PLANSOURCE®

Broker Release Notes
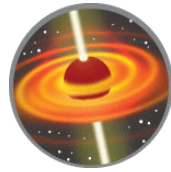
Quasar Release

Version 1.0 December 14, 2017

Contents

New Features

The following new features are part of the Quasar release.

Employee Experience Updates

The following features are updates to Employee Experience.

(74279) Page Content (BenAdmin Self Service API Phase One)

We added the necessary API endpoints for use with the Employee Experience Page Content Editor that is being developed for a future release.

(94471) 2.0 to 3.0 Employee Chat Feature

We added the Click to Chat licensable feature, available in our previous enrollment experience, to the new Employee Experience. Click to Chat is located inside the GuideMe widget when GuideMe is also enabled or as a standalone widget without GuideMe. (This feature is available as part of the employee call center service.)

Advanced Payroll Deductions

The following features are updates to the Advanced Payroll Deductions feature.

(93133) Advanced Payroll Deductions Menu Changed Location

The Advanced Payroll Deductions menu option is now in the top navigation bar between Billing and System.

(94941) Arrears Carryover Maximum Deduction Limit

Administrators can now establish an arrears carryover maximum deduction limit that will supersede the logic in the arrears carryover multiplier field. For example, John's medical deduction is $500 per paycheck and the carryover multiplier is set to 2x his standard deduction. This means that if John has an arrears balance, the system will take up to 2x his $500 deduction for a total of $1000 in arrears deductions in addition to his $500 standard deduction. If a carryover maximum deduction limit is set to $700, it will only allow the system to take the $700 amount and any outstanding arrears balance will remain until the next pay period when the logic will be applied again. This cycle will repeat until the arrears balance has reached $0.

(86003) Validations for Advanced Payroll Deductions Export Scheduling

We implemented validations for export scheduling for Advanced Payroll Deductions. If a schedule is present, it will use the schedule. If no schedule is present, it will export the oldest not-exported schedule for the selected payroll schedule.

(96085, 96087) Reconciliation Report

We created a Reconciliation Report for the Advanced Payroll Deductions feature. The report provides discrepancies between what Advanced Payroll Deductions calculates for benefit deductions and what the import from the payroll vendor says was deducted from an employee's paycheck.

(82893) Advanced Payroll Deductions – Combined Deduction/Adjustment Date – Ranged Report

The new Paycheck Summary Report allows administrator to select a date range for a report that will summarize the deductions and adjustments at a paycheck and benefit level.

(86597) Advanced Payroll Deduction: Multiple Payroll Schedules for Employees Switching Payroll Schedules

For an employee that shifts to a different payroll schedule, the monthly premium now adjusts to account for any arrears balance.

Integrations

The following are updates to PlanSource integrations.

(87919) BambooHR Plugin: Provide all Employee Data Errors after Sync

This feature enhances the error reporting when an employee fails a sync with the BambooHR plugin. The previous version of the error report only included a singular error, even if the employee failed for multiple reasons. The enhanced report now includes those additional reasons to simplify research/resolution.

(88823) BambooHR Plugin: Allow for a BambooHR Field to be Mapped to Multiple PlanSource Fields

This feature allows for one-to-many mapping between BambooHR and PlanSource fields.

(89001) BambooHR Setup Validation

We implemented validations for the BambooHR plugin configuration that warn administrators if they are attempting to navigate away from the page without saving their changes.

(78725) ACA - IRS Form Production and Mailing Enhancement for Tracking

We improved the ability to track 1095-C form status:
Forms that are not approved have a watermark indicating DRAFT.

Official mailing 1095-C forms cannot be produced until the required approvals are complete at the FEIN level. The check box to select the FEIN to approve does not appear on the Produce tab until the FEINs 1095-c forms are approved.

Mailing date will show as "Tentative Mailing Date" and is a required field to produce the official forms.

If forms need to be reproduced for an FEIN, the "Tentative Mailing Date" is required again or the produce button locks and must be unlocked to reproduce.

