



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).

The screenshot shows the 'Plan Pre-Ex' window with a table containing two sections. The second section, 'Disclosed on Application', is highlighted with an orange border. The table has the following structure:

					Disclosed on Application			
Coverage Type	From	Thru	Range Type	Amount Ex Code	From	Thru	Range Type	Amount Ex Code
	0	0		.00	0	0		.00

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).

The screenshot shows the 'Pre-Ex Allow Diagnosis' window for member 'Denji Hayakawa (01)'. The 'Pre-Ex Disclosed on Application' tab is active and highlighted with an orange border. The table below shows the following data:

Diag. Group	From Diag.	Thru Diag.	Diag. Type
			ICD-10

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.

The screenshot shows the 'Financial Settings' form. The 'Pay Period Start Date' is highlighted with a yellow box and set to 01/03/2023. Other visible fields include: Primary Bank Account, Cap. Enroll by Day (1), Cap. Enroll through Day (31), Comm. Enroll by Day (1), Comm. Enroll through Day (31), Inv. Enroll by Day (1), Inv. Enroll through Day (1), Premium Proration (checked), Payment Proration (checked), Inv. Pay To (VBA QA), Address (PO Box 2222), City/State/Zip (Milwaukee, WI, 53444), Phone Number ((888) 777-3333), Distributions on Invoices After (08/01/2014), Full Backout on Void Distribution (checked), ASO Percentage, Invoice Wire Bank Account, Default Currency (U.S. Dollars (USD)), Use Currency (checked), Set Paid Through, and Generating Invoices.

★ 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.

The screenshot shows the 'Rate Definition' form. The 'Override Enrolled Dates' checkbox is highlighted with a yellow box and is checked. Other visible fields include: Rate ID (DENTAL RATE), Category (Dental Premium), Basis (Tier Basis), Rate Key (157), Desc. (Dental), View Payee(s) button, Enrollment Settings (Eff. Date: 01/01/2010, Term. Date: 05/31/2011, Plan, Plan Type, Tier, Benefit, Network, Net. Type, Enroll Count, Count By, Enroll Duration, Duration From, Duration Min, Auto-Adjust), Demographic Settings (Age Type, Age Range, Adult/Child, Smoker, Gender, Relationship, Add. Type, State, City, County, Zip Range, Country), Rate Settings (Rate Type: Per Employee, Pace, Rate: 8.9900, Max: .00, Var. 1: .0000, Var. 2: .0000, Var. 3: .0000, EE/DP, Rounding), Additional Invoice (B), Send To (Primary), Frequency (M), Premium Proration (checked), and Avoid Retro (unchecked).

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				
Search Criteria				
Billing Cycle	Description	Frequency	Type	Factor
		0		.000000
Search Results				
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 Rate Detail

Rate Type: Applied Rate

Description: Per Employee Billed Monthly

Category: **Rate ID:** PEB_6

Eff. Date: 01/01/2011 **Payor:** ABC Electric Company

Term. Date: 00/00/0000 **Account:** Checking Acct. 1

Group: GroupSample - Sample Group Build **Issue State:**

Division: **Issue Age Range:** to

Plan: **Use Initial Premium:**

Plan Type:

Prem. Rate: **Pre-Payment:**

No Subscribers Selected ...

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 Rates

(1) Rate Search (2) Adding Commission Rate

Update Copy Close Help First Previous List Next Last

Commission Rate Detail

Rate Type: Applied Rate

Description:

Category: Rate ID:

Eff. Date: 00/00/0000 Payor:

Term. Date: 00/00/0000 Account:

Group: Issue State:

Division: Issue Age Range: to

Plan: Use Initial Premium:

Plan Type:

Prem. Rate: Pre-Payment:

No Subscribers Selected ...

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.

