits administration needs. Here are the new features and functionalities we're rolling out in the Luna release.

New Features

Updated Guardian Evidence of Insurability (EOI) Status API Calls (156449, 156487, 156573, 156577, 156575, 158663)

The Guardian EOI integration was updated to use the new v2 status API call. The v2 status API call includes the following:

- Saving subscriber's transaction key for their applicable coverages to ensure subscribers can check their EOI status until the final decision is made
- Logging subscriber's EOI status-related information
- Auto-updating subscriber's EOI approve or decline status on coverages
- Pulling the endpoint and certificate from external user credentials to maintain connectivity with Guardian
- Creating new job request and API request for Guardian EOI to check statuses so they are updated in a timely manner

Removed Guardian Evidence of Insurability (EOI) Link (159085)

The Guardian EOI link was removed from the Employee Audit page.

Introducing the Prudential Evidence of Insurability (EOI) Integration (151315, 153403, 153405, 152569, 152597, 152601, 152607, 152613, 152619)

The Prudential EOI integration was added to the list of available plugins in the HR Experience. The integration maps the subscriber and spouse's (if applicable) demographic and plan election data so it is correctly sent to Prudential via SOAP XML. The data and class mapping ensure the subscriber and spouse's enrolled plan year, plan, and coverage type are sent to Prudential based on the values stored in the Data Mapping section of the Prudential EOI plugin. This is used to create the EOI questionnaire in Prudential's system.

When the subscriber confirms their enrollment, a pop-up box will display with all the Prudential benefits requiring EOI. When the subscriber clicks the "Review EOI" button in the pop-up, this triggers their information to be sent to Prudential and will single sign-on (SSO) the subscriber to Prudential so they can complete their pending EOI Questionnaire.

Note: for the SSO to work for the subscriber, the "Enable Enrollment SSO" option must be checked in the General tab of the Prudential EOI plugin.

The screenshot shows a configuration window titled "PlanSource Connect: Prudential EOI". It has two tabs: "General" and "Field Mapping". The "Field Mapping" tab is active. The configuration includes:

- Enable Enrollment SSO:** A checkbox that is checked.
- Contract Number:** An empty text input field.
- Test Only:** A checkbox that is unchecked, with the text "(Not to be used for active enrollment)" next to it.

At the bottom of the window, there are two buttons: "Cancel" and "Save".

Removed Username Field from BambooHR Data Mapping (154825)

The username field was removed from the BambooHR Plugin on the "Data Mapping" page.

Updated Payroll Deduction Endpoint for Deduction Changes (156201)

The payroll deduction endpoints for the Admin API were updated, allowing users to receive a list of field changes for active payroll deductions. For more information, please review the Developer Portal [here](#).

Updated Payroll Deduction Endpoint to Show Current Deductions (150037)

The payroll deduction endpoints for the Admin API were updated, allowing users to filter for only current and previous payroll deductions. For more information, please review the Developer Portal [here](#).

Added New API Users Page to HR Experience (152931, 152887, 152889, 152909)

A new page is now available within the HR Experience for administrators to create API users. Within the left-hand menu on the "System" page, a new option labelled "API Users" allows administrators to create up to three API users. These API users can give various levels of configurable data access to employees and coverage data for the client. For more information, please review the Developer Portal [here](#).

Updated Document Request Process (145829)

The Document Request process was updated to run a job to terminate dependents whose document request have expired. After the job is run, the system evaluates which dependents are left on the subscriber's plan and the enrollment type to determine the new coverage level cost calculation to ensure the correct cost and coverage level is applied.

Pending Coverages when Evidence of Insurability (EOI) and Document Request are Required (154769)

When subscribers enroll in coverages that require EOI and a Document Request, their new coverages now pend until both the EOI is processed and the Document Request is approved. This ensures the subscriber doesn't have an inaccurate coverage level and premium cost due to different stages of processing the coverage.

Updated Carrier Billing Remittance Statement (149731, 160539, 140069, 150411, 158099, 149879)

The Carrier Billing Remittance Statement was updated to include the following:

- Added the current month's Premium Balance Due at the top of the statement, making it easier to find. This amount reflects the summary section, which includes the population.
- Added new column, "Total Insured Lives", that shows the sum of both insured employees and active enrolled dependents.
- The "Rate" column was renamed "Rate Basis" and now ensure all rate basis decimals follow the format entered in the "Carrier Billing - Plan Billing Parameters" rate instead of defaulting to four decimals. If there is an override, however, it will use the override rate.
- Introduced a new file naming convention for PDF and Excel exports. The new naming convention is the client's name, carrier name, then billing period in MMDDYYYY format. This also applies to billing email attachments.

