



# January

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## 2023 Release Notes



**VBA Software**

## General Changes

### LTC Functionality – Part 1

As the first step in creating LTC functionality, we will be displaying some of the upcoming changes related to LTC. One of these upcoming changes is a new 'LTC Options' tab within the 'Plan Information' section of the 'Plan' screen. This tab will allow Users to modify their LTC settings for a given plan. While viewing a Plan, Users will also find a new 'LTC Base' option within the 'Plan Benefits' section. This will identify the 'Base' LTC benefit, and it will be required for LTC plans to have a single 'Base' benefit.

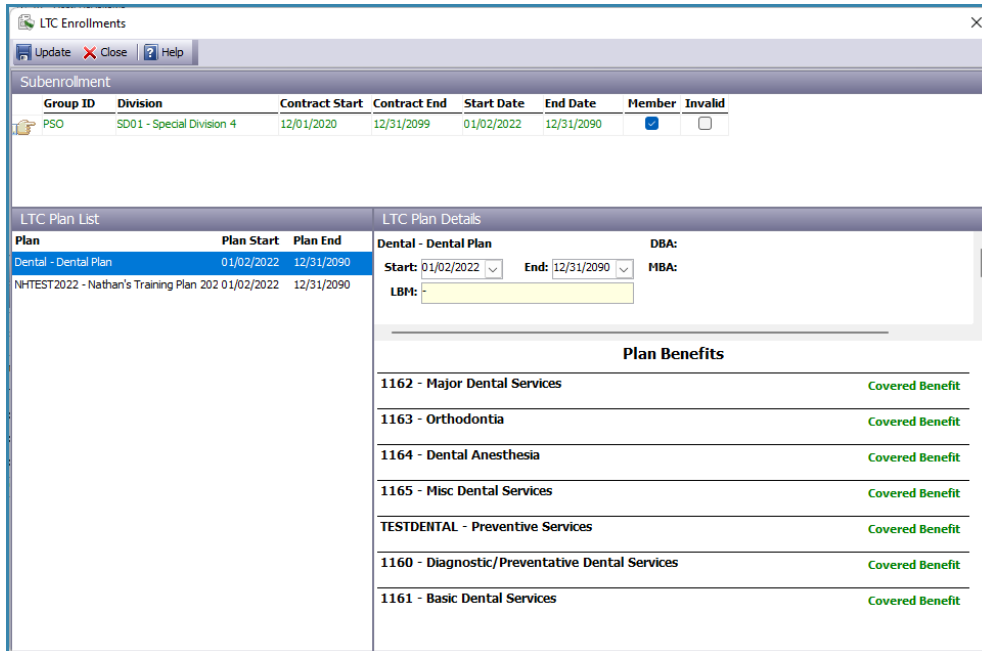
The screenshot shows the 'Plan Information' screen with the 'LTC Options' tab selected. Below the tab are several input fields: 'Daily Benefit Amount', 'Monthly Benefit Amount', 'Lifetime Benefit Max' (with an 'LBM Type' dropdown), 'Joint Policy?' checkbox, 'Apply Elimination Period?' checkbox, and 'Apply Waiver of Premium?' checkbox. At the bottom, the 'Plan Benefits' table is visible with the 'LTC Base' column highlighted.

Benefit Code	Description	Eff. Date	Term.Date	Covered	Excluded	Rider	LTC Base	Apply Ex	Ex Code
1139	Abortion	00/00/0000	00/00/0000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
1139_new	Abortion	00/00/0000	00/00/0000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Users will also find a new 'LTC Options' tab within the 'Plan Benefit Information' section of the 'Plan Benefit' screen. This tab will allow Users to define LTC amounts at the benefit level.

The screenshot shows the 'Plan Benefit Information' screen with the 'LTC Options' tab selected. Below the tab are several input fields: 'Use Benefit DBA?', 'Use Benefit MBA?', 'Use Benefit Lifetime Max?', 'Inflation Benefit?', 'Apply Inflation?' (with a note: 'Inflation Benefits cannot be flagged to Apply Inflation as they work with other benefits to come to a benefit amount. Use this flag on non-Inflation benefits to denote that this benefit should have inflation (from other defined Inflation Benefits) applied to the benefit amount.'), 'Shared Benefit?', 'Use Pct. of Benefit?', 'Applies to Elimination Period?', and 'Applies to Waiting Period?'.

When viewing an enrollment, Users will now see an ‘LTC Enrollments’ button in the top toolbar. Selecting this will open the ‘LTC Enrollments’ screen, where Users will be able to find information on the selected Subscriber’s LTC plans.

