External Release Notes

Polaris Release

Version 1.0 September 12, 2019

Contents

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 Polaris release.

Features

Introducing the Enrollment Dashboard To-Do List (166961, 166965, 166963, 169593, 171833)

The Enrollment Dashboard was updated to include a "To-Do List" for subscribers. Each task in the list includes a checkbox and the title of the task, where the title is also a link to complete the task. When subscribers complete a task on the To-Do List, the task will be checked off the list automatically, have a strike-through, and the link to access the task will be disabled

The To-Do List on the Enrollment Dashboard is tied to the required tasks displayed within the subscriber's enrollment. These are generated during enrollment based on the subscriber's elections. For example, if the subscriber elected coverage that requires Evidence of Insurability, this would generate a task for the subscriber to complete once they've finished their enrollment.
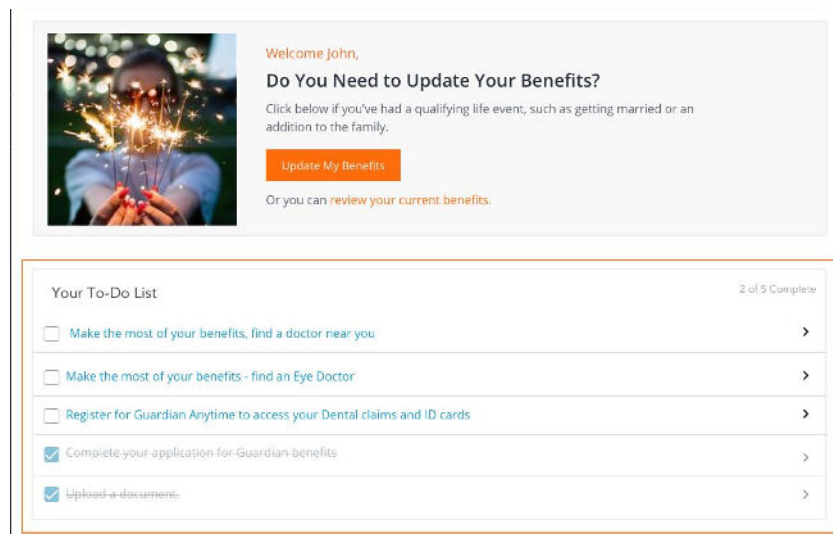
Updated ALEX Banner To Display On All Integrated Benefits during Enrollment (162397)

Subscribers using Jellyvision can access ALEX and receive plan information for the benefit regardless of whether there are multiple benefit options or just one. If there are multiple benefit options, the ALEX banner will appear on the Plan Selection. If there is only one benefit, the ALEX banner will appear on the Plan Details page.

Updated the "My Profile" Page in the Employee Experience (164171 & 164179)

The "My Profile" page in the Employee Experience was updated to provide a more user-friendly experience. This includes moving the "Edit" link to the top of the page, making it easier for employees to edit their information.

Moved Edit Dependent Link on "My Family" Page in the Employee Experience (168475)

On the "My Family" page in the Employee Experience, the "Edit Dependent" link is now at the top of the page. When clicked, the link displays fields to edit for the dependent, with options to cancel or save the changes.

Updated Enrollment Summary Verbiage in Employee Experience 3.0 (170723)

In the Employee Experience, the Enrollment Summary was updated to indicate the plan year start and end dates instead of the coverage effective start and end dates.

Updated Saving Beneficiaries within Session in Employee Experience 3.0 (161869)

When manually entering a beneficiary in Employee Experience 3.0, the beneficiary's information will now be saved within the session and displayed in the beneficiaries drop-down for any other benefits requiring beneficiary designation.

