My NTCA Benefits

Member Reference Guide

NTCA BENEFITS
THE RURAL BROADBAND ASSOCIATION

August 2022

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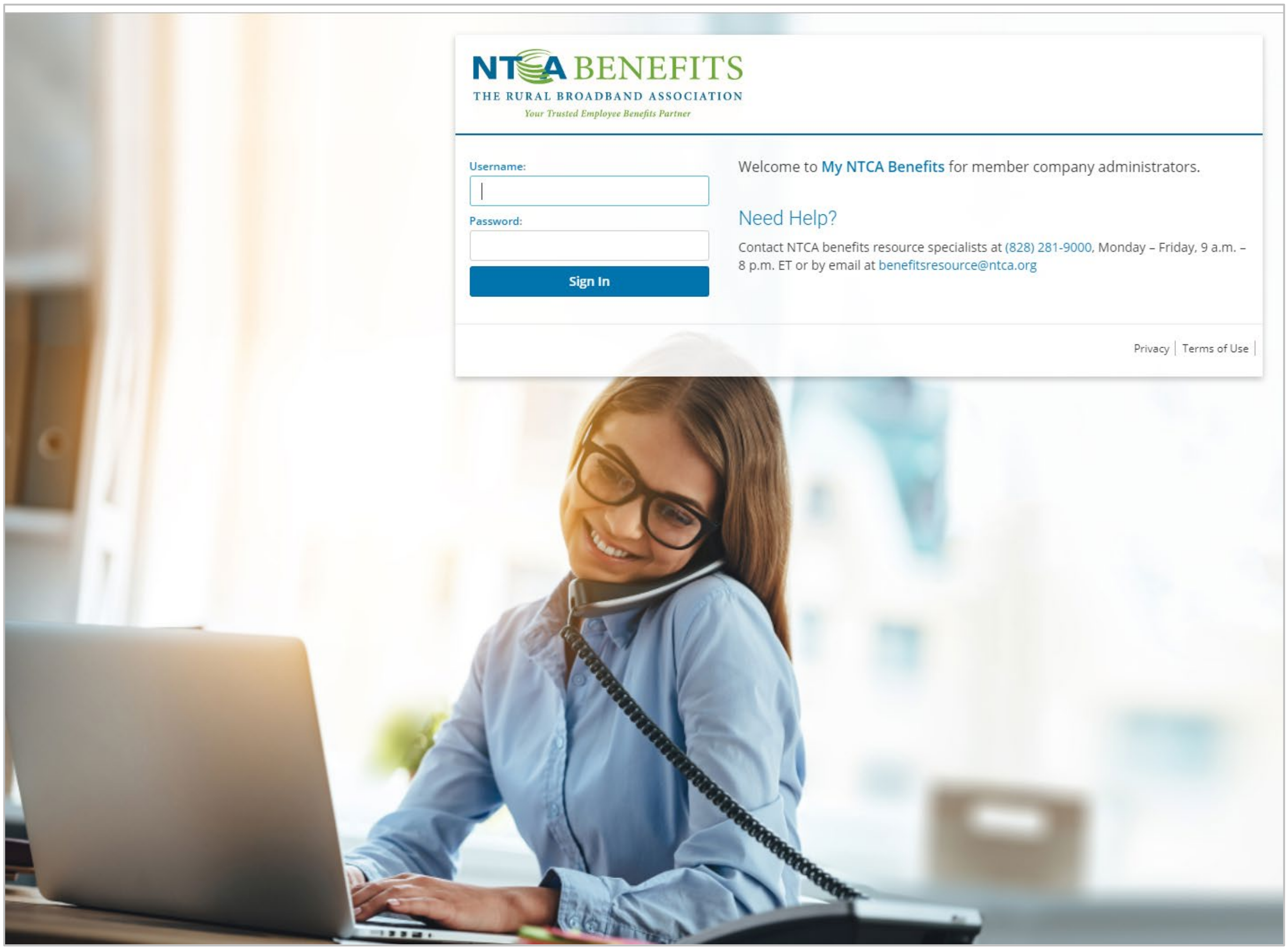
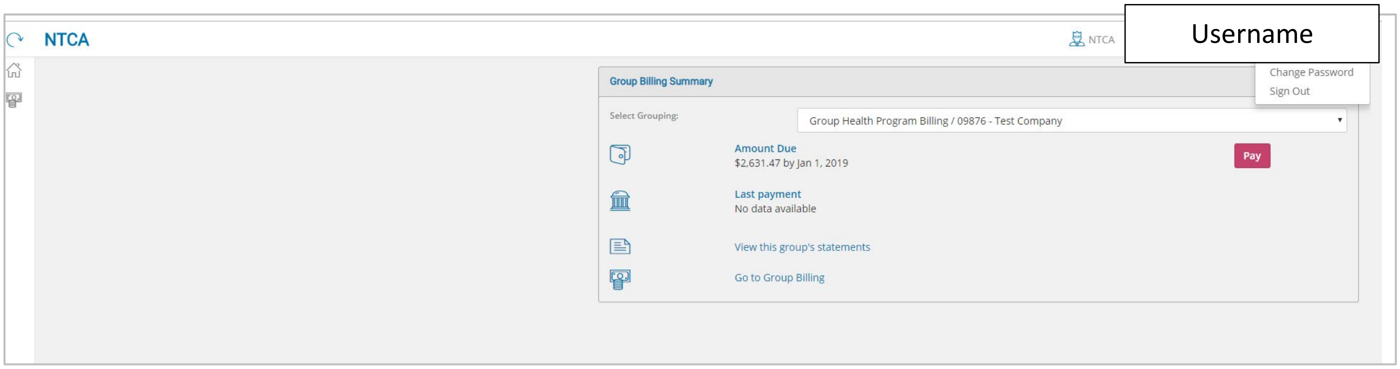
Login and Password Maintenance