Updated Text Message Method for Multi-Factor Authentication (MFA) (153591, 153917)

The Text Message verification method for MFA was updated, enabling users to give consent to receive text messages. If users chose to opt out of receiving text messages, they will be alerted upon login they've opted out of text communications and informed how to opt back in.

Removed Ability to SAML Single Sign-On (SSO) with Old Gem (148329)

For users who access the system via SSO, they will no longer be able to successfully SAML SSO to the system unless they've updated their code to the latest Gem. Previously, if clients didn't update to the new Gem, they would still be able to access the system. With this release, the ability to still SAML SSO without updating to the new Gem will no longer work.

For more information regarding this change, please contact your Account Manager for assistance.

New Guided Workflow for Volume-Based Plans in Self-Service Renewal (145939)

The workflow for adding a new Volume-Based Plan in Self-Service Renewal was improved to make the configuration process easier for users. When users add a new Volume-Based Plan, the "Volume Configuration" step now automatically takes users through a guided Plan Volume Configuration workflow. If the user is editing a Volume-Based Plan, they will not automatically be prompted to use the new workflow, but instead will see a new link labeled "Guided Configuration" which will toggle the new guided Plan Volume Configuration workflow.

The new workflow starts by asking the user to identify the appropriate description of how the volume is determined and how their subscribers enroll in the volume. Based on the description chosen, the user is then guided through the correct configuration path to successfully configure the Volume-Based Plan by answering a series of tailored yes or no questions. When appropriate, the user will be prompted to input increments, set minimum and maximum increments and caps, configure volume rounding, and more. Each time the user provides an answer, any of the information they input is saved to that point.

If the user decides to change an answer after answering the additional questions after it, a pop-up box will appear warning the user this will clear their responses after that point. Additionally, while in this workflow, users have the option to exit the guided workflow by clicking the "Advanced Configuration" link at the top of the page. Choosing this will allow the user to bypass the guided workflow and configure the Volume-Based Plan on the current format if they don't want guided assistance. When choosing this option, a popup message will appear warning them any progress made on the page will be cleared with the option to cancel or proceed.

Note: for first-time users of Self-Service Renewal, it's recommended to use the Guided Configuration option for adding Volume-Based Plans. Long-Term Disability and Short-Term Disability Benefit types are not currently supported by the Guided Configuration workflow; users will default to the Advanced Configuration workflow instead.

Voluntary Employee Life: Volume Configuration

[Advanced Configuration](#)

Select the statement that best describes the format in which volume is determined and offered to the subscriber for enrollment.

- All eligible subscribers are offered the same fixed volume amount.
- Subscribers are offered the ability to determine the volume they wish to elect in sequentially increasing amounts of a fixed increment volume (ie 5000,10000, 15000).
- Subscribers are offered a single electable volume which is determined by applying a multiplier to a designated salary amount.
- Subscribers are offered the ability to elect increments of coverage where the increment volume is determined by referencing a designated salary amount.
- Subscribers are offered a single electable volume that has been calculated by referencing the volume of separate benefit in which the subscriber is also enrolled.
- Subscribers are offered the ability to elect increments of coverage from a list of custom increment volumes.
- Subscribers are not offered a specified volume when electing the coverage.

NOTE: Please answer all questions until you're finished.

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HR Experience Refresh Updates

Employee Profile Page Updates (147355, 150963, 152225, 154387, 154239, 154399, 154409, 154433, 154435, 154557)

As part of the HR Experience refresh, the Employee Profile page was updated to include the following features:

- Updated Employee Search to allow users to search by first and last name, making it easier to find employees.
- Added Employee's salary details to the Employment tab.
- Added open tasks for the employee with a direct link to the "Tasks" page for quicker processing.
- Updated the "Benefits and Family" section of the profile to include the dependent coverage details, beneficiary details, an indication of whether employee coverages are pending or not, employee volume and annual contribution amounts, and employer contribution details.

Edit Dependent Page Updates (150057, 152381)

The Edit Dependent page was updated to include QMSCO and Medicare options and dates regarding the dependent's enrolled coverage(s).

Work Status Event (WSE) Processing Page Updates (150389, 150621, 153987)

The WSE Processing page now offers administrators more field display options (found in the gear icon), the ability to sort information, and a direct link to the WSE Configuration page for easier access.

