May

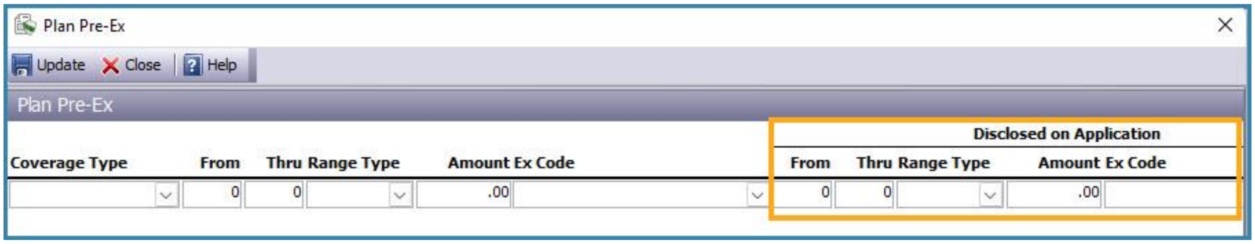
2023 Release Notes

VBASoftware

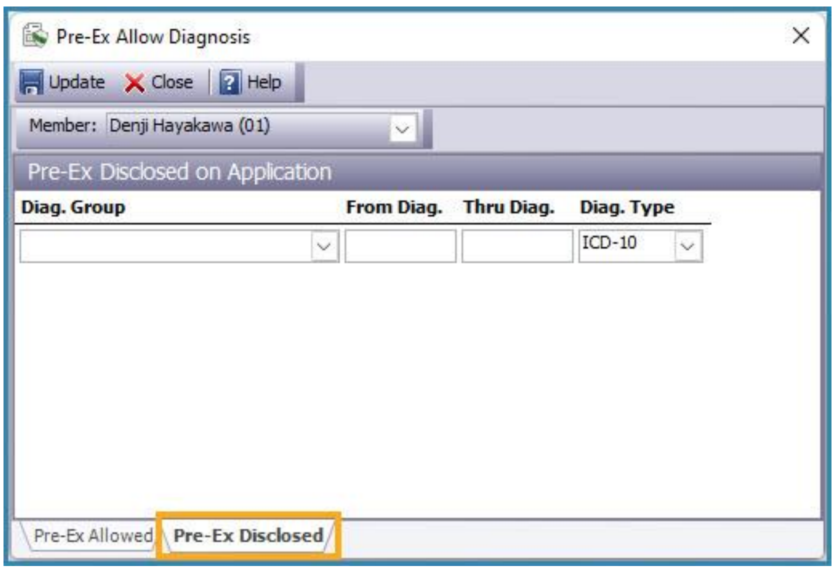
Benefit Services

Pre-Existing Functionality Update

[F22022] Users may now further configure 'Plan Pre Ex' options at the Benefit level within a new 'Disclosed on Application' section in the 'Plan Pre-Ex' window ('Benefit Services' > 'Plans' > select a plan > 'Pre-Ex Settings' from the 'Details' drop-down).



This information will be compared to the 'Pre-Ex Disclosed' tab of the 'Pre-Ex Allow Diagnosis' window on an enrollment ('Enrollment Services' > 'Enrollments' > select an enrollment > 'Pre-Ex Diagnosis' from the 'Details' drop-down).

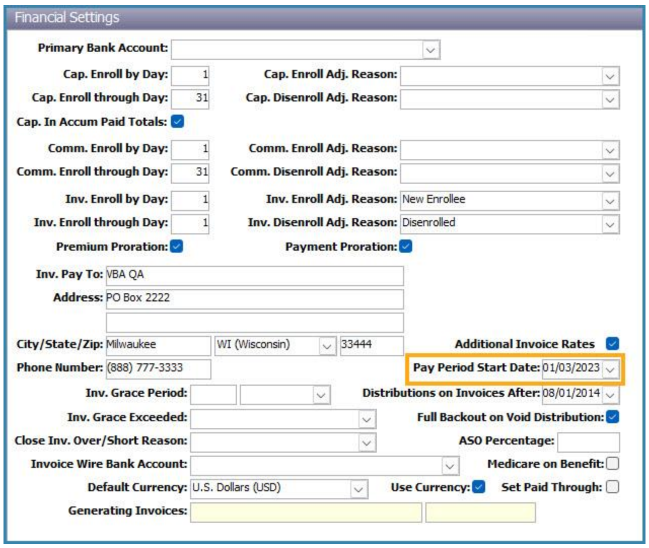


Adjudication will compare this information when deciding if a claim is pre-existing and whether to apply the 'Disclosed on Application' Ex Code from the Benefit 'Plan Pre-Ex' configuration.

Billing Services

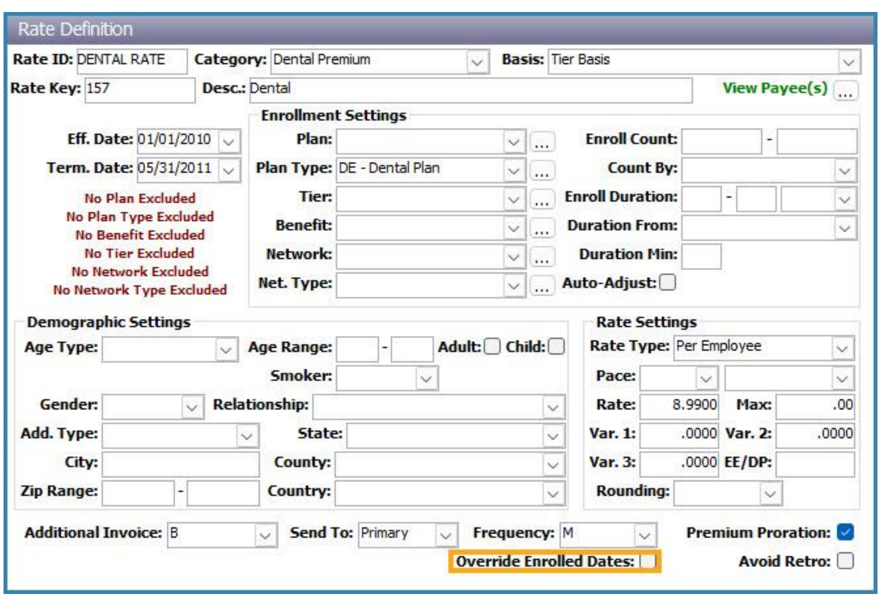
Biweekly Payroll Billing Cycle

[F19966] A new 'Calendar Payroll' 'Billing Cycle' 'Type' has been added to 'Billing Cycle' configuration. This cycle will start in two week increments from the new 'Pay Period Start Date' found within 'System Services' > 'VBA Control Panel' > 'Financial Settings'. The 'Generate Invoice Wizard' will use this billing cycle to calculate the 'Bill From' and 'Thru' dates. These dates will be used to calculate proration as well.