My NTCA Benefits Portal URL:

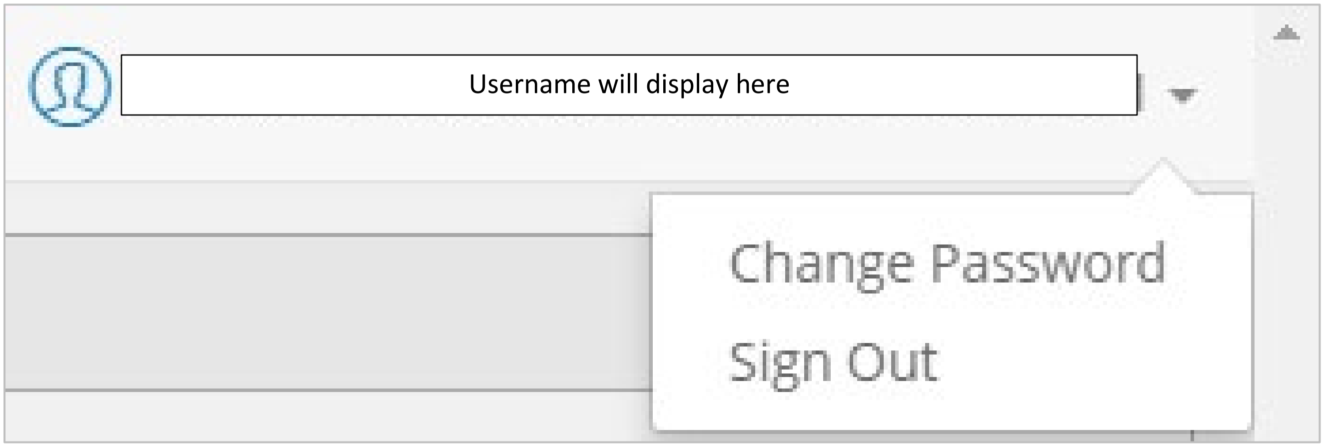
https://ntcabenefits-admin.ntca.org



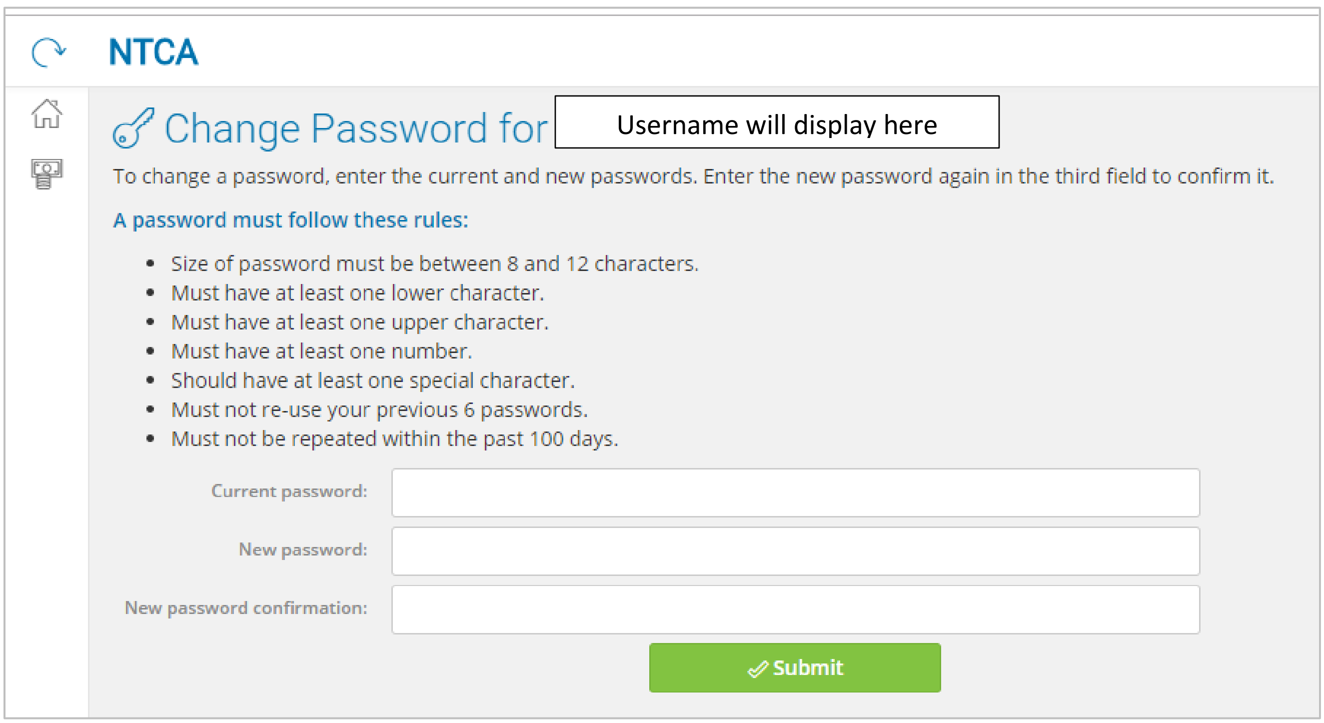
Log into *My NTCA Benefits* using your assigned username and password. The home page will present after successful login.



Password maintenance can be performed using the down arrow beside your username in the top right corner of this screen. Select "Change Password."



