

# PLANSOURCE<sup>®</sup>

Ultimate Release Notes



## *Apollo Release*

*Version 1.0 September 13, 2018*

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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 Apollo release.

### Ultimate Features

#### Updated Error Message when Searching for Administrators (95623)

The error message that displays when an administrator cannot be found in the system was updated to be more specific.

#### Updated Default Filter from "All" to "New" for Vendor API Monitor (124943)

The default filter view for pages within the Vendor API Monitor was updated. It now shows users their "new" records by default instead of "all" records. The filter view can still be changed manually on the page, depending on the user's needs.

#### Enhanced UltiPro Plugin Configuration Page (120095)

The UltiPro Plugin Configuration page was updated to provide a better user experience.

#### Updated Ultimate API v2.0 to Use Relative Paging (122415)

To allow more flexibility with future changes, the Ultimate API v2.0 was updated to use relative paging to find pages instead of absolute paging.

#### Added us-context ID to UltiPro Error Message Display (123975)

Updated subscriber import error messaging to include us-context ID when an internal server error is returned from Ultimate.

#### Added Ability to Configure White Labeling for Clients (89097)

Administrators can now configure for a client to customize outbound emails sent from the system to the client's domain. The white labeling configuration can be accessed on the "Advanced" tab on the "Employer Information" page. For more information on how to configure the white label feature, please review the [step-by-step training](#).

### Co-Source Brokers Features

#### Imputed Income for Volume Based Benefit Plans (107203)

To support Canadian employers, Imputed Income was updated. The Imputed Income feature allows users to manage the tax calculation for benefit plans via a formula, which updates the imputed income field for the benefit. This was already available on select benefits, this update now allows users to add a formula to volume-based benefits and benefits that allow dependents.

### ACA Updates

#### Updated ACA Section of Medical Plan Editor (126945)

The ACA section of the Benefit Plan Editor for Medical plans was updated to group the plan settings related to ACA, allowing administrators to easily find, adjust, and explain plan settings that impact ACA reporting. The updates include descriptions of the newly added Minimum Essential Coverage (MEC) field, Minimum Value (MV), and the Conditional Spouse setting. Additionally, these three ACA fields are now required and will default to Null when a new Medical plan is added to ensure the appropriate "Yes" or "No" setting is set.

## Content Management System (CMS) Updates

### Added Ability to Delete Content Blocks in 2.0 & 3.0 (119741)

In 2.0 and 3.0, administrators can now delete non-system content blocks within the page's content editor. To delete a content box, click the trash can icon in the upper right-hand corner of the block. This will result in a notification box asking, "Are you sure you want to delete this content block?" By selecting yes, administrators will delete the content box, return to the page, and the deleted content box will no longer appear.

### Updated Content Blocks in the CMS (122513)

Updates were made to the CMS to make it more responsive. Content blocks now automatically resize the image to fit within the box, eliminating the need to manually resize images. Additionally, page content blocks were updated to more closely resemble dashboard content blocks, meaning the image displays at the top of the content block with the text below.

### New Capability to Add Videos to Page Content (74225)

In 3.0, administrators can add videos to content blocks in the page's content editor. To mitigate security concerns, administrators can only add videos from the supported domains listed in the content editor. If the administrator tries to add a video from a different domain, they will receive a warning that the video is not supported. Once the video's URL is added to the content block, the administrator can save it and the video will appear on the page.

### Added Ability to Assign Populations in 3.0 Page Content Manager (117033)

Administrators can now assign populations to pages within the 3.0 Page Content Manager, ensuring subscribers will only see the information relevant to their population. Administrators have the ability to switch between available populations and edit the page based on the selected population.

## General Features

### Introducing the Employee Communication Tool (112121)

Employee Communication is a newly integrated, centralized tool built within the BenAdmin system, allowing HR professionals to send emails to targeted employee recipients. To start, use a pre-built recipient manager list or contact your Broker or Account Manager to request creation of a custom recipient list. Create a personalized email campaign message for the targeted recipient list from the "Manage Campaigns" page and track the history of the sent campaign after the message has been sent out. Employee Communication will be offered as a Beta product post Apollo release.