Override Enrolled Dates Premium Rates

[F20997] A new 'Override Enrolled Dates' flag has been added to the 'Rate Definition' screen within 'Premium Rates'. When this flag is selected, invoice generation will ignore the 'Enroll By' dates configured in the 'VBA Control Panel'. If a Subscriber is eligible at any point during the billing period, they will be included in the invoice.

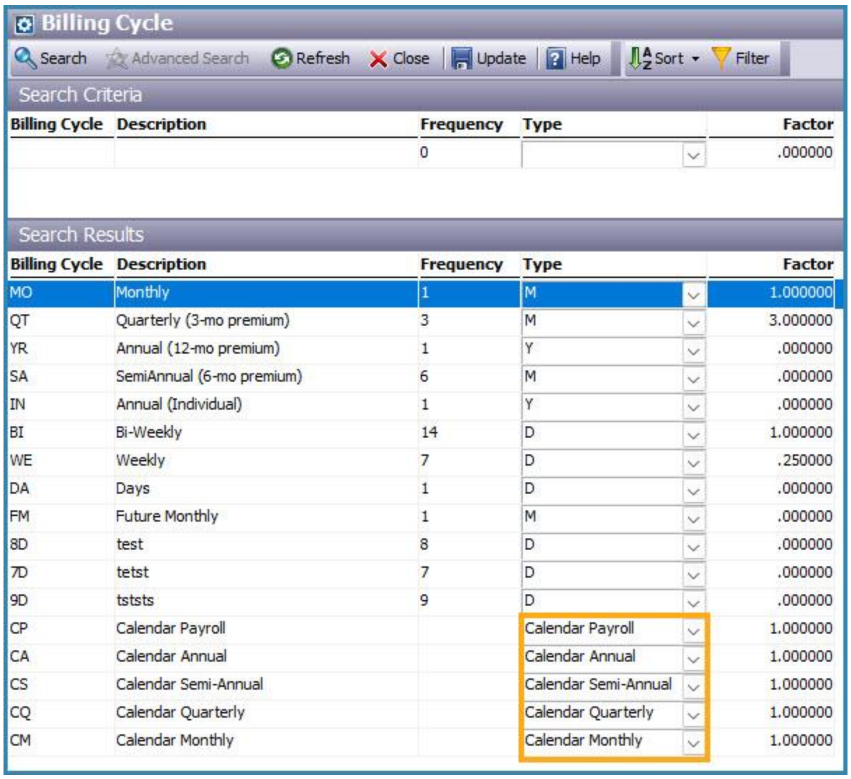


Calendar Billing Cycles

[F20320] New 'Billing Cycles' based on calendar dates have been added:

- Calendar Annual – 01/01 through 12/31
- Calendar Quarterly – 01/01-03/31, 04/01-06/30, 07/01-09/30, and 10/01-12/31
- Calendar Semi-Annual – 01/01-06/30 and 07/01-12/31
- Calendar Monthly – 01/01-01/30, etc.

These billing cycles will need to be configured within 'Billing Services' > 'Billing Services Configuration' > 'Billing Cycles' and select the desired 'Type'. The 'Generate Invoice Wizard' will use these billing cycles to calculate the 'Bill From' and 'Thru' dates. These dates will be used to calculate proration as well.