The "Change Password" screen provides self-service access to change your password. Password maintenance rules are displayed on the screen.



Press "Submit" to change your password. You will return to the login screen to input your username and new password.

Group Billing Summary

The home page shows the “Group Billing Summary” panel.

Information on this screen includes:

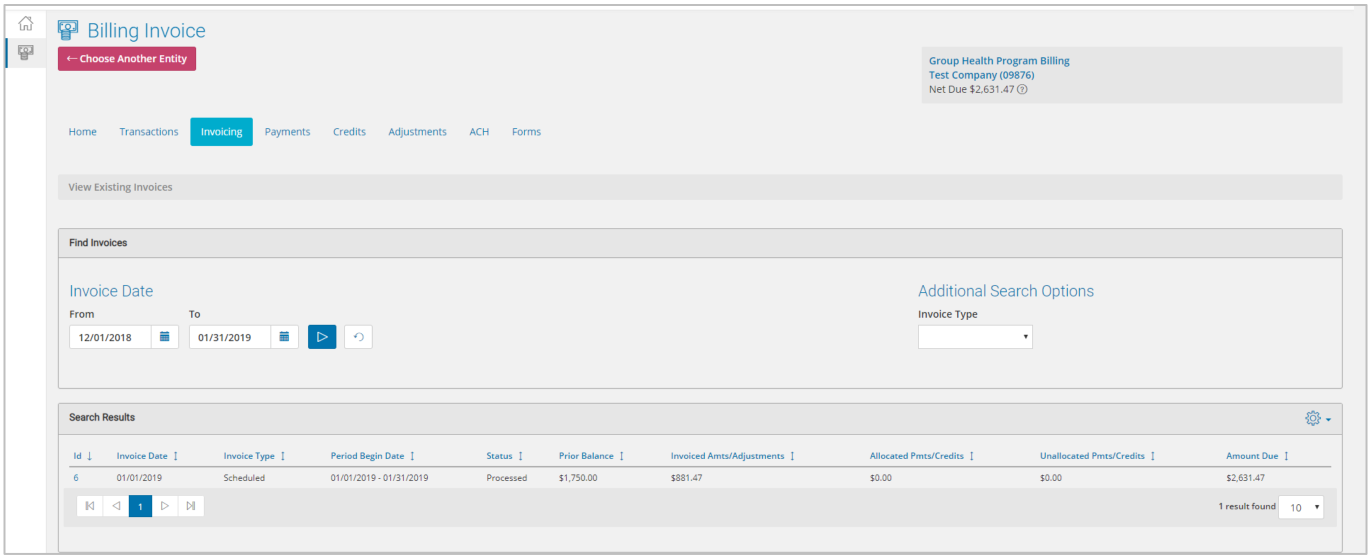
Pay
Use this button for quick access to the One Time Electronic Payment screen. Refer to the “Billing ACH” section.