HR Experience Refresh Updates (153715, 167257, 155239, 159913, 163861, 164493, 153989, 157251, 158851, 167555, 167607, 160147, 163293, 170905, 156139, 158537, 159205, 163863, 167293, 169569, 165763, 152971, 129469)

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

1. **Dashboard and Navigation**
   - Users can no longer see links on the Dashboard or Navigation for pages they do not have the appropriate access to view. For example, if a user does not have access to the Affordable Care Act (ACA) pages, they will not see any ACA links in the system.
   - Additional links are available on the ACA card, providing direct access from the dashboard to commonly used ACA pages.
   - Updated the Tasks card so numbers over two digits do not wrap around to another line of text.
   - Updated the Recently Viewed Employees card to display the employee status.
   - Updated Employment Statistics card to include a link to Benefits by Election Report.
   - Added "Delete" option to the Renewal card, allowing users to delete a renewal blueprint so they can create a new one.
   - Added "Enrollment Passwords" option to the Actions menu of the Renewal card, allowing users to reset passwords.

2. **Employee Profile**
   - Users can no longer see links on the Employee Profile for pages they do not have the appropriate access to view.
   - Added new fields to the Basic Information tab for Termination Date, Social Insurance Number (SIN), and Coverage Start Date.
   - A link to "Notification History" is now available in the Actions menu within the History section.
   - A "Reinstate" option was added to the Edit Coverage pages when a coverage is eligible to be reinstated.
   - A "Verification Expiration Date" field was added to the Edit Dependent page when the "Verified" box is checked.
   - Added "Anthem Member Code" field to the Edit Dependent page, allowing users to view and edit the code.
   - When clients have carrier date rules, an effective date pop-up displays for the user to enter the new date when they made changes.
   - Within the History section, selecting a life event opens a card with the life event details, including the Event Date, Effective Date, Plan Year, Status, and Employee Notes. Clicking the "X" in the upper left-hand corner closes the life event card and brings the user back to the Employee Profile.

3. **Employee Search**
   - Updated search results to display the employee status by default and the termination date next to the status (if applicable).
   - Removed the scroll bar.
   - Updated text at the top to say "(Number) Results Matching (Search Term)".
   - Updated search to take users directly to the employee profile when there is only one result for the input employee.

4. **Work Status and Life Events**
   - A search feature is now available on the Work Status Events page. Clicking the magnifying glass icon on the page will open a search bar where users can search for employees by First Name, Last Name, SSN, SIN, or subscriber ID.
   - Made termination date an editable field on the Life Events page when approving life event.

Introducing SMS Texting to the Communications Tool

Communications now includes a texting capability, allowing administrators to send text message campaigns to employees in addition to emails. To create a text message campaign, choose the population, create a campaign, and send. Employees must have a valid cell phone number in the system and opt-in to receive texting communications. ***Note: The SMS texting feature is currently offered to beta clients only with the Polaris release.***

Added SMS Terms of Service to Communications Dashboard (168059)

A link to the SMS Terms of Service was added to the Communications Dashboard for clients who have SMS enabled. Clicking the link will display the legal terms and conditions for using the feature.

Added Click to Chat Option to the New HR Experience (170527 & 170695)

The "Click to Chat" function was added to the HR Experience. When GuideMe is enabled, it will appear as a button within GuideMe. When GuideMe is not enabled, it will appear at the top of the page as a chat bubble where the question mark icon resides.

Updated Renewal Card on HR Experience Dashboard (160639)

The Renewal card on the HR Experience dashboard was updated to display when the client's new renewal starts when in-between renewals. The information displayed in the Renewal card is based on when the client's current plan year ends.

Updated Document Request Trigger (169495)

Users now have the option to configure a document request trigger based on dependent populations, allowing the system to detect if dependents are already verified before requesting a document.

Updated Renewal Support Team Required Task in Self-Service Renewal (171391)

The Renewal Support Team Required task is now a mandatory task on the Self-Service Renewal Dashboard, regardless if the client requested changes that require assistance from Renewal Support.

Salary Update Reminder on Self-Service Renewal Completion Page (171367)

On the Self-Service Renewal Completion page, additional instructions were added to remind users to import salary updates to help prevent enrollment issues.

Updated BULK Payroll Deduction Endpoint for Deduction Changes (169821)

The BULK payroll deduction endpoint for the Admin API was updated, allowing users to receive a list of field changes for payroll deductions. For more information, please review the Developer Portal.

Updated Payroll Endpoint Deductions for Subscriber Flexible Savings Accounts (FSA) Amount (170943)

The payroll deduction endpoints for the Admin API were updated, allowing users to receive the subscriber FSA amount field. This field contains the goal amount for the employee and also the goal amount based on FSA and Health Savings Account (HSA) plans. For more information, please review the Developer Portal.