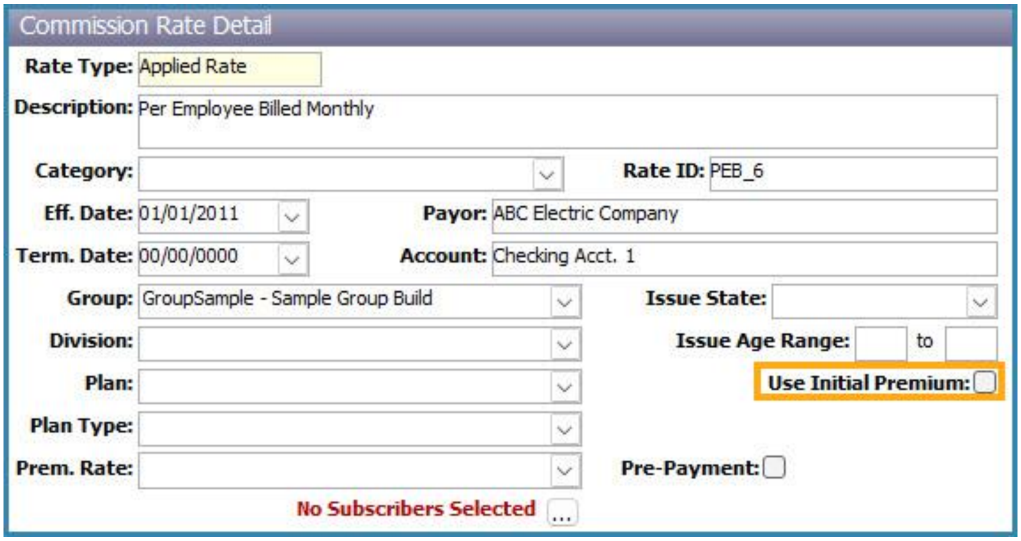


Billing Cycle	Description	Frequency	Type	Factor
MO	Monthly	1	M	1.000000
QT	Quarterly (3-mo premium)	3	M	3.000000
YR	Annual (12-mo premium)	1	Y	.000000
SA	SemiAnnual (6-mo premium)	6	M	.000000
IN	Annual (Individual)	1	Y	.000000
BI	Bi-Weekly	14	D	1.000000
WE	Weekly	7	D	.250000
DA	Days	1	D	.000000
FM	Future Monthly	1	M	.000000
8D	test	8	D	.000000
7D	tetst	7	D	.000000
9D	tststs	9	D	.000000
CP	Calendar Payroll		Calendar Payroll	1.000000
CA	Calendar Annual		Calendar Annual	1.000000
CS	Calendar Semi-Annual		Calendar Semi-Annual	1.000000
CQ	Calendar Quarterly		Calendar Quarterly	1.000000
CM	Calendar Monthly		Calendar Monthly	1.000000

Commission Services

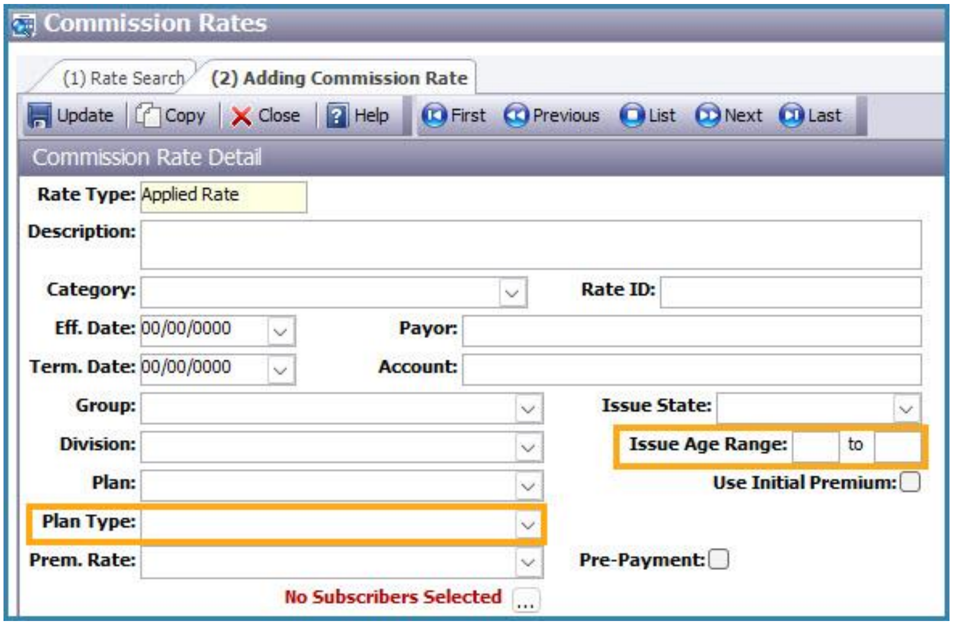
Commission Calculated on Initial Premium

[F22000] A new flag has been added to 'Commission Rate Detail' within 'Commission Services' > 'Commission Rates', 'Use Initial Premium'. When this option is selected, commission will be calculated using the premium rate from the first bill instead of the current bill's rate.



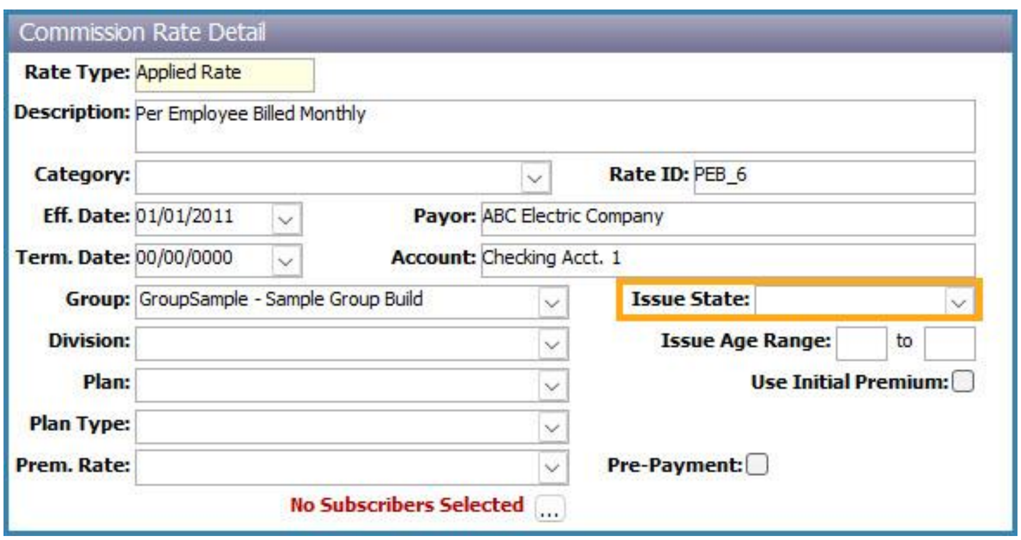
Commission Calculated by Issue Age

[F22007] Users may now configure commission to be calculated by 'Issue Age Range'. This will allow calculations based on the original 'Enrolled Date' within a specific 'Plan Type'. 'Issue Age' is defined as the age of the Subscriber when they were first enrolled in the policy. 'Issue Age Range' can only be used when a 'Plan Type' is defined within 'Commission Rate Detail'.