Select Grouping
Using this drop-down field, you can select the benefit plan billing for the specific companies you have rights to access in your member company role. Click the down arrow to see your options.

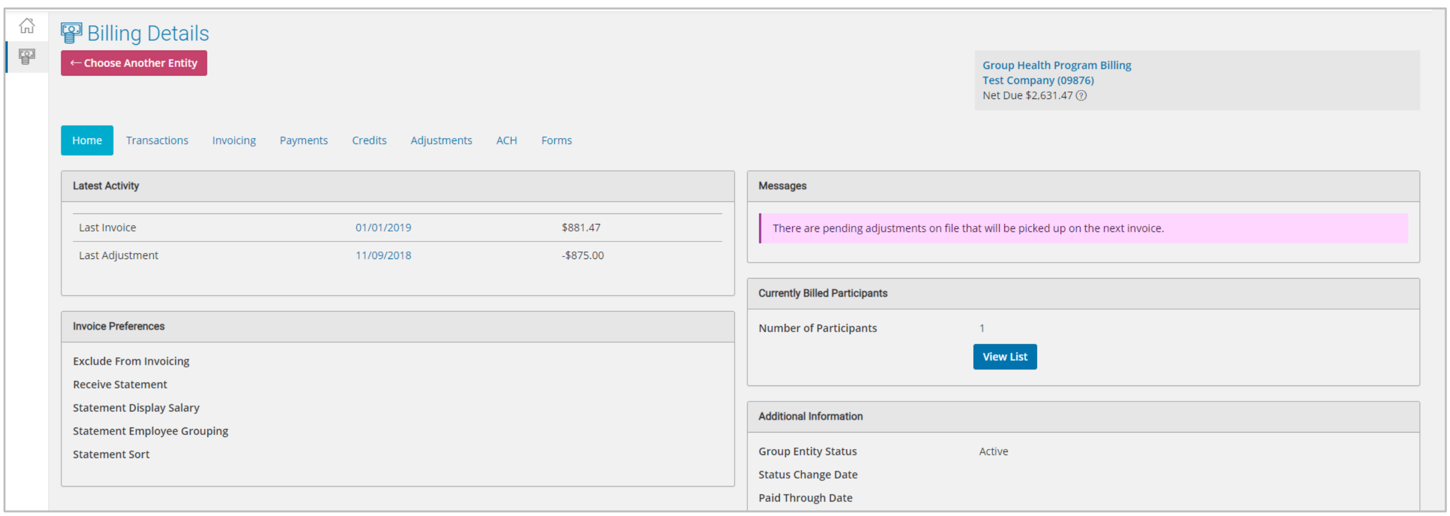
Amount Due
This shows you the amount due for the billing and company selected, and the due date for payment.
Note: If automatic recurring payment is set up, you will not see the amount due and due date but instead you will see the words “**Automatic Payment is setup.”**

Last Payment:
This shows you the last payment made for the selected billing grouping.

View this group’s statements:
This link will take you to the “Invoicing” tab and show the “Billing Invoice” screen. Refer to the “Billing Invoice” section.