Added Affordable Care Act (ACA) Links to HR Experience Navigation (160975)

Additional ACA links were added to the navigation in the new HR Experience. Within the "Data & Tools" section of the navigation, you can now find the following links: ACA Form Management, ACA Corrections, and ACA Medical Offers.

Updated Affordable Care Act (ACA) 1095 Production File Naming Convention (157885)

When producing 1095 PDFs via the Form Management page, the file naming convention was updated to "Clientname_ClientID_1095X_PageCount_yyyymmdd". The letter that appears after "1095X" will be populated with an R if the form was generated from the Review tab, P if generated from the Produce tab, or C if generated from the Correct tab. The total number of pages within the PDF is the PageCount and the date the file was generated is the yyyymmdd.

Updated Gender Values in Dependent Worksheets (169841 & 169857)

The New Dependent and Dependent Update worksheets were updated, allowing users to import the gender values "U" and "X" for dependents when the other gender options feature is enabled. ***Note: The values are case sensitive and should be uppercase to properly import into the system.***

Added User-Defined Subscriber Fields to Coverage Import Worksheet (167543)

Additional user-defined fields were added to the subscriber section of Coverage Import worksheets, allowing clients to import up to 30 user-defined subscriber fields.

Updated Coverage Update Import (167585)

The Coverage Update Import was updated to allow additional employee and dependent coverage termination reasons to be imported into the system.

Updates to the Extended Billing Report (155569 & 151833)

The Extended Billing Report was updated to include "Benefit Salary" as a subscriber field users can select to appear in the report. Additionally, the report was updated to display the spouse age (if configured that way) for benefits that use the spouse's age for the rate calculation, like the Spouse Life and Critical Illness benefits. Previously, the report would always default to the employee's age instead of the spouse's for these benefits.

Updated Billing Reports and Page to Include Age Band Values (172089, 46253, 68063)

The following areas within Billing were updated to include age band values:
- Updated Adjustment section of the Extended Billing Report to show the age band values for coverages.
- Updated Carrier Account Populations section of the Remittance Summary Report to show the age band, ensuring it's consistent with the summary of the report.
- The Plan Billing Parameters page was updated to display the rate text for benefits with an age band coverage level which is displayed on the Remittance Summary Report. The rate text reflects the value configured on the Define Costs page for the benefit.

Updated Billing Remittance Statement Attachment Format (168707)

The file format of attachments sent via Billing Remittance Statement emails were updated. Statement attachments now default to an .XLS format, making it easier for clients to receive and download the attachment.

Improved Login Security (155019)

Removed vulnerability to time-based identifier/password attacks.

Added Text Message Opt-Out Option for Multi-Factor Authentication (MFA) (161111)

The Text Message method for MFA was updated, allowing users to be alerted when they have opted out of text messages during login. At login, when the administrator has to authenticate with Text Message after opting in, the system will notify the user that they need to opt back in to receive text messages in order to authenticate.

Updates to the Multi-Factor Authentication (MFA) Configuration Page (154131, 154149, 154151)

The following updates were made to the MFA page:
- The "Enable MFA Types" chart was removed from the top of the page to prevent confusion.
- The user options in the "User Types" chart were updated to include Organization Administrator, Employees, Master Administrator, and System Administrator.
- Depending on which options are selected in the "User Types" chart, the corresponding options will appear in the "Methods" chart below it.

Updated Guardian Evidence of Insurability (EOI) Status API Calls (164009, 159655, 159653, 158995)

The Guardian EOI integration was updated to use the new v2 status API call. The v2 status API call includes the following:
- Added rule to deny EOIs pending after 90 days with a closed CEMS, CTST, or CSUS status.
- Added auto-update to approve or decline coverages for EOIs with closed CTST or CSUS statuses.
- Added notification for auto-updated coverages if Guardian believes a subscriber is terminated but the benefits system doesn't.
- Added auto-update to approve or decline coverages for EOIs with REVW, TEST, or SUSP statuses.

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 Polaris release.