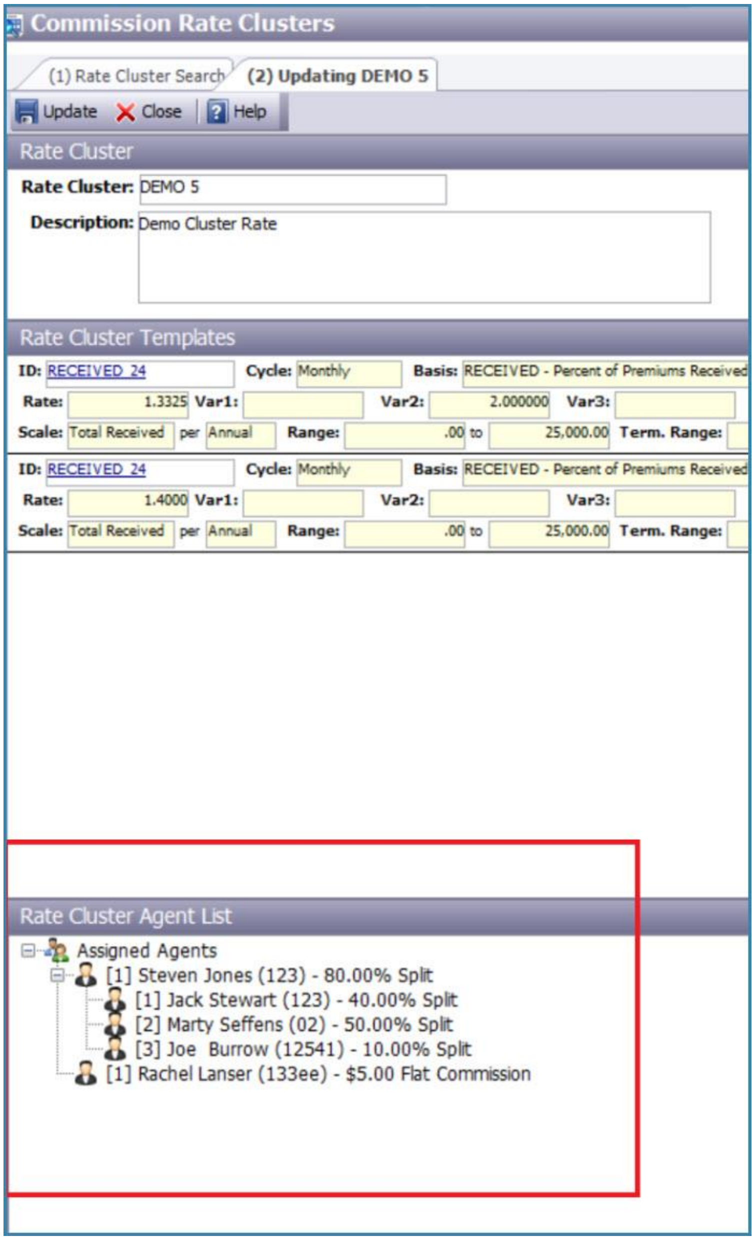
Commission Rate by State

[F22008] 'Commission Rates' may now be defined by state by utilizing the new 'Issue State' field within 'Commission Rate Details'. This field will be compared to the 'Issue State' within 'Subscriber Details' when determining whether a rate should be applied to an associated premium.



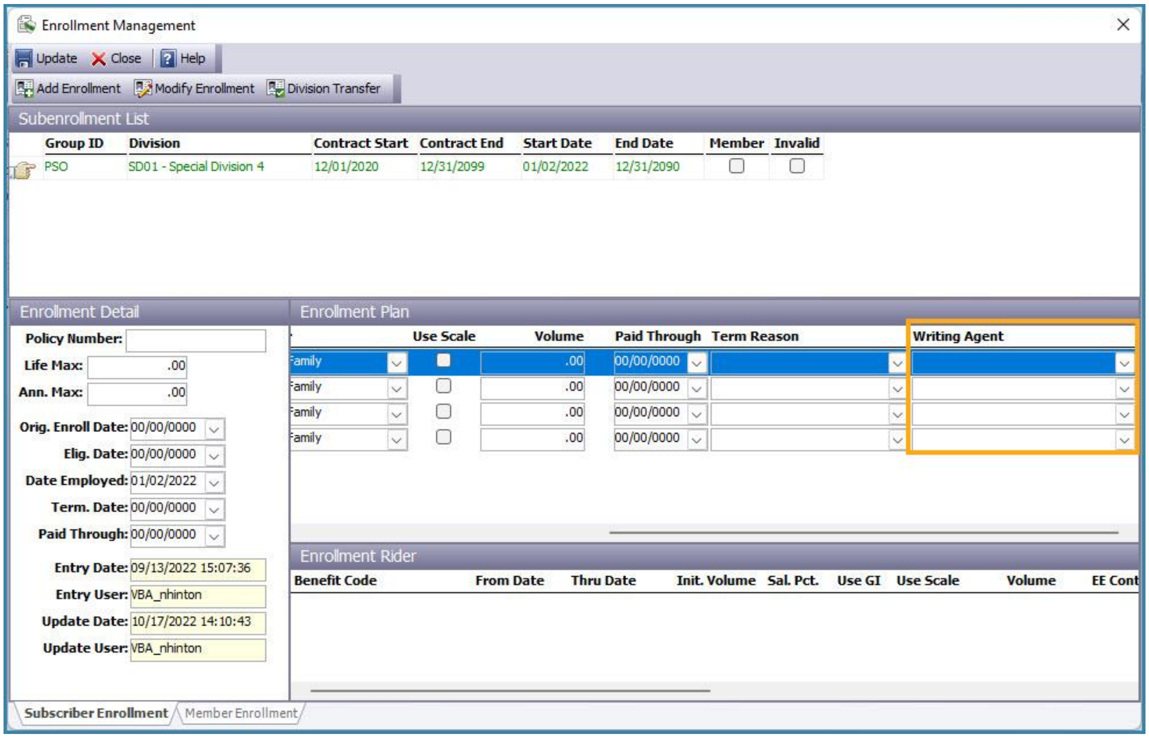
Commission Agent Rate Assignment

[F22010] Users may now build an 'Agent' structure for specific 'Commission Rates' as a 'Rate Cluster Agent List'. These commission structures will be attached to the rate and will be applied when the associated rate is selected for a Group.