**Please note:** the Employee Communication tool does not currently support white labeling.

### Updated Logic for Auto Default Benefit Processing (109643)

New logic was introduced for the Auto Default Benefit processing. Previously, Auto Default benefits were considered active when the configuration of the Auto Default fields were complete. This resulted in the Auto Default Flag serving as a pseudo on/off switch during implementation or renewal, with administrators removing the flag and reactivating as needed to activate the capabilities. To avoid having to manipulate benefit settings, new logic was introduced so the Auto Default Setting would not apply until the following criteria are met:

- The "Actual Go Live Date" in the Account Information section is populated and current.
- The Plan Year in which the Auto Default Setting is configured reaches the start date for Subscriber Open Enrollment **or** coverages exist for non-test subscribers in the plan year.

**Please note:** when configuring a demo group, the "Actual Go Live Date" must be populated for Auto Default settings to apply coverages.

## Administrators can Edit and Save Validated Phone and Cell Phone Number Fields on “My Account” Page (125625, NPV-1540)

A field for Cell Phone Number was added to the "Client Administrator Page" as well as the "My Account Page" for editing. Validation has also been added to only allow a 10-digit number in the Phone and Cell Phone Number fields.

## Added Validation to Phone and Cell Phone Number Fields on “Manage Administrators” Page (125627 & 124911, NPV-1540)

Administrators can now add, edit, and save cell phone numbers on client administrator records. Additionally, when creating or editing a Broker or Client Administrator, the “Manage Administrators” page now validates the phone number and cell phone number fields. This means when users fill out these fields, they must enter a 10-digit number in order for the information to save.

## Premium Billing Report Update (124797)

When generating a Premium Billing Report, the report now runs as a background job to prevent timing out the page if the report count is over 500. Previously a background report only triggered for reports over 1000 lines.

## ACA Updates

### Updated Rule of Parity Notification (120549)

The Rule of Parity Notification feature was updated to limit the Work Status Event (WSE) to subscribers who will be classified as ACA full-time on the first of the month following rehire. When the WSE is triggered for an individual, they should receive an adequate offer of coverage by the first of the month after rehire to ensure compliance with the ACA regulations.

With this update, the ACA Rule of Parity configuration setting will be turned on, and any individual meeting the criteria going forward will trigger the WSE and appear within the Home Page in the ACA section under Rule of Parity. If enabled, an email notification will be sent to the ACA Administrator configured to receive ACA notifications.

### Added Rule of Parity Fields to Employment Records in ACA Timeline (121375)

The fields used in the calculation for application of the Rule of Parity have been added to employment records within the ACA Timeline. These fields provide insight into how Rule of Parity is calculated for an individual’s employment period, along with the determination for whether they are classified as a new hire or continuing employment. Below are definitions for each field.

Is Continuing Employment?	Yes
Rule of Parity Weeks	13
Prior Employment Days	367
Employment Gap Days	90 (12.9 weeks)
Rule of Parity Result	Is continuing employment because gap was not longer than prior employment and gap is less than rule of parity weeks

- **Is Continuing Employment:** Indicates if employment should be classified as new hire or continuing employment upon rehire. If Yes (indicating they are continuing employment), and the Rule of Parity WSE was triggered for the individual, an offer of coverage must be made by the 1<sup>st</sup> of the month after rehire to ensure compliance with ACA regulations.
- **Rule of Parity Weeks:** Either 13 or 26 weeks (26 weeks is utilized for Educational institutions).
- **Prior Employment Days:** Length of employment prior to gap in employment due to termination.
- **Employment Gap Days:** Length of employment gap prior to return/the time from termination to rehire.
- **Rule of Parity Result:** Explanation of why employee is considered as continuing employment or not, based on the fields utilized in the Rule of Parity calculation.

## Enhanced 1095-C Form Production Options for ACA Administrators (116087)

The "ACA: Form Management" module was updated to provide ACA administrators with better control over 1095-C form production.

- On the "Produce" and "Correct" tabs, new fields have been added to allow for additional criteria to be set for generating the 1095-C forms for the appropriate group of employees.
- The "Employees" drop-down indicates whether 1095-C forms should be generated for all employees, employees who have not opted out of receiving a paper form, or only employees who have opted out of receiving a paper form.
- The "Include previously mailed forms" drop-down allows forms that were previously produced, with a mail date already set, to be included or excluded in the new set of produced forms.
- The "Population" drop-down can be utilized to limit form production to a specific population. The population must already be created within the system to utilize it within this dropdown.

## Addition of Minimum Essential Coverage (MEC) Indicator Field to ACA Offer of Coverage Import Worksheet (127029)

The "ACA Offer of Coverage Import" worksheet now includes the field "Is MEC" to indicate whether the plan within an offer provides Minimum Essential Coverage (MEC). This field is required in the worksheet and allows ACA administrator users to modify and review whether a given offer meets the MEC criteria.