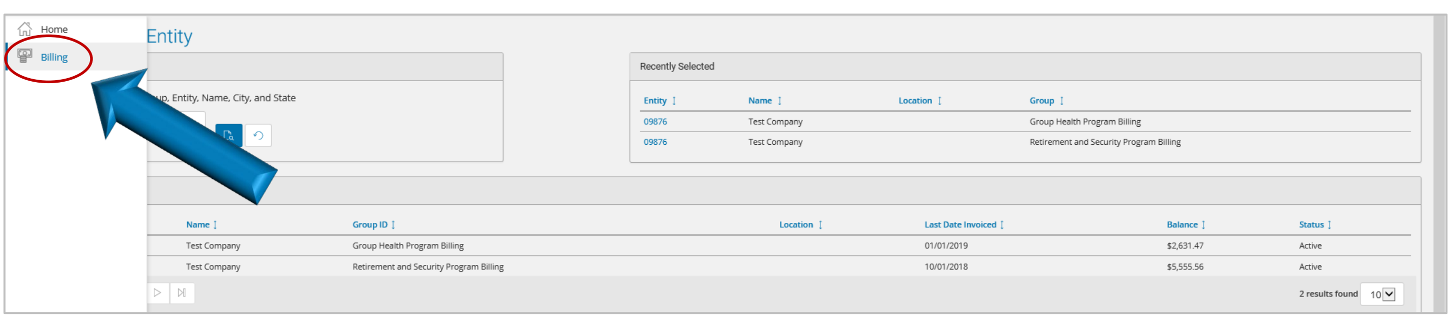


<u>Go to Group Billing:</u>
This link will take you to the "Billing Details" screen for the selected billing grouping. You can see the latest invoice activity and pending billing adjustments. Refer to the "<u>Billing Details</u>" section.

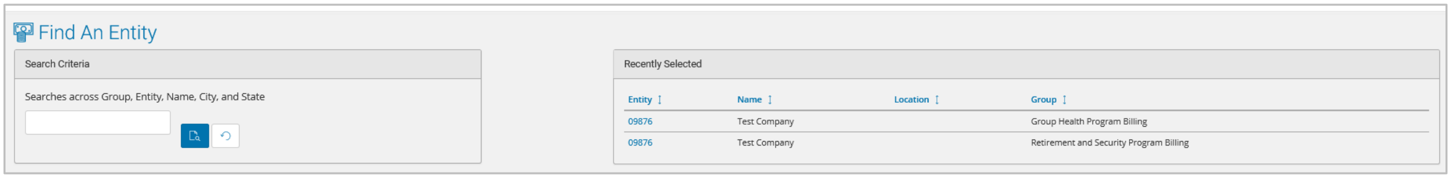


Entity Search

From the home page, select the Billing icon from the navigation bar found on the left side of the screen.



The “Find An Entity” screen will be presented.

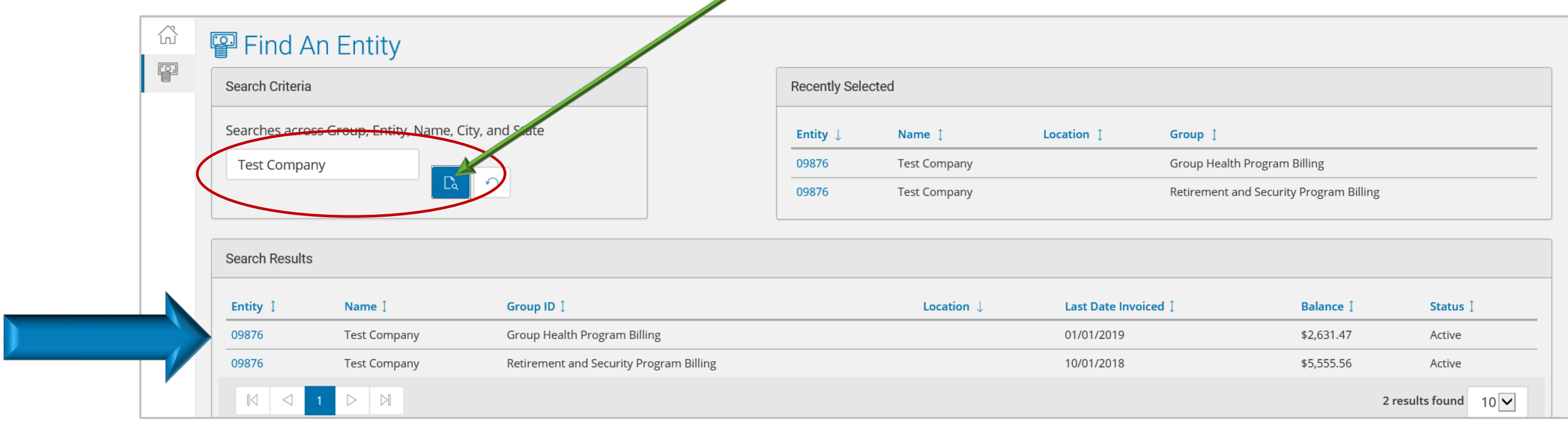


Using “Search Criteria”, you can search by:

- Group – this refers to the billing group. Options include:
    - Group Health Program
    - Retirement and Security Program
    - Member Section 125
    - Member Section 105

  and are displayed to the company administrator based on benefit plans adopted by your member company.
- Entity – this is the company # assigned by NTCA.
- Name – this is the member company name recorded in the NTCA benefit plan records.
- City – this is the member company city location recorded in the NTCA benefit plan records.
- State – this is the member company state location recorded in the NTCA benefit plan records.