Writing Agent by Enrollment

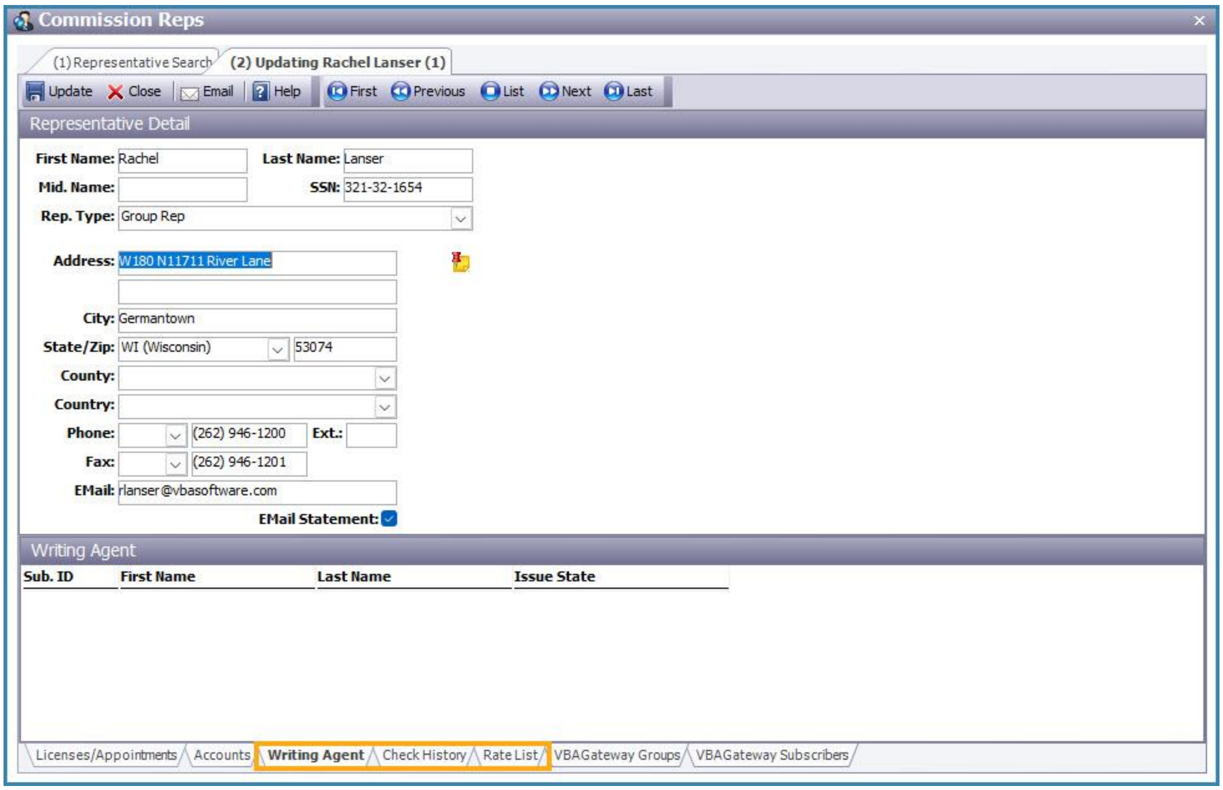
[F22012] Agents may now be attached to an 'Enrollment Plan' by using the 'Writing Agent' field within the 'Enrollment Management' screen. This allows Users to restrict rates by 'Subscriber', 'SubEnrollment Plan', and 'Agent'.



New Information Added to Commission Reps

[F22013] As part of the above changes to Commission Rates and Agents, three new sections have been added to the 'Commission Reps' screen:

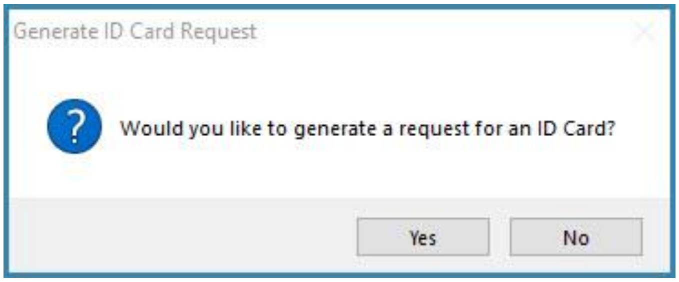
- 'Rate List' – displays all rates attached to the Agent, including the schedule (Rate Cluster) they belong to.
- 'Check History' – displays a full payment history by invoice for the Agent.
- 'Writing Agent' – displays the Subscriber ID, First Name, Last Name, and Issue State from any Subenrollment Plans that the agent is attached to as a 'Writing Agent'.