## Addition of MEC Field within ACA Offers (127019)

The ACA Offer of Coverage section within ACA Measurement has been updated to allow ACA administrator users to view and update the MEC value for an offer of coverage. A new field called "Is MEC" was added to the Offers table (both view and to edit) within ACA Measurement. When viewing the 1095-C form within ACA Timeline through the 1095-C Editor, the screen will indicate whether the offer for a given month provided MEC. This field is set based on the MEC field within the Medical plan configuration. Manual changes to this field will result in that field remaining as the manually adjusted value, regardless of the setting on the Medical plan for the given offer.

## Content Management System (CMS) Updates

### Added Option to Edit Page Footers in CMS (122497)

The content editor in the CMS now allows users to edit the footer for the "Benefit Confirmation" and "Beneficiary Statement Report" pages.

### Added Link for Administrators to Edit Page Content in 3.0 (116065)

In 3.0, a link was added on the homepage labeled "Page Content Management", allowing administrators to access the page's content editor directly on the page, make edits, and save. Access to this link will only be available to administrators with a specific user role, such as Employer Administrator.

### Removed Employer Contribution Amount on Ineligible Benefits (105503)

In 3.0, the field for "Employer Contribution" was removed from the Benefit Dashboard, Review, and Checkout pages for ineligible and terminated benefits. Now when a subscriber checks out during enrollment, their screen will show the ineligible benefit but not the employer contribution amount.

### Updated Beneficiary Statement Access for Subscribers (105453)

In 3.0, subscribers can now download and print a Beneficiary Statement by accessing the "My Beneficiaries" page available under "Profile". The Beneficiary Statement includes the subscriber's personal, dependent, beneficiary, and employer-customized information.

## 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 Apollo release.

### Ultimate Bug Fixes

#### Fixed Timeout Error when Viewing Deductions History (127163)

<b>Issue</b>	When retrieving the API Transactions history for Deductions, users would receive a 504 Gateway Timeout error.
<b>Resolution</b>	Code was changed in API Transaction for Deductions and Earnings. Created new tables for deduction histories and earning histories and migrated completed transactions older than six months.

## Training Topics

Learn how to use the new features in the Apollo Release with the following training topics.

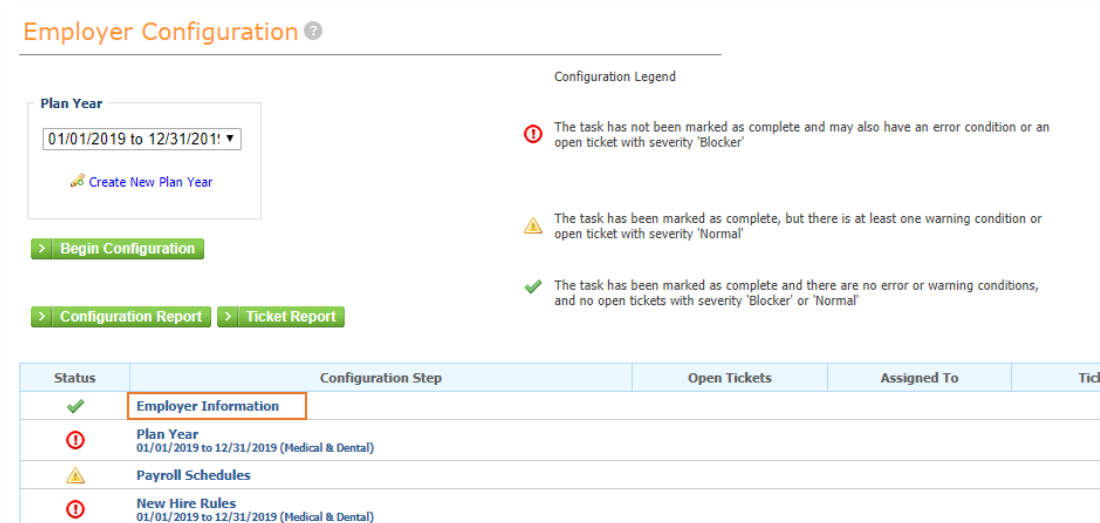
#### Ability to Configure White Labeling for Clients (89097)

To configure white labelling for a client, use the steps below. For additional details, please review the [release note](#).