Bug Fixes

Fixed Multi-Factor Authentication (MFA) Setup Not Displaying All Configured Methods (153931)

Issue	For some subscribers that edited and saved their preferred MFA method, their other configured MFA methods would no longer appear, even though they had multiple methods configured.
Resolution	The code was updated, ensuring the MFA methods display regardless of changes to the preferred method.

Fixed Users Allowed to Navigate Away from Multi-Factor Authentication (MFA) Setup (162927)

Issue	When an organization is configured to require MFA setup, some users were able to navigate away from the MFA setup page without completing and saving the setup.
Resolution	Added logic to the page, preventing users from leaving the MFA setup page before completing the setup.

Fixed Issue with Subscriber Single Sign-On (SSO) Configuration (154013)

Issue	A bug on the SSO Configuration page was not allowing subscribers to SSO. This occurred for some subscribers that should have been able to SSO using the broker level SSO configuration.
Resolution	The code was updated, ensuring the system properly looks for active accounts by user type when the SSO request is received.

Fixed Error with Password Generator (167317)

Issue	An error would occur when creating a subscriber via the Admin API. The password generator would generate a random password for the subscriber instead of the default password type configured at the client level.
Resolution	The logic for generating passwords was updated.

Fixed Non-Primary Administrators Having Access to Sign End-User License Agreement (EULA) (163159)

Issue	Non-primary organization administrators were able to sign the EULA agreement when logging into the system. Only primary organization administrators should have the ability to sign EULA agreements.
Resolution	Identified and fixed issue in the code, ensuring only primary organization administrators are able to access and sign the EULA agreement..

Fixed Remittance Summary Not Reflecting Billing Fee (171137)

Issue	The Remittance Summary Report was not reflecting the billing fee in the Balance Due field at the top of the page when this field was first introduced in Luna release.
Resolution	The code was updated to include the billing fee in the Balance Due field at the top of the page, matching the total at the benefit level.

Fixed "Total Insured Lives" Column Reflecting Inaccurate Counts (168311 & 163701)

Issue	The "Total Insured Lives" column on the Remittance Summary Statement was showing incorrect counts. It was counting both the employee and dependents (or employee and spouse) for benefits where only the dependent or the spouse only was enrolled.
Resolution	The code was updated to ensure the the "Total Insured Lives" column is accurate. Additionally, any Remittance Summary Statements generated prior to the "Total Insured Lives" column being added in the Luna release were updated to remove the column.

Fixed Users Unable to Download Remittance Statement (165867)

Issue	When attempting to download the Carrier Premium Billing Remittance Statement from the Billing page, users would receive a blank page and be unable to view their statement if the organization name contained a special character, such as forward slash (/).
Resolution	The code was updated, removing special characters from the file names available on the Billing page and also attached to billing emails.

Fixed Recalculation Approving Pended Coverages (161673)

Issue	When coverage was pended per the document request rules and a recalculation was run using the annual enrollment option, the coverage level and cost would be approved even if the document was not provided while still indicating documentation was required.
Resolution	A new feature was added to the calculation process, ensuring coverage is properly pended per the document request rules even if a recalculation is run.

Fixed Renewal Card Not Working on Copy Plan Year Step (169849)

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Issue	When users were on the copy plan year step in the in the renewal wizard, the Renewal card would be blank on the HR Experience dashboard and not allow access to the renewal wizard.
Resolution	The code was updated, ensuring the Renewal card works regardless of the step users are completing in the renewal wizard in the new HR Experience..

Training Topic

Learn how to use the new features in the Polaris Release with the following training topic.

Added Ability to Reset Multi-Factor Authentication (MFA) (156013 & 165571)

Users now have the ability to reset MFA methods for administrators and employees if they become locked out of their accounts.