Input your desired search criteria in the search field, click the search button and the search results will appear. The following example shows the search results when a company name was keyed into the search criteria.

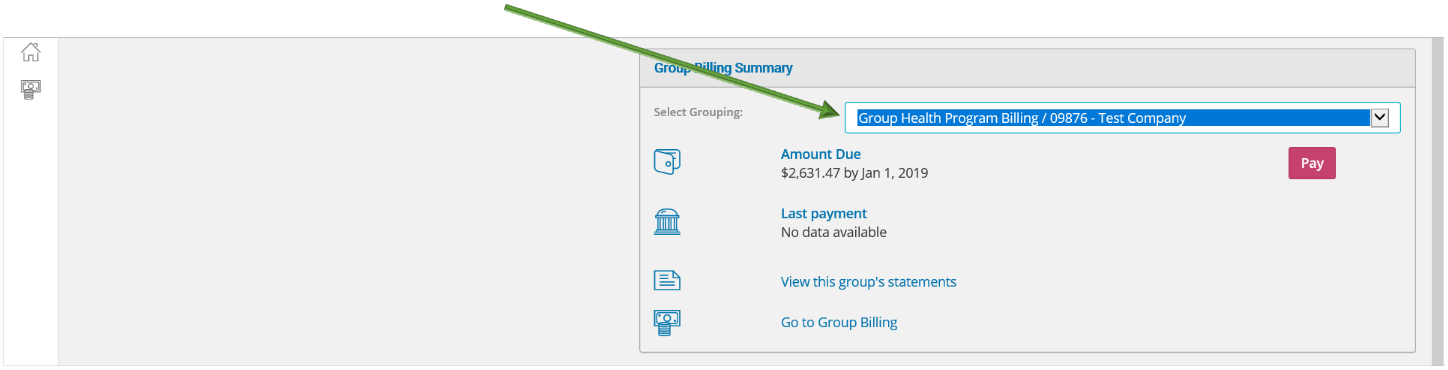


Click on the column headings in the Search Results panel to sort the results and display them in a different order. Use the dropdown arrow to select how many records will be presented on the screen. This feature may be particularly useful for company administrators that manage benefits for more than one company.

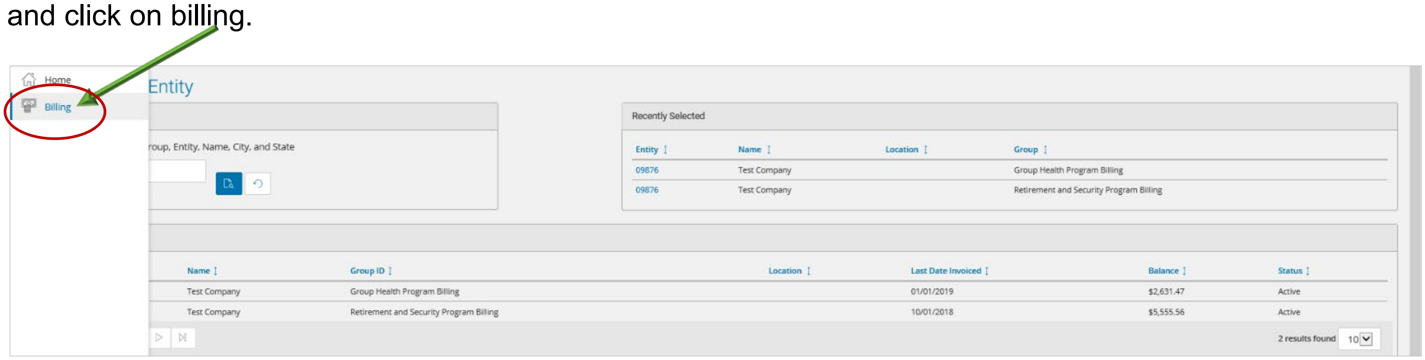
Billing Details

The “Billing Details” screen provides detailed information about a selected billing group. There are several ways to navigate to this screen.