Dashboard Updates (151853, 152665, 152845, 154729, 154733, 154753, 154755, 154947, 155233, 155913)

As part of the HR Experience Refresh, the following updates were made to the Dashboard:

- Added ability to pin the navigation menu open or closed.
- Added Your Tasks section that dynamically displays the number of each pending task.
- Added Learning and Development section.
- Added Links section that contains important pages not easily accessible, which includes ACA Dashboard, Advanced Configuration, Benefit Document Library, Documents, EDI Dashboard, Implementation Dashboard, Messages, and Page Content.
- Removed Data and Tools and System Administration sections from dashboard.
- Added Self-Service Renewal section that indicates the client's current progress in their renewal. If the client does not have Self-Service Renewal, this section will display the Renewal Wizard instead and their current progress.
- Added Benefits Enrollment section that shows New Hire and Open Enrollment details
- Added Employee Statistics section that provides details regarding employee and coverage changes
- Added ACA Statistics section that provides details regarding Full-Time/Part-Time employees and those gaining or losing coverage.

Audit Page Updates (149321)

The Employee Audit page was updated to match the new HR Experience.

- Users can now hide empty fields, making it easier to view the history details.
- Added "Recent Changes" option, allowing the user to highlight changes made in the last 60 days when checked or 12 months when unchecked.
- Improved Change history to show only changed fields and what those changes are, making research faster and easier.

Document Request Updates (151621, 146745)

The Document Request page was updated to display the employee's response regarding a document request, for example, displaying the employee's reason for not providing a document. Additionally, administrators can now also approve or deny a document request with multiple benefits. For this feature to work, the "combine requests" option must be checked.

Tasks Page Updates (152447)

The Tasks page was updated to include a context field option. This allows the user to see what enrollment a document request occurred in, such as Open Enrollment, New Hire or Life Event.

Life Event Page Updates (157573)

The Life Event page was updated to show the status of document requests as well as the ability to approve or decline and reissue a document request within the life event, improving the flow and processing time.

Enhanced Enrollment Flow Updates

Introducing the Enhanced Enrollment Flow (139563)

The Enhanced Enrollment Flow simplifies the Employee Experience in 3.0 by clearly identifying the actions employees need to take, making it easier for employees to interact with and enroll in their benefits. When employees log into their enrollment, it is now grouped into the following sections: Election Required, Confirmation Required, and Plans to Review.

The Election Required section is where employees will select benefits requiring an election in benefits they are currently not enrolled in. The Confirmation Required section is where employees will confirm benefits they've already elected or have defaulted into. The Plans to Review section is where employees can review passive benefits they are enrolled in.

Once a section is complete, a green check will appear at the top of the section. When the Election Required and Confirmation Required sections are completed, employees can then review and checkout with their benefits.

For information on how benefits are configured to appear in each section within the Enhanced Enrollment Experience, see release notes 142305, 142303, and 142319.

Configuring Open Enrollment Actions for Benefits (142305)

On the Define Benefits page in the HR Experience, the "Open Active Enroll" checkbox is now labelled "Open Enrollment Action Type" with a drop-down menu with two options: active and passive. The enrollment type chosen for each benefit determines which section of the Enhanced Enrollment Flow it will be grouped into (Election Required, Confirmation Required, or Plans to Review, ***see release note 139563 for more information***).

Configuring New Hire Enrollment Actions for Benefits (142303)

On the Define Benefits page in the HR Experience, the "New Hire Active Enroll" checkbox is now labelled "New Hire Enrollment Action Type" with a default enrollment type of "Active" that cannot be changed. This means new hire enrollment automatically defaults all benefits to active. For any benefits that have an active election, for example default enrolled benefits, will appear in the Plans to Confirm section of enrollment. Any benefits that do not have an active election will appear in the Election Required section of enrollment.

Added Enhanced Enrollment Flow Benefit Configurations to Self-Service Renewal (157159)

The new benefit configurations introduced for the Enhanced Enrollment Flow, Open Enrollment and New Hire Enrollment Action Type, were added to the Self-Service Renewal workflow. When users edit or add a new benefit in Self-Service Renewal, they will be prompted to configure the Open Enrollment and New Hire Enrollment Action Types for the benefit.

Updated Benefit Display Order (142319)

On the Define Benefits page in the HR Experience, the "Display Order" field now reflects the benefit's display order according to its enrollment type. This means if a benefit has an "Active" enrollment type and a display order of 2, it will display second within the Election Required section of the Enhanced Enrollment Flow.

Updated Locked Benefits (148503)

In the Enhanced Enrollment Flow, subscribers cannot change the volume or coverage level for a locked benefit after their initial enrollment window closes. After enrolling in a locked benefit, such as during new hire enrollment, subscribers will only have the option to confirm or decline the locked benefit after the initial enrollment.