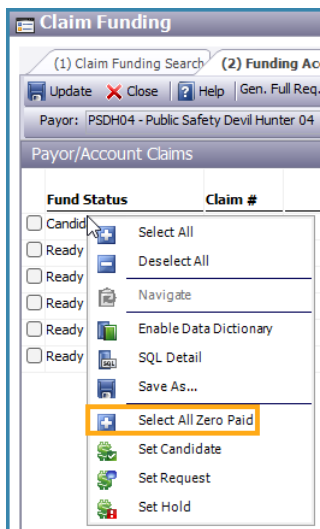


More specifics and further changes will be coming in future releases.

## Accounting Services

### Select All Zero Paid Claims

[F20035] A new ‘Select All Zero Paid’ option has been added to the right-click context menu within the ‘Funding Account’ screen (‘Accounting Services’ > ‘Funding’ > ‘Claim Funding’ > Select a Funding Account). This option will select all claims that have a “0.00” ‘Paid’ amount.



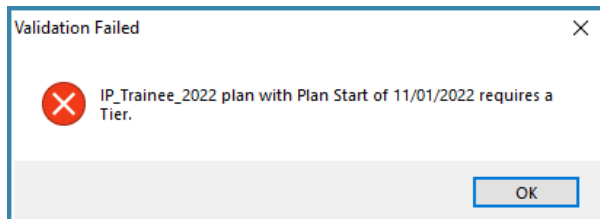
## Benefit Services

### Plan Types Tier Requirement

[F19700] A new 'Tier Req.' option has been added to the 'Plan Types' screen within 'Benefit Configuration'.

Plan Types																
Search Criteria																
Plan Type	Description	Cap.	Med.	Dent.	Vis.	Flex	Life AD&D	Disc. Card	RX	STD	LTD	HRA	HSA	Print on ID Card	Tier Req.	
ME	Medical Plan	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
DE	Dental Plan	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

If a User attempts to make an update within the 'Manage Enrollments' screen when a plan requiring a tier has been selected, the User will receive a prompt informing them that a Tier is required – if the 'Tier' field is empty.



## Billing Services

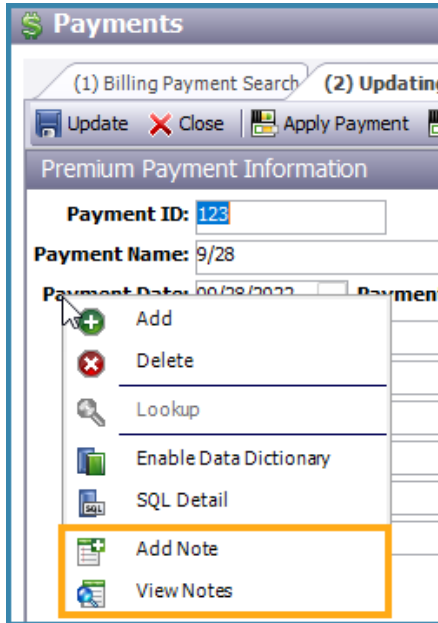
### ★ Rate Change Wizard Update

[F18754] Users will now be able to edit all fields of a selected rate within the 'Rate Select' step of the 'Rate Change Wizard'.

Premrate ID	Group ID	Division ID	Plan ID	Plan Type	Tier	Category	Basis	Description
<input type="checkbox"/> 1					F	Admin Fee	Tier Basis	
<input type="checkbox"/> 1					F	Admin Fee	Tier Basis	
<input type="checkbox"/> 1122			1596		EE	Admin Fee	Life Premiums	
<input type="checkbox"/> 1122			1596		EE	Admin Fee	Life Premiums	
<input type="checkbox"/> 1122			1596		EE	Admin Fee	Life Premiums	
<input type="checkbox"/> 1122			1596		EE	Admin Fee	Life Premiums	
<input type="checkbox"/> 1122			1596		EE	Admin Fee	Life Premiums	
<input type="checkbox"/> 11223			123			STD Premium	Tier Basis	
<input type="checkbox"/> 11223			123			STD Premium	Tier Basis	

## Notes Added to Premium Payments

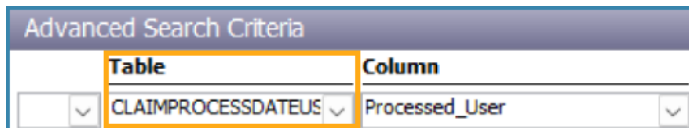
[F18983] A new 'Payment' 'Note Type' has been added, and note functionality has been added to the 'Payments' area within 'Billing Services'. Users may now add and view notes by right-clicking within the 'Premium Payment Information' section of the 'Updating Payment' screen and selecting either 'Add Note' or 'View Notes' from the context menu.