, Pre-Payment: . The 'Issue State' field is highlighted with an orange box."/>

Commission Rate Detail

Rate Type: Applied Rate

Description: Per Employee Billed Monthly

Category: Rate ID: PEB_6

Eff. Date: 01/01/2011 Payor: ABC Electric Company

Term. Date: 00/00/0000 Account: Checking Acct. 1

Group: GroupSample - Sample Group Build Issue State:

Division: Issue Age Range: to

Plan: Use Initial Premium:

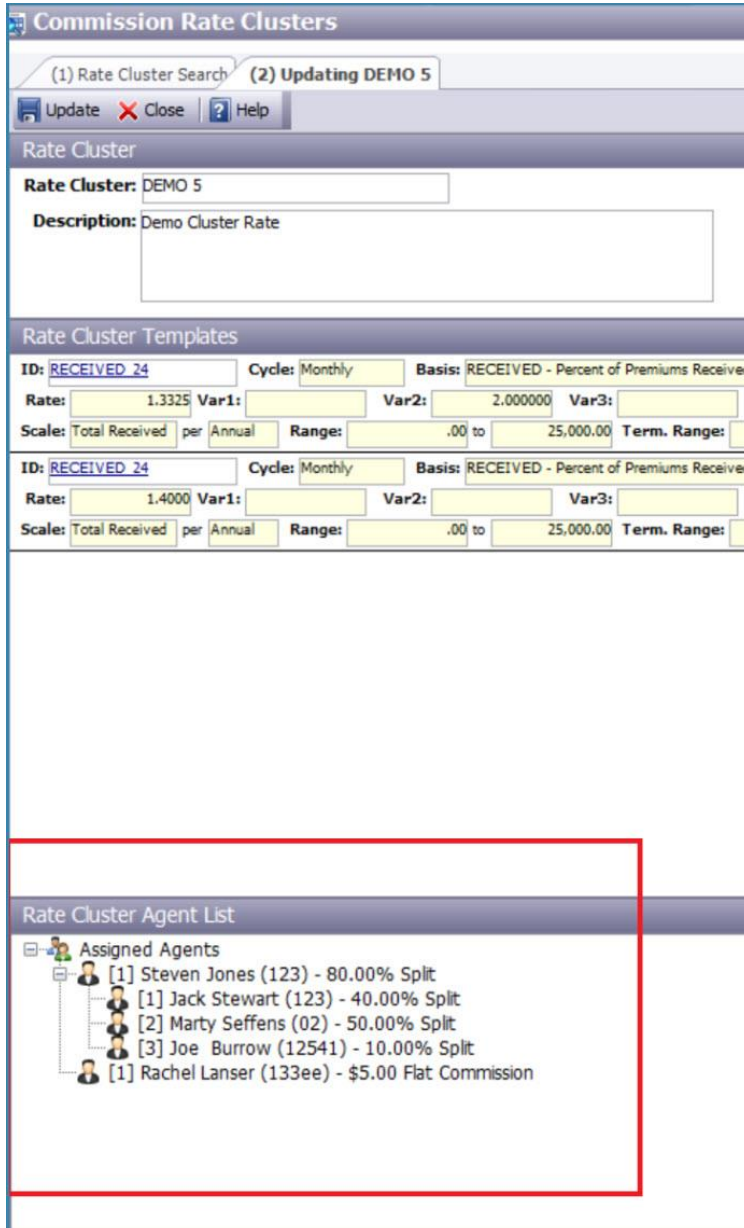
Plan Type:

Prem. Rate: Pre-Payment:

No Subscribers Selected ...

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.



Commission Rate Clusters

(1) Rate Cluster Search (2) Updating DEMO 5

Update Close Help

Rate Cluster

Rate Cluster: DEMO 5

Description: Demo Cluster Rate

Rate Cluster Templates

ID: RECEIVED_24 Cycle: Monthly Basis: RECEIVED - Percent of Premiums Received

Rate: 1.3325 Var1: Var2: 2.000000 Var3:

Scale: Total Received per Annual Range: .00 to 25,000.00 Term. Range:

ID: RECEIVED_24 Cycle: Monthly Basis: RECEIVED - Percent of Premiums Received

Rate: 1.4000 Var1: Var2: Var3:

Scale: Total Received per Annual Range: .00 to 25,000.00 Term. Range:

Rate Cluster Agent List

- Assigned Agents
 - [1] Steven Jones (123) - 80.00% Split
 - [1] Jack Stewart (123) - 40.00% Split
 - [2] Marty Seffens (02) - 50.00% Split
 - [3] Joe Burrow (12541) - 10.00% Split
 - [1] Rachel Lanser (133ee) - \$5.00 Flat Commission

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'.