1. Click on the "Configure" tab from the main menu.



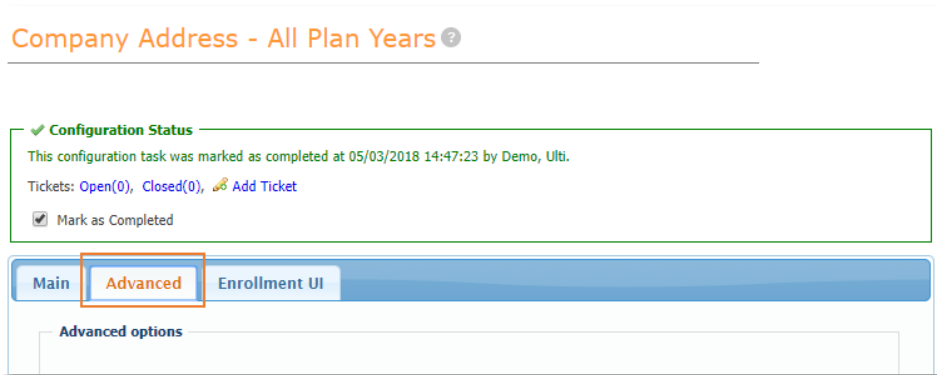
2. Select the *Employer Information* link on the "Employer Configuration" page.



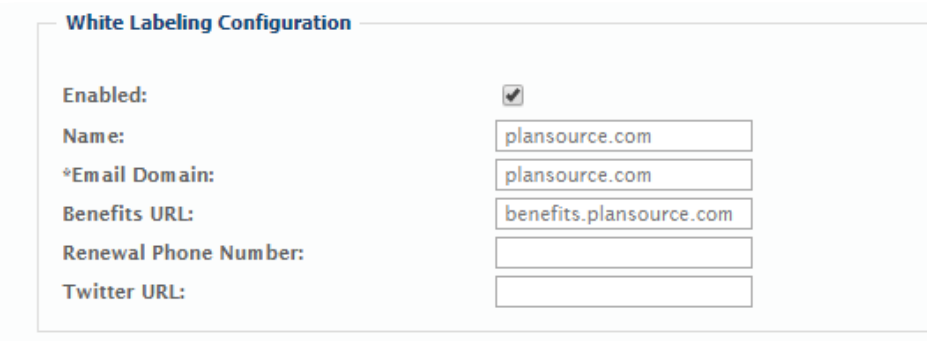
The screenshot shows the 'Employer Configuration' page. At the top, there's a 'Plan Year' dropdown menu set to '01/01/2019 to 12/31/2019' and a 'Create New Plan Year' button. Below that are buttons for 'Begin Configuration', 'Configuration Report', and 'Ticket Report'. To the right is a 'Configuration Legend' with three items: a red circle with an exclamation mark for 'Blocker', a yellow triangle with an exclamation mark for 'Normal', and a green checkmark for 'Complete'. At the bottom is a table with columns: Status, Configuration Step, Open Tickets, Assigned To, and Tick. The 'Employer Information' row is highlighted with an orange border.

Status	Configuration Step	Open Tickets	Assigned To	Tick
✓	Employer Information			
ⓘ	Plan Year 01/01/2019 to 12/31/2019 (Medical & Dental)			
⚠	Payroll Schedules			
ⓘ	New Hire Rules 01/01/2019 to 12/31/2019 (Medical & Dental)			

3. Click the *Advanced* tab.



4. Check the box under "White Labeling Configuration" to enable the feature. Additional fields will appear under the checkbox. Update the fields as necessary.

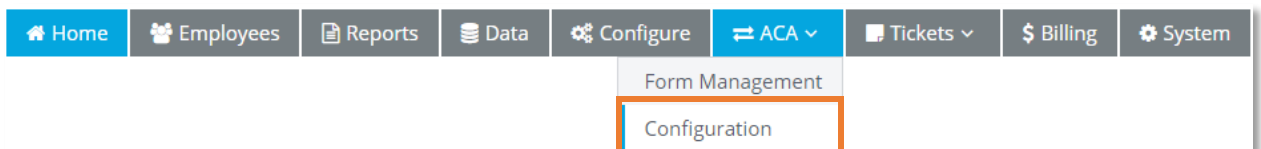


5. After updating the white labeling fields, scroll to the bottom of the page and click "save". All outgoing emails from the system will now be white labelled, using the information added in the previous step.