Enrollment Services

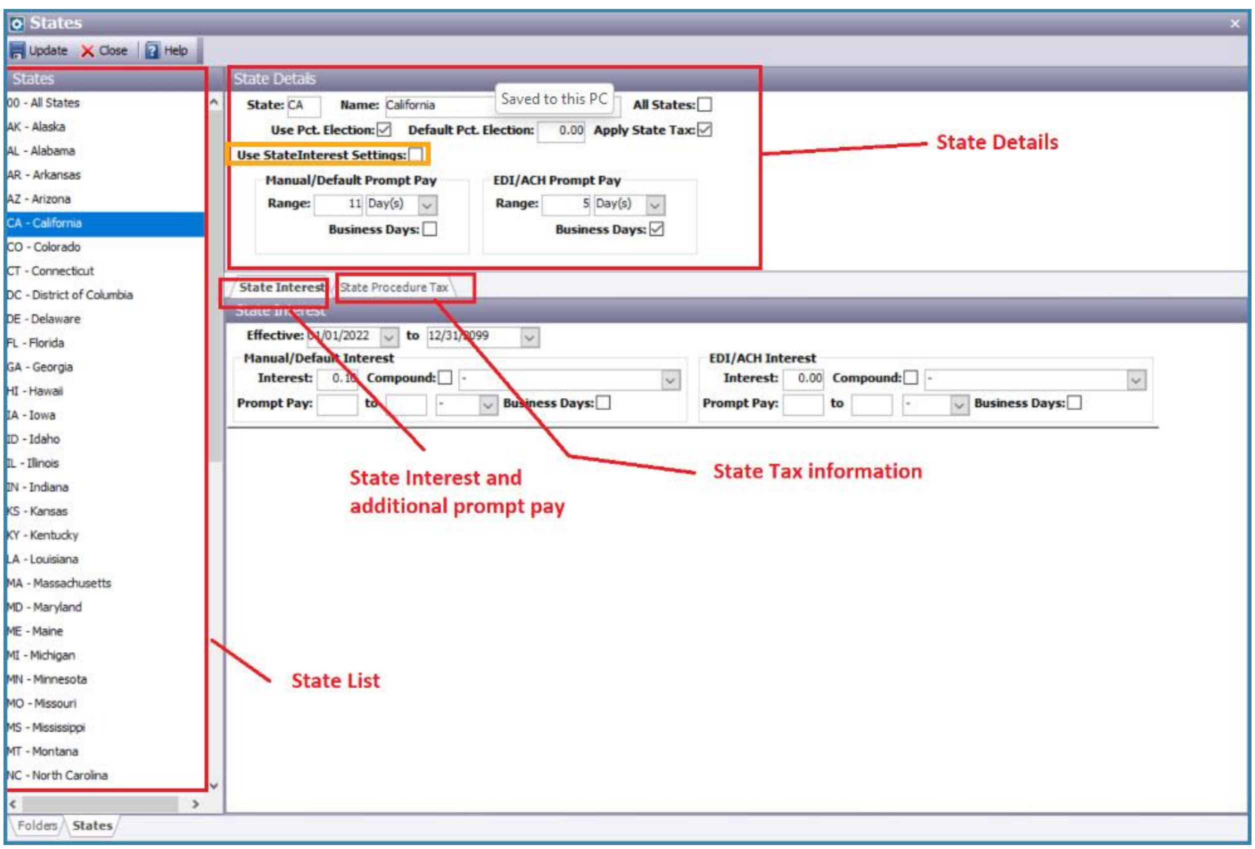
ID Card Automated Prompt

[F20168] A new Control Panel setting has been added within 'Application Settings' :' Prompt for ID Card Enrollment'. When this option is selected, and a Member record is modified and updated, the system will generate a prompt asking the User whether they would like to create a new ID Card request.



State Interest Updates

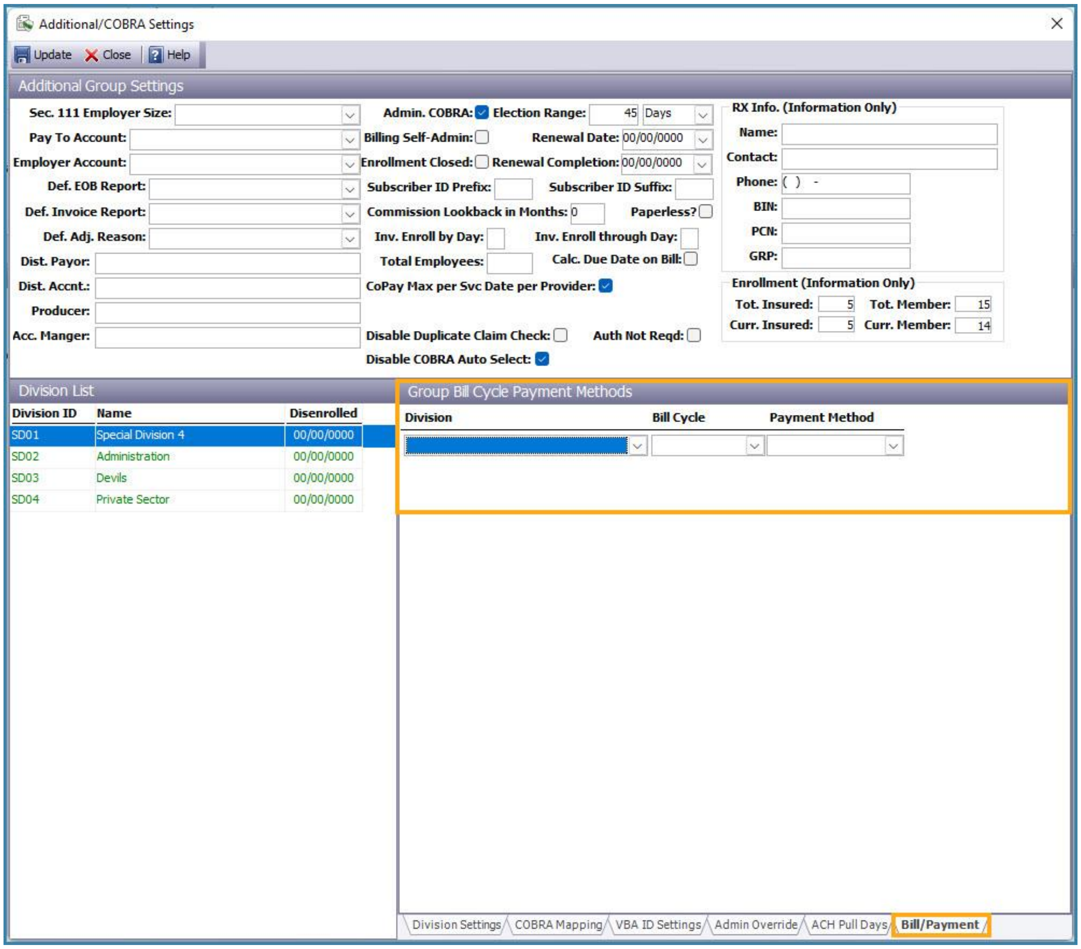
[F22023] The previously-separate 'State', 'State Interest', and 'State Tax' screens have now been combined into a single 'State' configuration screen within 'Enrollment Services'. Adjudication has been modified to allow interest calculations set for different timeframes and prompt pay settings. To use 'Detail Settings' instead of the state-level settings, Users may select the 'Use StateInterest Settings' option within 'State Details'.