## Claim Services

### New Advanced Search Table

[F20210] The 'CLAIMPROCESSDATEUSER' table has been added to the 'Advanced Search' screen. This will allow Users to search using information from this table. Most notably, Users will be able to search processed claims by the User who processed them.



## Enrollment Services

### Sex Field Configuration

[F7155] The 'Sex' field found within 'Member Information' is now configurable through the 'Gender' configuration screen ('Enrollment Services' > 'Enrollment Configuration' > 'Gender'). Users will be able to configure 'Gender Codes' and 'Descriptions' as well as assign a HIPAA Code to a created gender as either 'Male', 'Female', or 'Unknown'.

Search Criteria		
Gender Code	Description	HIPAA Code

Search Results		
Gender Code	Description	HIPAA Code
#	Testing 7155	Unknown
F	Female	Female

### Case Head Type Added to Details

[F17343] 'Case Head Type' has been added to the 'Case Head' screen ('Enrollment Services' > 'Enrollments' > Select an enrollment > 'Case Head' from the 'Details' menu).

Case Head ID	Case Head Name	Eff. Date	Term. Date	Case Head Type
		00/00/0000	00/00/0000	

★ **Secondary and Tertiary Beneficiaries**

[F20162] Within the ‘Member Beneficiary’ screen, when adding a new beneficiary, Users may now select either Primary (‘Pri.’), Secondary (‘Sec.’), or Tertiary (‘Ter’) as the beneficiary level. These beneficiaries will be displayed as their selected level within the ‘Life Payment Creator’.

Enrollments

(1) Member Search (2) Updating Denji Hayakawa (106537811)

Member Beneficiary

Update Close Help

Member: Denji Hayakawa (01)

Member Beneficiary List

Beneficiary ID	First Name	Last Name	Long Name
331878793952			

Totals Pri: 0 Sec: 0 Ter: 0 Non

Member Beneficiary

Beneficiary ID: 331878793952 SSN:

First/Last Name:

Long Name:

Date of Birth: 00/00/0000

Address:

City/State/Zip:

Country:

Percentage: .00 Assignment: .00

Start Date: 00/00/0000 Exclude Interest:

End Date: 00/00/0000 **Pri:  Sec:  Ter:**

Relationship:

**Sponsor Screen**

[F20176] A new ‘Sponsor’ screen has been added and is accessible through the ‘Details’ drop-down menu when viewing an enrollment. This screen allows Users to identify the Sponsor’s Subscriber ID and identify the relationship of the Sponsor to the sponsored Subscriber. This may be useful for eligibility verification and auditing purposes.

Details: Sponsor Go Disenroll Reenroll

Mem Sponsor

Update Close Help

Sponsor

Sponsor ID:

Sponsor Relationship:

01 Den

02 Pow

03 Aki

## Termination Reason Added to Manage Enrollments

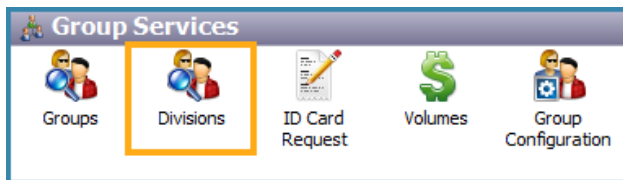
[F20178] A new 'Term Reason' field has been added to the 'Manage Enrollment' screen in the 'Enrollment Plan' section. This will allow Users to specify a reason for ending coverage. These 'Term Reasons' may be configured within 'Enrollment Configuration' > 'Disenroll Reasons'.

Enrollment Plan							
Plan	Plan Start	Plan End	Tier	Use Scale	Volume	Paid Through	Term Reason
Dental - Dental Plan	01/02/2022	12/31/2090	F - Family	<input type="checkbox"/>	.00	00/00/0000	

## Group Services

### ★ New Division Search Screen

[F18981] A new 'Division' area has been added to 'Group Services'.



This area allows Users to search for Divisions by 'Group ID', 'Group Name', 'Division ID', and 'Division Name'. Selecting a Division from the search results will navigate to the selected Division within the Group screen.