(84287) New Classification for ACA 2017

We added a new classification to the ACA timeline called In Multi-Employer Plan. This allows you to better handle reporting for employees covered under taft hardy / multi-employer plan participation.

(87041) ACA 2017: Changes Report to Include New Records

For the ACA 1095-C report, there is a new feature that provides the option to "Treat New Records as Changes."

(88165) ACA - Ability to Import 1095-C Form Data

You can now import ACA 1095-C new or updated form information via worksheets.

For more information, see the training topic.

(94135) ACA - Gaining FT Status Excludes Plans Without Minimum Value

When employees gain full-time status due to ACA measurement, and up to that point they have only been offered medical coverage that is not minimum value, the employer is left vulnerable to penalties. The Gaining Full Time work status event is updated to exclude plans that do not provide minimum value.

(95423) ACA - 2017 Forms

ACA reporting forms are updated for 2017. They no longer show the check box for 4980H Transmission relief, as no one is eligible for the relief in 2017.

Forms for 2015 and 2016 remain available and unchanged for mailing and online for subscribers.

(97169) ACA 2017: Updates to ACA Pages

We made the following changes to the ACA pages:

"Show Details" on the ACA timeline is now a button.

The ACA Timeline Screen is now titled "ACA Timeline" rather than "ACA Measurement" since ACA Measurement is a different screen.

The ACA Form Management Page is now titled "ACA Form Management" rather than "ACA Configuration."

We added a download button at the top of the 1095-C form box on ACA Timeline for form downloading.

(94713) Changed Wording for ACA Transmit Tab

The wording on the Transmit tab, when Manual or Automatic transmittal of forms has been rejected, has been updated. The tab now says "Submitted forms have items that need to be resolved before transmission can be completed. Please contact your Account Manager or Service Team for assistance."

DRAFT NOTE: This will be available in iteration 4. No screen shot available yet.

(94795) ACA – Form Production Report

A new report is available in the Report Center. The Form Production report displays information about ACA Form Production.

DRAFT NOTE: This will be available in iteration 4. No screen shot available yet.

(95091) BambooHR Plugin: Updated Run Job to Have Configurable Last Changed Filter and Updated Template

The BambooHR plugin now syncs all employees and allows specific date entry when changes are manually pulled, or sync without date filter. The default template will reflect new fields.

General Updates

The following features are general updates to the PlanSource system.

(27310) New Report: Advanced Payroll Deductions Reconciliation Report

A new report is available in the Report Center: Advanced Payroll Deductions Reconciliation Report. The report shows a list of differences between the Calculation and Import phases of Advanced Payroll Deductions for the check you select when you set up the report.

(79533) Document Management Displays True Decline Plans

True decline plans have been added as selectable options when creating the trigger for a document request rule.
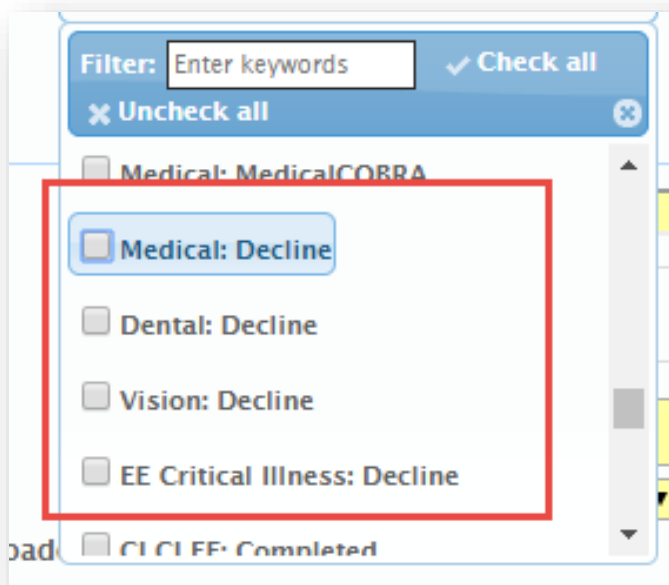
(83835) Report Center and Homepage Updates

We made the following changes to the home page and Report Center.