The screenshot displays the 'Enrollment Management' application window. At the top, there are menu options: 'Update', 'Close', and 'Help'. Below this is a toolbar with 'Add Enrollment', 'Modify Enrollment', and 'Division Transfer' buttons. The main area is divided into two sections: 'Subenrollment List' and 'Enrollment Detail'.

Subenrollment List:

Group ID	Division	Contract Start	Contract End	Start Date	End Date	Member	Invalid
PSO	SD01 - Special Division 4	12/01/2020	12/31/2099	01/02/2022	12/31/2090	<input type="checkbox"/>	<input type="checkbox"/>

Enrollment Detail:

Policy Number:
 Life Max: .00
 Ann. Max: .00
 Orig. Enroll Date: 00/00/0000
 Elig. Date: 00/00/0000
 Date Employed: 01/02/2022
 Term. Date: 00/00/0000
 Paid Through: 00/00/0000
 Entry Date: 09/13/2022 15:07:36
 Entry User: VBA_nhinton
 Update Date: 10/17/2022 14:10:43
 Update User: VBA_nhinton

Enrollment Plan:

Use Scale	Volume	Paid Through	Term Reason	Writing Agent
Family	<input type="checkbox"/>	.00	00/00/0000	
Family	<input type="checkbox"/>	.00	00/00/0000	
Family	<input type="checkbox"/>	.00	00/00/0000	
Family	<input type="checkbox"/>	.00	00/00/0000	

Enrollment Rider:

Benefit Code	From Date	Thru Date	Init. Volume	Sal. Pct.	Use GI	Use Scale	Volume	EE Cont

At the bottom, there are tabs for 'Subscriber Enrollment' and 'Member Enrollment'.

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'.

The screenshot shows the 'Commission Reps' application window. The title bar reads 'Commission Reps'. Below the title bar, there are two tabs: '(1) Representative Search' and '(2) Updating Rachel Lanser (1)'. A menu bar includes 'Update', 'Close', 'Email', 'Help', 'First', 'Previous', 'List', 'Next', and 'Last'. The main content area is divided into two sections: 'Representative Detail' and 'Writing Agent'.

Representative Detail

First Name: Rachel Last Name: Lanser
 Mid. Name: SSN: 321-32-1654
 Rep. Type: Group Rep
 Address: W180 N11711 River Lane
 City: Germantown
 State/Zip: WI (Wisconsin) 53074
 Country:
 Phone: (262) 946-1200 Ext.:
 Fax: (262) 946-1201
 EMail: rlanser@vbasoftware.com
 EMail Statement:

Writing Agent

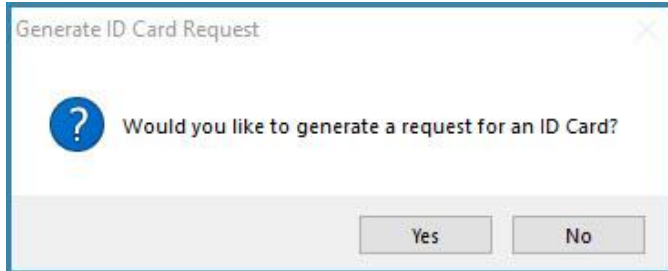
Sub. ID	First Name	Last Name	Issue State

At the bottom of the window, there is a navigation bar with the following tabs: Licenses/Appointments, Accounts, **Writing Agent**, Check History, Rate List, VBAGateway Groups, and VBAGateway Subscribers.