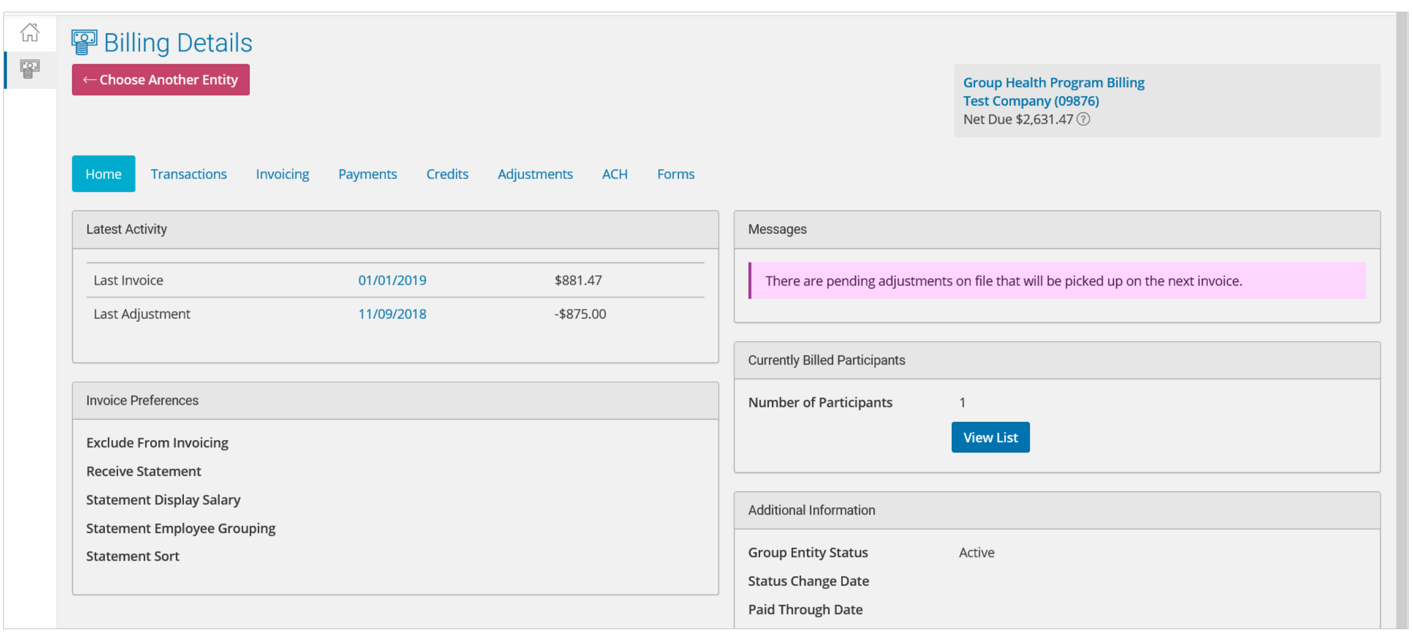
From the home page, select the billing group and click on “Go to Group Billing.”



Select the billing icon on the home page, input search criteria to display results for a company or billing group and click on billing.



The “Billing Details” screen will appear for the selected billing group. The following example shows the Group Health Program billing details for Test Company #09876.



This screen includes summary information about the selected benefit plan billing.

Latest Activity
You will see the last monthly invoice and any adjustments issued. If you click on the invoice date, it will take you to the "Billing Invoice" screen. Refer to "Billing Invoice" section.

Invoice Preferences
You will have options to customize how information is shown on your invoices. This includes options to include or exclude salary information; group billing data by participant type, such as employees, directors, retirees, and other options.

Messages:
When NTCA receives reported events or information from your company that initiates a billing adjustment, a message will display confirming we have processed the transaction. Refer to the "Billing Adjustments" section for more information.

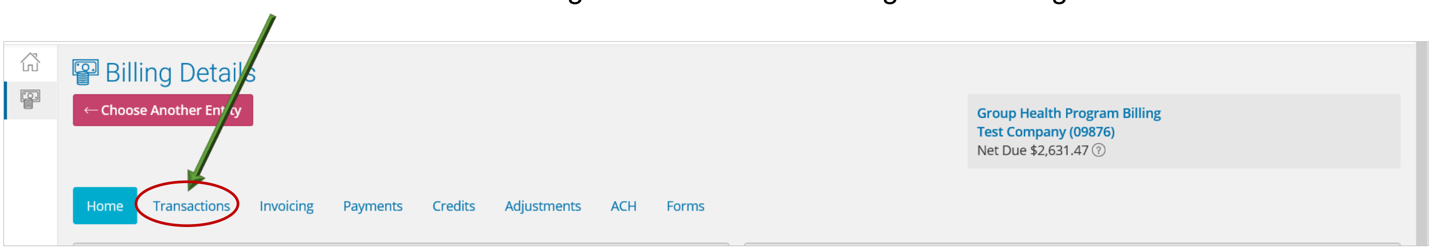
Currently Billed Participants:
You can see a quick summary of the # of participants included on the billing. Click "View List" to see their names, alternate ID#s and summary information about coverage effective and end dates.