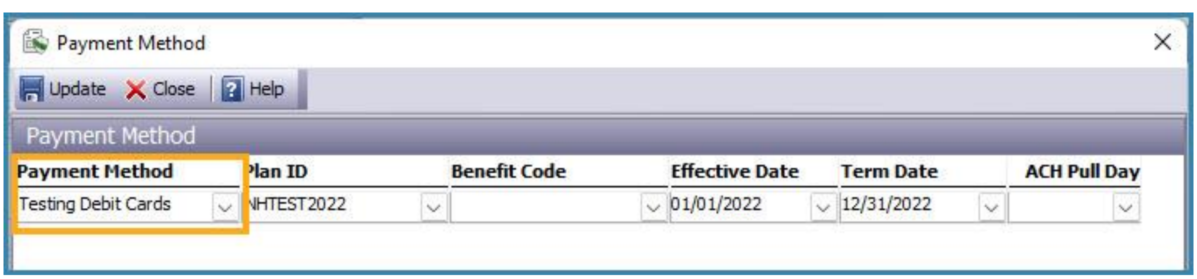
Group Services

Group/Division Bill Cycle Payment Methods

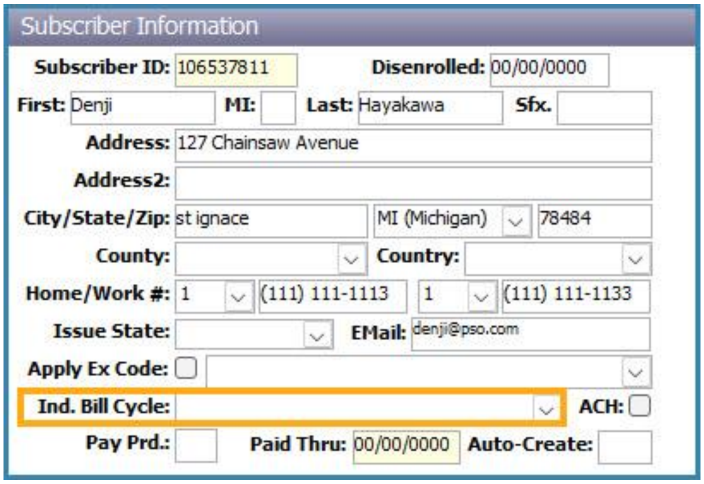
[F21777] A new 'Group Bill Cycle Payment Methods' section has been added to the 'Additional/COBRA Settings' screen within Groups.



This section will allow Users to configure which 'Payment Methods' are available for Subscribers based on the 'Individual Billing Cycle' assigned to them. These are the 'Payment Methods' that will be available within the 'Sub. Payment Method' screen within 'Enrollment Services'.

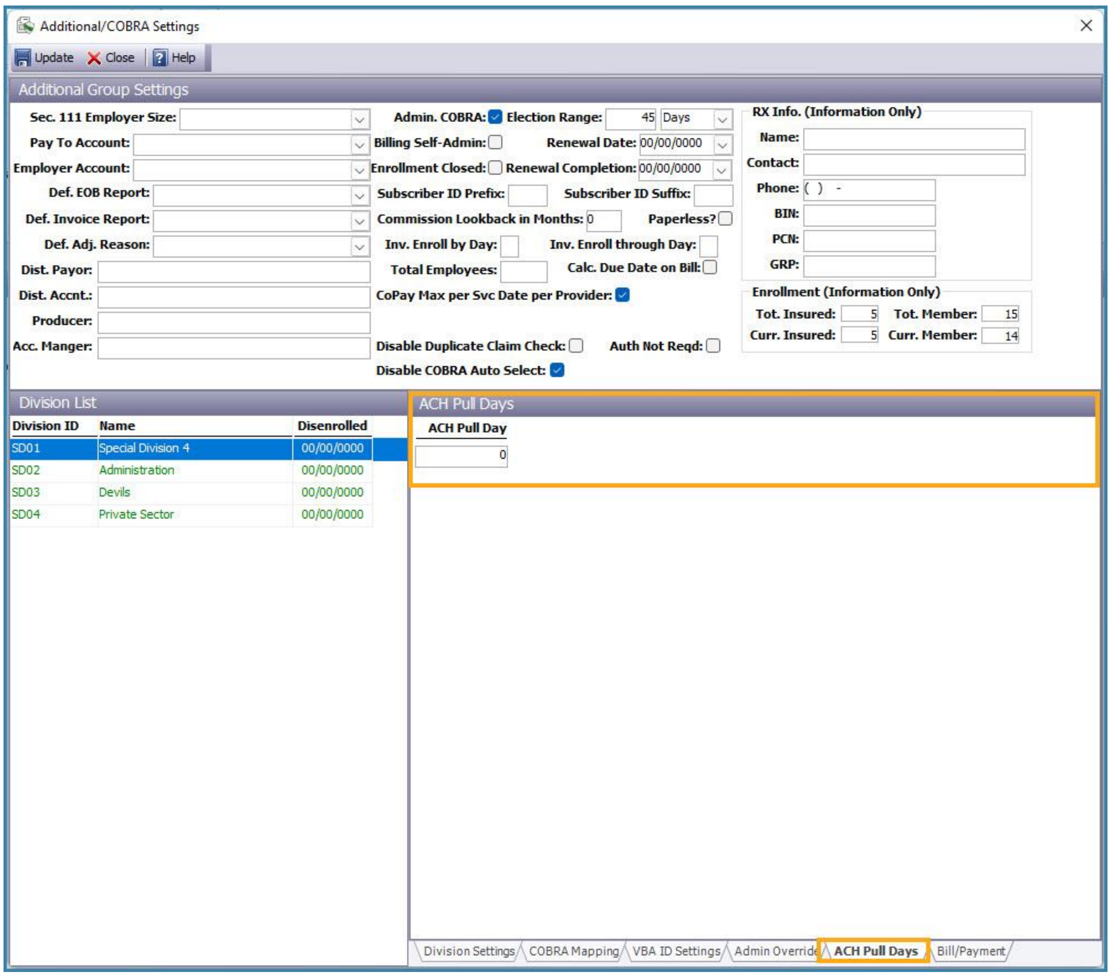


If a Subscriber does not have an 'Ind. Bill Cycle' assigned within 'Subscriber Information', all 'Payment Methods' will be available to them. This is to avoid impacting current functionality.