Enrollment Services

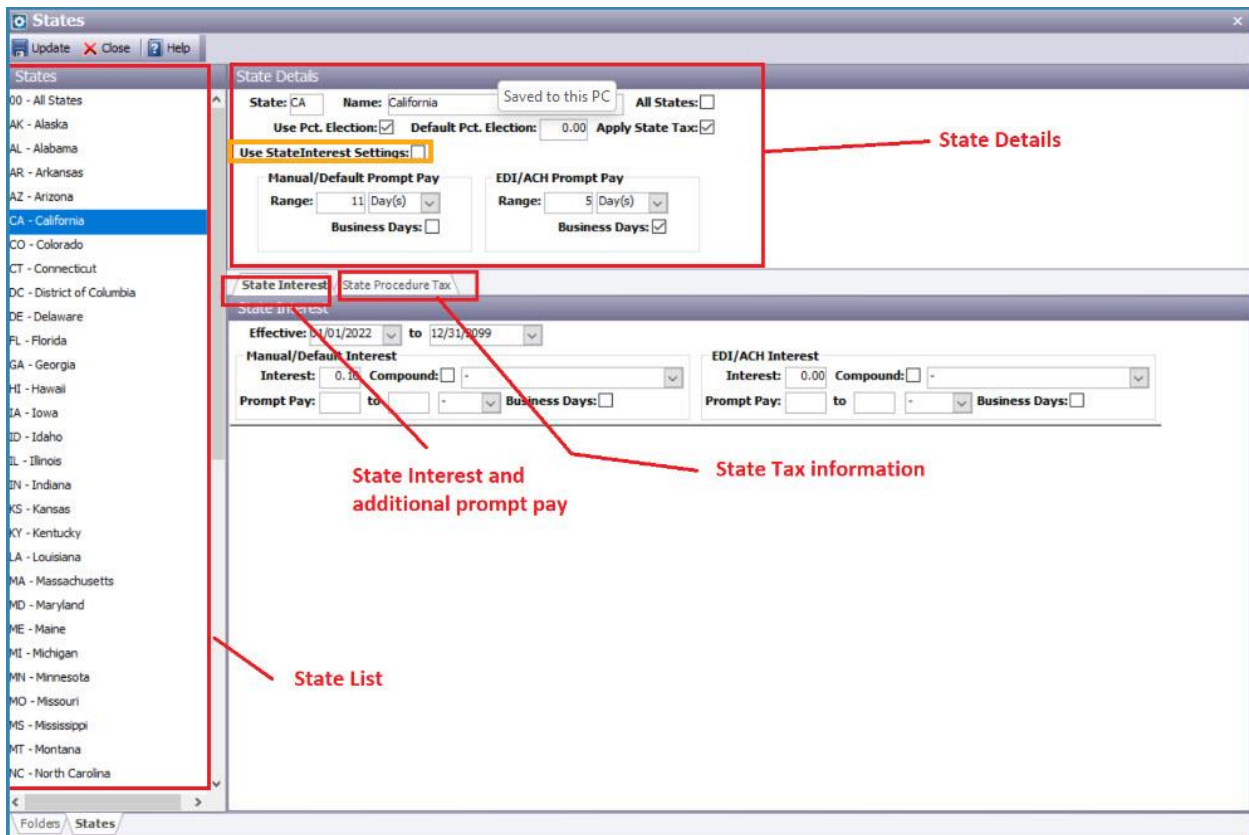
ID Card Automated Prompt

[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.

The screenshot shows the 'Additional/COBRA Settings' window. The 'Group Bill Cycle Payment Methods' section is highlighted with an orange border. It contains a table with the following data:

Division	Bill Cycle	Payment Method
[Dropdown]	[Dropdown]	[Dropdown]

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'.

The screenshot shows the 'Payment Method' window. It contains a table with the following data:

Payment Method	Plan ID	Benefit Code	Effective Date	Term Date	ACH Pull Day
Testing Debit Cards	NHTEST2022	[Dropdown]	01/01/2022	12/31/2022	[Dropdown]

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.

