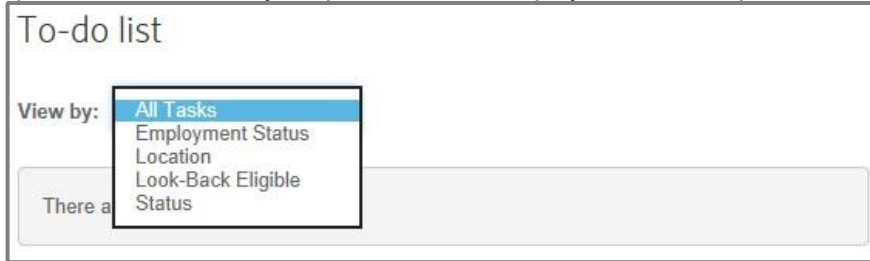


## Working with the To-do List

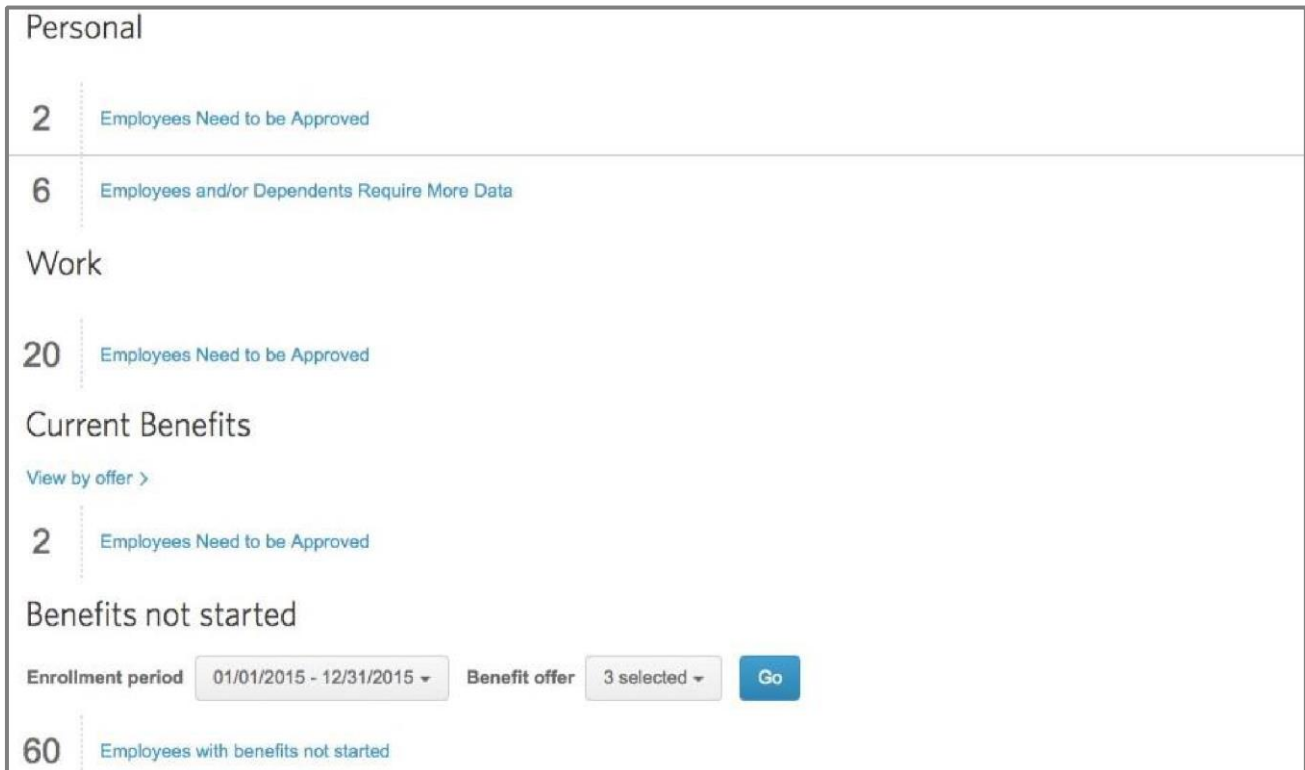
### Managing the To-Do List

Use the *To-Do List* to keep track of employee activity. You can filter the categories of employees that display in your *To-Do List*. *Note:* For very large employer groups, no tasks will display by default. You will need to select an option from the *View by* drop-down box to display all tasks or specific categories of employees.



The *To-Do List* has different types of data related to your employees, such as items that need to be approved, incomplete information and benefit elections that have not been started. These items are separated into sections (including current benefits, open enrollment benefits, work related information, personal data and so on). The number in front of each link indicates how many employees need attention. When you select a link, you are taken to the list of associated employees for that item.

**See the *Task Resolution Guide* on the following pages for task definitions and the steps to resolve them.**



Task	Task Definition	Task Resolution
<b>Cancel Cobra</b>	The Cobra benefits are coming to an end and are needing to be manually cancelled	Navigate to Manage Employee 1. Select mange Cobra 2. Select edit policy 3. Select cancel benefits for all 4. Select the reason for cancellation -Yes you wish to continue with change -Decline cobra coverage 5. Enter in end date of coverage then Save
<b>Not eligible for benefits</b>	The member may not be eligible based off of category member is enrolled under	Check the members category to insure that it is selected and the member should be eligible under the saved category.
<b>Member not eligible for the bundle of benefits based on their categories</b>	According to the employee category elected, the member is not eligible for the bundle of benefits	Click start to enroll member
<b>Work/Personal related task</b>	An update is needed on member's profile	See task message and update employee profile with missing information.
<b>Invalid age for covered dependent</b>	Based on age validation rules within the platform for this plan, the dependent is no longer eligible for coverage due to their age	1. Select Benefit Detail then Edit 2. Select change reason that applies for removing dependent 3. Cancel or update coverage for dependent (update coverage level if needed) 4. Save

## Working with the To-do List

<b>Sections requiring approval</b>	Change has been made that require approval before the changes will send to the carrier	Approve the changes by clicking on the approve button
<b>Start or Decline Funding Products</b>	A contribution amount is required to be entered each plan year.	<ol style="list-style-type: none"> <li>1. Select or Decline FSA or DCFSA product</li> <li>2. If selected, enter contribution amount</li> </ol>

Most tasks can be resolved with the system but there are a handful that require a system override. These system override tasks will need to be cleared by a customer service rep at Benefitfocus before enrollment can be completed.

<b>Task</b>	<b>Task Definition</b>
<b>Pending carrier approval</b>	This task requires an approval from Premera. Contact your M&B Analyst to have the approval processed.
<b>Carrier identifier cannot be calculated</b>	There is a carrier number configuration on the backend that is not recognizing the correct carrier number. This task will prevent EDI from sending and will need to be cleared. Check with your M&B Analyst to confirm the set up is correct before calling Benefitfocus.

## Working with the To-do List

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<b>Effective date outside of plan contract dates</b>	Changes were made in the wrong participation period.
<b>Missing effective date</b>	An incorrect effective date that will need to be corrected by Benefitfocus.