Action Required Section on Confirmation Page for Evidence of Insurability (EOI) Benefits (153169, 159719)

When subscribers elect a plan that requires EOI, the confirmation page now shows the EOI benefits at the top of the page within a "Required Action" section. This ensures the subscriber is aware of additional action required to complete their enrollment in the benefits. Depending on whether the plan requiring EOI is an integration or not, subscribers will either be prompted to single sign-on (SSO) to the carrier's website to complete the EOI or given instructions on how to complete their EOI in another format.

Updated Plan Election Button (150885)

When selecting a plan in the Enhanced Enrollment Flow, the plan election button on the plan details page now says "Update Cart" unless the coverage level for the plan is set to "I agree" or "I understand". In those instances, the button on the plan details page says "I agree" or "I understand".

Updated Shopping Cart (144167)

As subscribers complete their enrollment and add benefits to their shopping cart, their benefits now mirror the enrollment type section on the Benefit Dashboard. For example, when a benefit corresponds with the "Plans to Confirm" section of the Benefit Dashboard, it will appear in the "Plans to Confirm" section in the shopping cart. However, once the subscriber selects "Review and Checkout", the enrollment type sections will be removed and simply show all the elected benefits.

Added Title and Subtitle to Benefit Enrollment Page in Page Content Editor (144153)

The Benefit Enrollment page in the Page Content Editor was updated to include the new sections introduced in the Enhanced Enrollment Flow. The page content includes the three sections for each enrollment type - Active, Confirmation, and Passive - and an editable Title and Subtitle within each section.

Employee Experience 3.0 Updates

Employee Experience 3.0 Migration Notification (157179)

To prepare clients to migrate to the current Employee Experience, a notification appears when logging into the HR Experience informing users they need to migrate. This notification will only appear if the client hasn't migrated to Employee Experience 3.0 yet.

Updated Life Events to Allow Selections in Upcoming Plan Year (146453, 151905)

When subscribers have a life event with an effective date in the previous or current plan year in which Open Enrollment for the upcoming plan year has closed, 3.0 was updated to alert the user of additional changes required for the upcoming plan year based on the life event's effective date. When subscribers complete their life event, the confirmation page will alert the user that their changes are only applied through the current year and they will be asked to take additional steps to apply the life event changes to the following plan year, if applicable.

Updated Beneficiary Statement in 3.0 (159791, 158201, 158203, 158205)

The Beneficiary Statement in 3.0 was updated to include additional details, including page numbers, the subscriber's name, and a static footer at the bottom of the page for each page of the Beneficiary Statement. This ensures the subscriber knows the order of the statement once printed and that the required language is displayed at the bottom for the subscriber.

When selecting the print option, users will also see a pop-up window warning them to download then print the statement to ensure all the page details above are included. If users do not download the Beneficiary Statement before printing, the page details will not appear on the printed statement.

Added Option for Automatic Confirmation Statement Emails in 3.0 (150901)

Administrators can now configure automatic confirmation statement emails for subscribers. When this option is configured in the HR Experience, subscribers with a valid email will automatically receive an email with their confirmation statement upon completing their enrollment.

Updated Confirmation Statement to Hide QMSCO Column (157253)

The QMSCO column on the printed/downloaded Confirmation Statement in 3.0 is now hidden from subscribers, unless the column is configured to be visible for the subscriber.

Affordable Care Act (ACA) Updates

Self-Insured Minimum Essential Coverage (MEC) Enrollees Import Changes (146855)

Name Suffix is now available as an editable field when manually creating or editing a Self-Insured MEC Enrollee import. These updates apply to both the New and Update worksheets.

Self-Insured Minimum Essential Coverage (MEC) Enrollee Editor (146859)

Name Suffix is now available as an editable field when manually creating or editing a Self-Insured MEC Enrollee record.

ACA Measurement Page Changes (150007)

To more clearly indicate the information that is available on the ACA Measurement page, the name of this page was changed to "ACA Employee Data". Within this page, the section "ACA Look Back Periods" was renamed to "ACA Measurement" to more clearly reflect what is available within this section, as both monthly and look back measurement details are shown within this section.

Enrollee List and Editor Changes (155285)

On the ACA Timeline page, the Self-Insured Minimum Essential Coverage (MEC) Enrollee table was renamed "Enrollees (1095-C Part III Covered Individuals)" so it is clearer that it is utilized for Part III of the 1095 form. In-line help text is available to clarify that enrollment in self-insured MEC and Health Reimbursement Accounts (HRA) plans are included in this table for populating Part III of the 1095 form. The table also has two new read-only columns for Benefit Type and the Plan. Additionally, this table is now also available on the ACA Employee Data page.