- Employee Population Quick Graph (located under Quick Stats on the home page)
  - Click the Large Graph link to see the updated graph.
  - You can now print this graph.
  - We added these links to the large graph page:
    - View Employee Census Report
    - View all active employees
    - View all terminated employees
- Benefit Plan Quick Graph
  - We renamed the graph to Elections by Benefit.

- You can now print this graph.
- We updated the look and feel of the graph and made it a bar graph.
- Employee Census Report
  - This report now displays correctly in Internet Explorer.

(95951) Employee Audit Should Honor Field Access Roles

The Changed Fields column under Current Employee Record in Audit has been removed. This will prevent administrators, from potentially viewing field(s) that are not accessible to them due to field access roles.

(96497) New Field in Life Event Report

Life Event Report includes a new field titled "confirmed", when the Status of Open has been selected. This new field indicates if an employee has navigated through the entire enrollment and clicked confirm to conclude enrollment.

(95013) Guardian EOI – Increase Popup Width

We increased the Guardian EOI popup screen size.

(93385) Document Requests – Ability to Disable and Enable Emails

Users can now disable and enable document request emails as well as the missing email popup seen when taking action on a submitted document. The document request emails can either all be suppressed or the admin can disable/enable specific notifications.

For more information, see the training topic.

(93391) Benefit Counts Report

A new report has been created to show current coverage counts for the organization, including waive/decline selections. The report displays the counts by benefit, plan, and coverage tier. This report excludes termed EE and termed coverages.
DRAFT NOTE: This will be available in iteration 4. No screen shot available yet.

(93923) Restrict Report File Download for Population Restricted Administrators

Client Administrators with populations restrictions now only have access to download reports they generated.

(93701) Quick Connect Terms and Conditions

Quick Connect terms and conditions were added to the feature page in renewal wizard.

(88687) Payroll Deduction Report Enhancements

We made some enhancements to payroll deduction report.
- **Show Changes Only** - Will include "New Elections"
- **Show Terminated Employees** - Will include termed employees in reporting
- **Available Employee Fields** - User can now select any Demographic field to display on the report

(92353) Set Population-based Logos in Mobile App

The PlanSource mobile app will now display the correct logo to the employee when multiple logos have been added by population in the Ben Admin site.

(90829) New Default Time Zone for Newly Created Schedules

When creating new schedules, for reports or exports, the default option is now set to the time zone of the user instead of defaulting to UTC.

(95817) Administrator Role Change Layout

The Administrator Role Change Report at the broker level has been updated to match the layout of other reports.

(95815) Overage Dependent Report

The Overage Dependent Report at the broker level has been updated to match the layout of other reports.

(98099) Admin API: GET /administrators

We have created a new endpoint for the Admin API to be able to GET administrator details on a per client basis. This can be done for a single record or batch.

Bug Fixes

The following bug fixes are part of the Quasar release.

General Bug Fixes

We fixed the following general bug issues in the Quasar release.

97075

We enhanced the employee username creation functionality. Previously, when a newly created subscriber failed validation, the user created for the subscriber was not being destroyed, leaving a record in the system which prevented the username from being used again in the future. This has been corrected.

90567

The survey population builder was updated to show only the responses related to the question selected.

96495

Survey responses will now be copied correctly for dependents.

86347

Assumed payments feature will now operate using only the charge from the paycheck prior as opposed to the entire outstanding amount.

90057

The ACA IRS Measurement Graph was updated to display the correct measurement data.

92681

Test subscribers' data will not go over on API unless optional parameter is turned on to do so.

90317

Subscribers are limited to modifying only their dependents.

94227

The system was updated to allow users to correctly update and or save populations.

94529

The system was updated to correctly save the date selected when using the calendar in document request rules.

94757

When updating non-email fields via an Employee Update Worksheet, the system will no longer delete existing email or alternate email addresses when they aren't included on the worksheet.