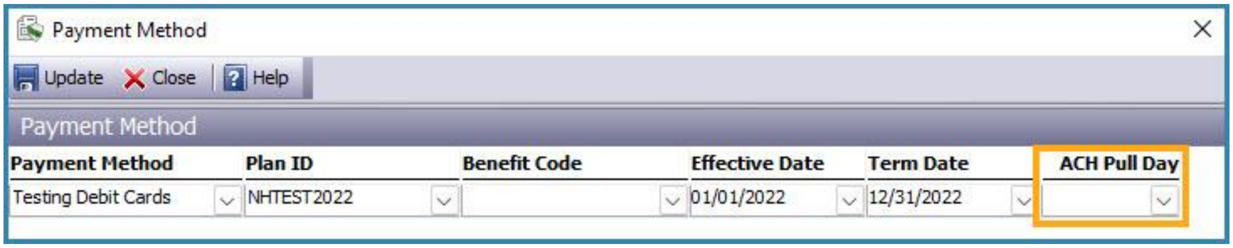


Group/Division ACH Pull Days

[F21869] A new 'ACH Pull Days' section has been added to the 'Additional/COBRA Settings' screen within Groups.



This section will allow Users to configure what options for 'ACH Pull Days' are available for Subscribers on the 'Sub. Payment Method' screen within 'Enrollment Services'.



Issue and Situs State Fields

[F21870] New 'Issue State' and 'Situs State' fields have been added to 'Subscriber Information' within 'Enrollment Services' and 'Plan Information' within 'Benefit Services' respectively. 'Issue State' is used as a reference to match the 'Issue State' at the Subscriber level with the 'Issue State' on state-based 'Commission Rates' (See F22008 under 'Commission Services'). 'Situs State' is currently informational only but may be used for reporting purposes.

Provider Services

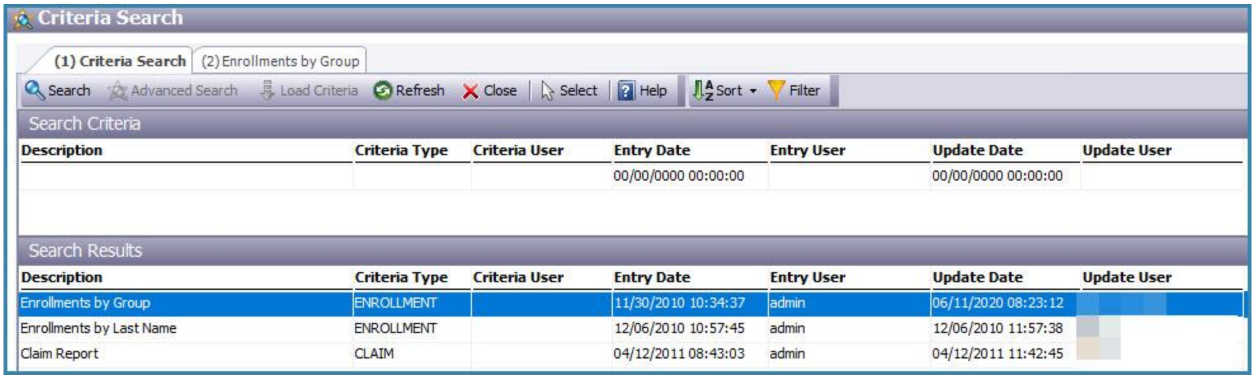
Increased Payee Field Lengths

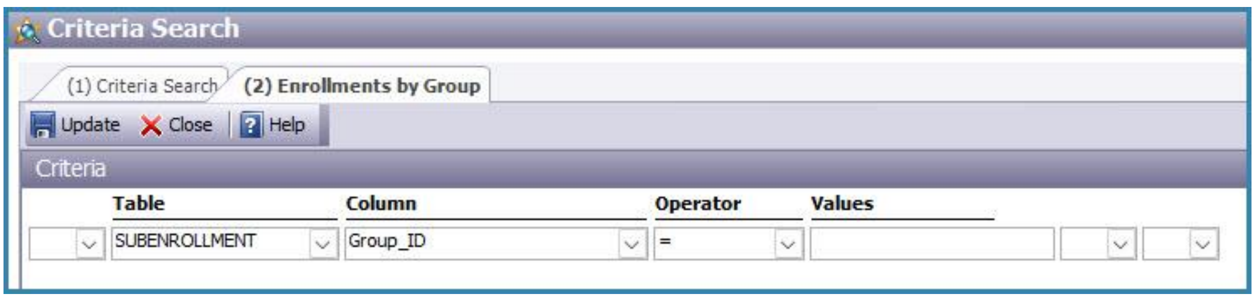
[F21017] The character limits for the 'Name' and 'Name for Check' fields for Payees have been increased from 50 to 128 characters.

System Services

Viewing Specific Criteria from Criteria List

[F7964] The 'Criteria List' within 'System Services' has been replaced with 'Criteria Search'. Here, Users may search for criteria through a variety of columns. When a criteria is selected, the 'Criteria Update' screen opens and allows full modification of the criteria set. *Criteria sets cannot be saved as new - only updated.*





VBAGateway Services

Auth Number Hyperlink

[F22079] The 'Auth #' field within 'Request Details' is now a hyperlink that will navigate to the associated Auth.

New Security Objects

Here are the new security objects for this release:

Security Object	Object Location	Related Feature
u_state_update	State Configuration	F22023
u_criteria_search	Criteria Search	F7964
u_criteria_services_area	Criteria Search	F7964
u_criteria_update	Criteria Search	F7964