To reset MFA for an employee:

1. Locate their employee profile in the HR Experience. Then click the "Actions" menu from the top of the profile and select the "Reset MFA" option.
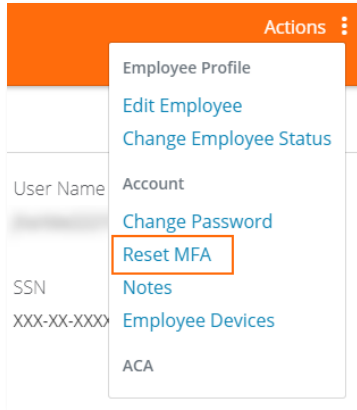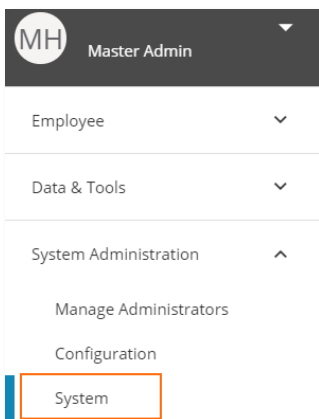

2. This will bring you to a new page with the option to continue or cancel resetting the MFA methods.
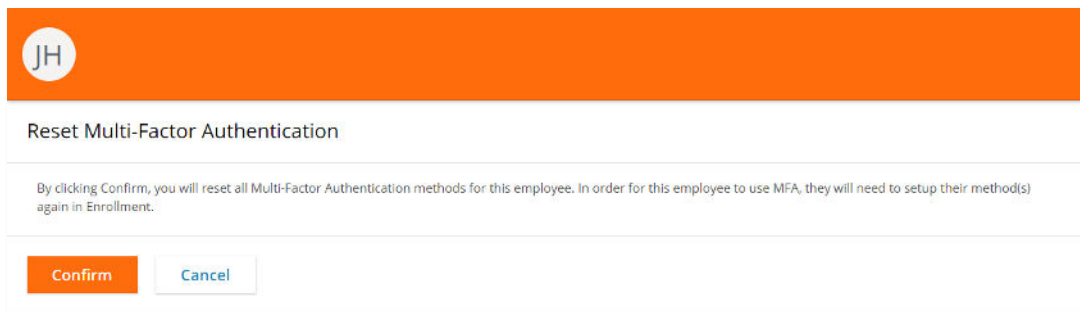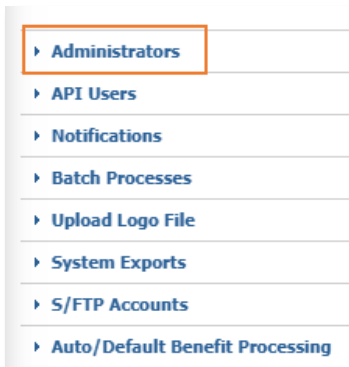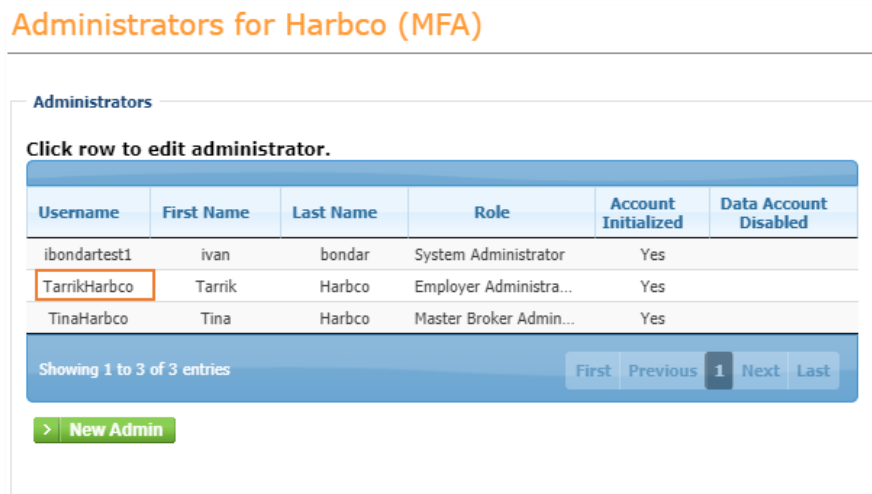

To reset MFA for an Administrator:

1. From the left-hand menu in the HR Experiencee, click the System option.

2. From the page that appears, select the Administrators option from the left-hand menu.

3. Select the administrator from the list.

4. Scroll to the bottom of the page and click the "Reset MFA" button.

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