Divisions			
(1) Group Search			
Search    Advanced Search    Load Criteria    Refresh    Close    Select    Help    Sort    Filter			
Search Criteria			
Group ID	Group Name	Division ID	Division Name
pso			
Search Results			
Group ID	Group Name	Division ID	Division Name
PSO	Public Safety Offices	SD01	Special Division 4



## Disable COBRA Rate Auto Select

[F19994] A new 'Disable COBRA Auto Select' flag has been added to the 'Additional/Cobra Settings' screen ('Groups' > Select a Group > 'Additional/COBRA Settings' from the 'Details' drop-down). Selecting this flag will require Users to choose a COBRA 'Premium Rate' during the Member disenrollment process.

Prior to selecting rates, the Division name will not appear in the COBRA Division field to help remind users to manually select rates. Upon opening the COBRA Premium Rate Selection window, the rates that would have been auto selected by the system are selected to show the user what would have been chosen had the 'Disable COBRA Auto Select' flag not been checked.

The screenshot shows a software window titled "Additional/COBRA Settings". The window has a menu bar with "Update", "Close", and "Help" buttons. Below the menu bar, the title "Additional Group Settings" is displayed. The form contains several sections of fields:

- Sec. 111 Employer Size:** Between 20 and 99 Employees (dropdown)
- Admin. COBRA:**  (checkbox)
- Election Range:** 45 Days (dropdown)
- Pay To Account:** 0000159463 - Checking Acct. 3 (dropdown)
- Billing Self-Admin:**  (checkbox)
- Renewal Date:** 00/00/0000 (dropdown)
- Employer Account:** 0000159463 - Checking Acct. 3 (dropdown)
- Enrollment Closed:**  (checkbox)
- Renewal Completion:** 00/00/0000 (dropdown)
- Def. EOB Report:** VBA Explanation of Benefits (dropdown)
- Subscriber ID Prefix:** AB (text)
- Subscriber ID Suffix:** C (text)
- Def. Invoice Report:** CDB Invoice (Subscriber Details) (dropdown)
- Commission Lookback in Months:** 0 (text)
- Paperless?:**  (checkbox)
- Def. Adj. Reason:** Admin Fee (dropdown)
- Inv. Enroll by Day:** (text)
- Inv. Enroll through Day:** (text)
- Dist. Payor:** (text)
- Total Employees:** 3333 (text)
- Calc. Due Date on Bill:**  (checkbox)
- Dist. Acct.:** (text)
- CoPay Max per Svc Date per Provider:**  (checkbox)
- Producer:** (text)
- Acc. Manger:** (text)
- Disable Duplicate Claim Check:**  (checkbox)
- Auth Not Reqd:**  (checkbox)
- Disable COBRA Auto Select:**  (checkbox) - This field is highlighted with a yellow box.

## Provider Services

### Adding Payees from Provider Details Pt. 2

[F20512] Payees that have been added within a Provider's 'Provider Details' screen will now be automatically associated with that Provider's record. This is follow-up feature to feature 20071 from the December release.

## VBA Gateway Services

### Address Change Requests

[F18815] We have added a new request that allows Gateway Members to make changes to all their addresses. This was previously limited to the primary address. These new requests will now be visible within the 'Requests' section of 'VBAGateway Services'.

## Gateway Message Functionality

[F19790] Four new search criteria have been added to 'VBAGateway Services' > 'Messages': 'Portal', 'Provider ID', 'Group ID', and 'Division ID'. These fields will now be displayed when viewing relevant messages. New 'Gateway Messages' buttons have also been added to the top toolbar when viewing Providers, Members, Groups, and Divisions. These will navigate to the message threads pertaining to the Provider, Member, etc.

The screenshot shows the 'Messages' window with a search bar and a table. The search bar includes a search icon, 'Advanced Search', and a dropdown arrow. Below the search bar is a 'Search Criteria' section with a table. The table has columns for 'Thread #', 'Thread Status', 'Thread', 'ad New Messages?', 'Portal', 'Provider ID', 'Group ID', and 'Division ID'. The 'Portal' column is highlighted with an orange border.

Thread #	Thread Status	Thread	ad New Messages?	Portal	Provider ID	Group ID	Division ID

The screenshot shows the 'Divisions' window with a toolbar. The toolbar includes buttons for 'Update', 'Close', 'Add Group', 'Add Division', 'Recalc Accum', 'Contract Subscribers', and 'Gateway Messages'. The 'Gateway Messages' button is highlighted with an orange border.

## New Security Objects

Here are the new security objects for this release:

Security Object	Object Location	Related Feature
'Gender Maintenance'	'Enrollment Services' > 'Enrollment Configuration' > 'Genders'	7155
'Enrollment Sponsor'	'Enrollment Services' > 'Enrollments' > Select an Enrollment > 'Sponsor' from the 'Detail' drop-down menu	20176