### Accessing the ACA Standalone Measurement Setting (124433)

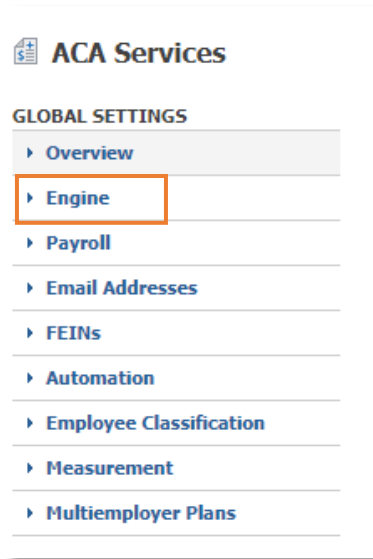
To allow a client to be configured as a Standalone ACA client, changes were made to the Engine settings within ACA Configuration. The "Engine" page now contains a drop down to indicate whether the engine should automatically calculate the Measurement periods or if they will be manually imported by the Standalone ACA client. To access and edit the ACA Measurement setting, use the steps below.

1. Click "ACA" from the main menu.
2. Select "Configuration" from the drop-down options.

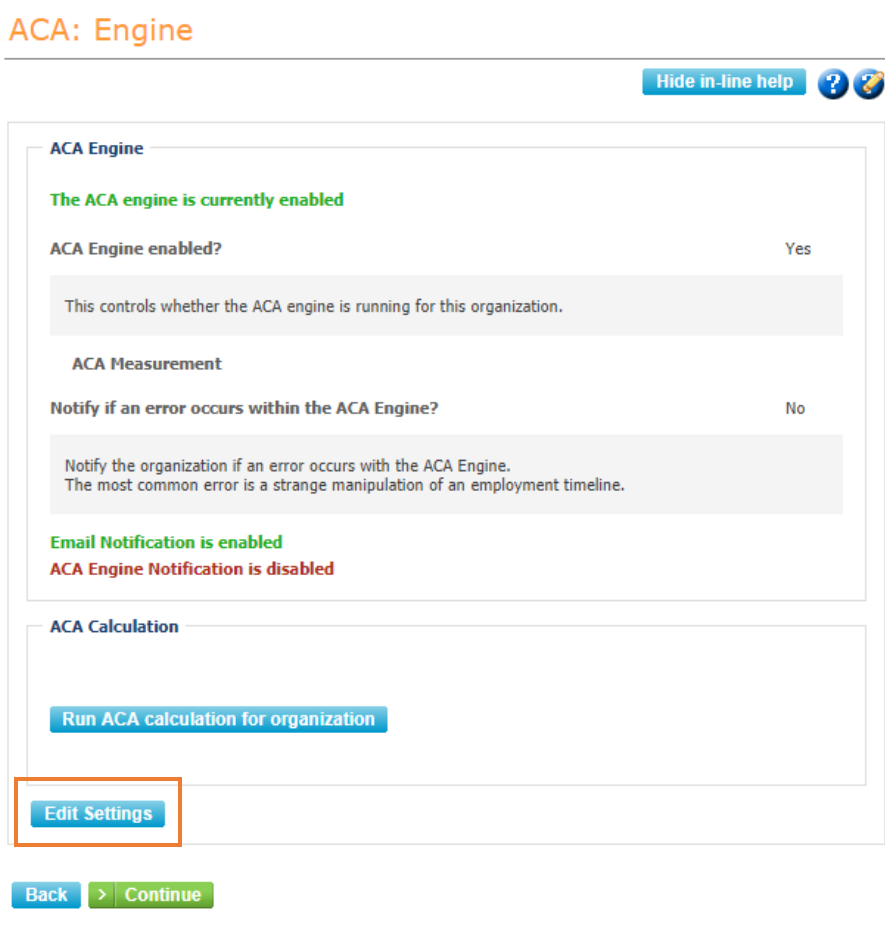




3. Select *Engine* from the left-hand menu.



4. Click "Edit Settings".



5. This opens the settings page which indicates how the ACA Measurement is calculated. Use the drop-down menu to edit this setting. Automatically Calculated should be set when a client is utilizing the PlanSource system as a Benefit Administration client. Manually Provided should only be set when the client is a Standalone ACA client, using the PlanSource system for ACA 1095 form creation but not for Benefit Administration.

**ACA: Engine**

Hide in-line help ?

**ACA Engine**

ACA Engine enabled?

This controls whether the ACA engine is running for this organization.

ACA Measurement **Automatically Calculated** ▼  
Automatically Calculated  
Manually Provided

Notify if an error occurs within the ACA Engine?

Notify the organization if an error occurs with the ACA Engine.  
The most common error is a strange manipulation of an employment timeline.

Back > Save