Updated Name of Self-Insured Enrollee Import (155365)

The ACA Self-Insured Enrollee Import worksheet within the Data Import page has been renamed "ACA Enrollee Import", more clearly indicating the data that is provided in the worksheet.

Updates to ACA Backend Process Section (146891)

On the ACA Employee Data and ACA Timeline pages, the ACA Backend Process section that contained the process for running the engine at the individual subscriber level has been updated. This section is now called "ACA Process Submission" and contains a drop-down to select the action to be taken. Once an item is selected from the drop-down, the applicable parameters will be displayed below.

What's Fixed?

To improve our clients' experience, our team continuously identifies and fixes bugs to keep the system running smoothly. The following bug fixes are part of the Luna release.

External Bug Fixes

Fixed Beneficiary Required on Ineligible Plan (155901)

Issue In Employee Experience 3.0, when subscribers were no longer eligible for a plan that required a beneficiary, they were still required to enter a beneficiary and were unable to checkout until doing so. If the subscriber already had a beneficiary saved in the Beneficiary Section, it would not appear when adding a beneficiary to the plan and was also allowing the beneficiary to have a designation of more than 100%.

Resolution The Employee Experience was updated to filter out plans when the subscriber is ineligible.

Fixed Annual Premium Not Appearing in Estimate Details (155061)

Issue When clients were using the Plan Recommendation feature in Employee Experience 3.0, the Annual Premium for a plan would not display within the Estimate Details.

Resolution Identified a previous change to the API was causing the Annual Premium not to display. The API was updated to ensure it appears for subscribers.

Fixed Disabled Administrators Receiving Reset Passwords (146781)

Issue When updating the Single Sign-On (SSO) settings from SSO Only to SSO Direct, the system would reset and email passwords to disabled administrators who should not have access to the system.

Resolution The code was updated, preventing passwords from being reset for disabled administrators when the SSO settings are changed. Only valid administrators will have their passwords reset and emailed.

Fixed Single Sign-On (SSO) Only Allowing Administrators to Login without Accepting End-User License Agreement (EULA) (154587)

Issue When clients had SSO Only configured, administrators logging into the system for the first time were able to skip accepting EULA.

Resolution The code was updated, ensuring the system checks for EULA when administrators login the first time.

Fixed Single Sign-On (SSO) Allowing Terminated Subscribers to Login (135933)

Issue Terminated subscribers were still able to SSO into the system.

Resolution The code for SSO was updated to check the subscriber's status before allowing them to login. If status is terminated, subscribers are unable to SSO into the system.

Fixed Beneficiary Statement Not Displaying Primary Plan Year in Footer (153815)

Issue	On the combined Beneficiary Statement in 3.0, the footer was not displaying the page content from the primary plan year on either the printed or downloaded statement.
Resolution	The logic was updated to display the correct information in the footer for the Beneficiary Statement for both the print and download options.

Fixed BambooHR Sync Discrepancy (154691)

Issue	There was a mapping discrepancy with BambooHR that allowed employees to be sync'd and imported into the system even if they were not set to sync. This occurred only when an employee was set to sync at one point and then set to not sync later.
Resolution	Updated code to ensure employees will only be imported via BambooHR when the option is checked.

Fixed Canadian Postal Code not Populating in Beneficiary Form for Dependents (157247)

Issue	When subscribers selected a beneficiary from a dependent already on file and their address is in Canada, the zip/postal code would not be pulled into the beneficiary form like the rest of the dependent's address.
Resolution	Identified the beneficiary form rejects zip/postal codes that contain letters. This would prevent Canadian zip/postal codes from being pulled into the form since they contain both letters and numbers. The form was updated to remove this restriction so the zip/postal code can populate properly.

Fixed Voya Evidence of Insurability (EOI) Not Working for Life Events (145591)

Issue	The Voya EOI plugin was not working for benefits elected during a life event. Instead of allowing users to Single Sign-On (SSO) to complete their EOI with Voya, they would receive an error message.
Resolution	Identified the coverage details were being omitted from the SAML response for all life events, causing the error and preventing the EOI from generating for the user. The code was updated, ensuring the Voya EOI plugin works for all enrollment scenarios.

Fixed BambooHR Import History Showing Incorrect Counts (154793)

Issue	When the BambooHR batch import sync occurred, certain failures and errors during the sync were causing incorrect counts in the import history for declared, successes, and failures.
Resolution	The batch import was updated to ensure the correct counts display in the import history.