96757

Data that comes into system via a list will automatically be capitalized.

96981

Benefit Salary will now populate into PlanSource when the BambooHR sync is run.

98419

We updated the BambooHR scheduler coding to find organizations aligned to additional codes.

94349

We decreased document processing page load time to less than one second.

ACA Bug Fixes

The following ACA related issues were fixed in the Quasar release.

93973

Performance of ACA Form Management processing is sped up by coding changes. If you go to Form Management the first time, it will be slightly slower than subsequent times, but it is still significantly faster than the unacceptable performance of over 500+ seconds and timing out.
Multiple offers with different start dates are no longer having their calc_date changed when it should only be the offer with the closest start date.

96977

On the ACA Form Management Page, the Produce and Transmit tabs now show correct statuses for form correction, mailing, and transmission status with the IRS.

Training Topics

The following topics are task walkthroughs related to the new features in the Quasar release.

(88165) ACA - Ability to Import 1095-C form data

You can now import ACA 1095-C new or updated form information via worksheets.

For more information, see the [release note](#).

1. Click the **Data tab** in the top menu bar.
2. Click the link for either a new or updated ACA 1095C Form Import worksheet.
3. Use your browser's tools to download the spreadsheet to your computer.
4. Save the spreadsheet to your computer.
5. Fill in all of the mandatory data where the column header font is red. The black headings are optional.
6. Reference the Instructions tab of the spreadsheet for data formatting questions.
7. Save the spreadsheet with all mandatory data to your computer.
8. Browse to your saved spreadsheet from the ACA 1095C Form Import page.
9. Click Upload.
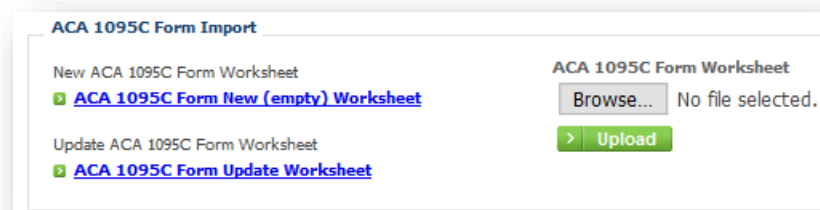
(93385) Document Requests – Ability to Disable and Enable Emails

You can now disable/enable document request emails and the missing email popup seen when acting on a submitted document as well as suppress all emails for a specific document request action.

For more information, see the [release note](#).

Suppress Document Request Emails

1. Click the **Configure** tab in the top menu bar.
2. Click the **Employer Information** configuration step**.**
3. Click the A**dvanced** tab.
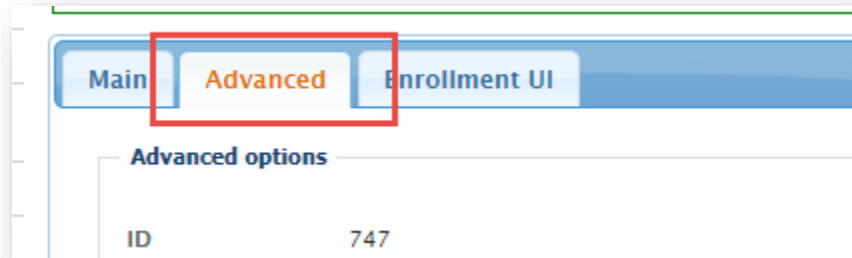
4. Choose from the following options:
   - **Suppress Document Request Emails Only:** Suppresses all document request emails.
   - **Suppress Missing Email Popups:** Suppresses the missing email popup message.

When the Suppress Document Request is selected, users will be notified of a missing email address by a warning appearing document action screen.

Suppress All Emails for a Document Request Action

Users may suppress all emails for an individual action taken on a document request.

To suppress an email on a specific action:

1. Click the **Configure tab** in the top menu bar.
2. Click the **Document Request Rules** configuration step.
3. Click the Suppress Emails checkboxes to suppress emails for the specified action.