Subscriber Information

Subscriber ID: 106537811 Disenrolled: 00/00/0000

First: Denji MI: Last: Hayakawa Sfx: Address: 127 Chainsaw Avenue

Address2: City/State/Zip: st ignace MI (Michigan) 78484

County: Country: Home/Work #: 1 (111) 111-1113 1 (111) 111-1133

Issue State: EMail: denji@pso.com Apply Ex Code: Ind. Bill Cycle: ACH: Pay Prd.: Paid Thru: 00/00/0000 Auto-Create:

Group/Division ACH Pull Days

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

Additional/COBRA Settings

Additional Group Settings

Sec. 111 Employer Size: Admin. COBRA: Election Range: 45 Days Renewal Date: 00/00/0000

Pay To Account: Billing Self-Admin: Enrollment Closed: Renewal Completion: 00/00/0000

Employer Account: Def. EOB Report: Def. Invoice Report: Def. Adj. Reason: Dist. Payor: Dist. Acct.: Producer: Acc. Manger:

Subscriber ID Prefix: Subscriber ID Suffix: Commission Lookback in Months: 0 Paperless?: Inv. Enroll by Day: Inv. Enroll through Day: Total Employees: Calc. Due Date on Bill: CoPay Max per Svc Date per Provider: Disable Duplicate Claim Check: Auth Not Reqd: Disable COBRA Auto Select:

RX Info. (Information Only)

Name: Contact: Phone: () - BIN: PCN: GRP:

Enrollment (Information Only)

Tot. Insured: 5 Tot. Member: 15 Curr. Insured: 5 Curr. Member: 14

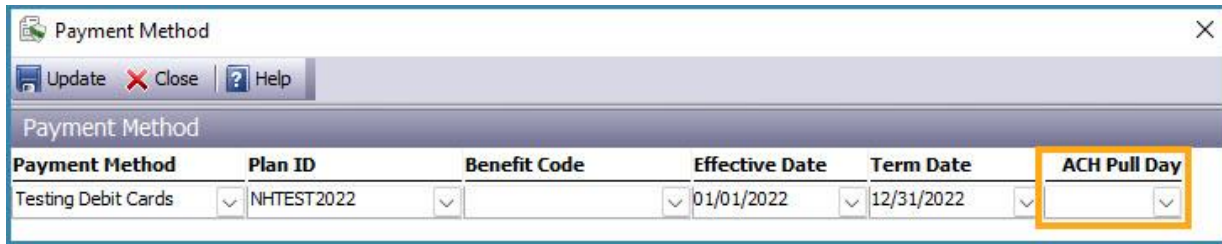
Division ID	Name	Disenrolled
SD01	Special Division 4	00/00/0000
SD02	Administration	00/00/0000
SD03	Devlis	00/00/0000
SD04	Private Sector	00/00/0000

ACH Pull Days

ACH Pull Day: 0

Division Settings / COBRA Mapping / VBA ID Settings / Admin Override / **ACH Pull Days** / Bill/Payment

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.*

The screenshot shows the 'Criteria Search' window with two tabs: '(1) Criteria Search' and '(2) Enrollments by Group'. The 'Criteria Search' tab is active, displaying a search criteria table and search results.

Description	Criteria Type	Criteria User	Entry Date	Entry User	Update Date	Update User
			00/00/0000 00:00:00		00/00/0000 00:00:00	

Description	Criteria Type	Criteria User	Entry Date	Entry User	Update Date	Update User
Enrollments by Group	ENROLLMENT		11/30/2010 10:34:37	admin	06/11/2020 08:23:12	
Enrollments by Last Name	ENROLLMENT		12/06/2010 10:57:45	admin	12/06/2010 11:57:38	
Claim Report	CLAIM		04/12/2011 08:43:03	admin	04/12/2011 11:42:45	

The screenshot shows the 'Criteria Update' window with two tabs: '(1) Criteria Search' and '(2) Enrollments by Group'. The '(2) Enrollments by Group' tab is active, displaying a criteria configuration table.

Table	Column	Operator	Values
SUBENROLLMENT	Group_ID	=	

VBA Gateway 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