Additional Information
This shows you basic information about your company status in the selected NTCA benefit plan and the current paid through date for the selected benefit billing group.

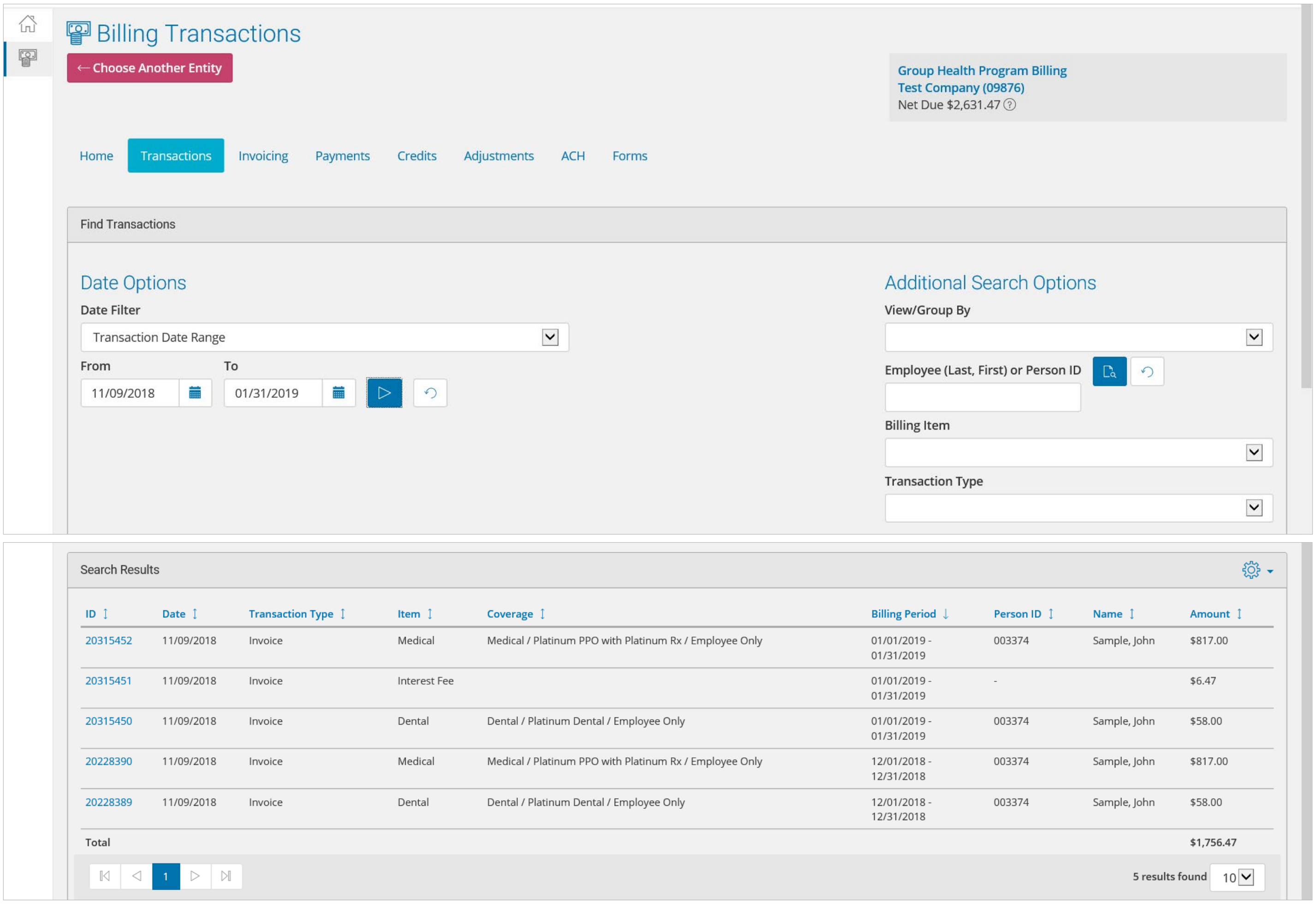
Billing Transactions

The "Billing Transactions" screen provides detailed information about billing transactions for a selected billing group.

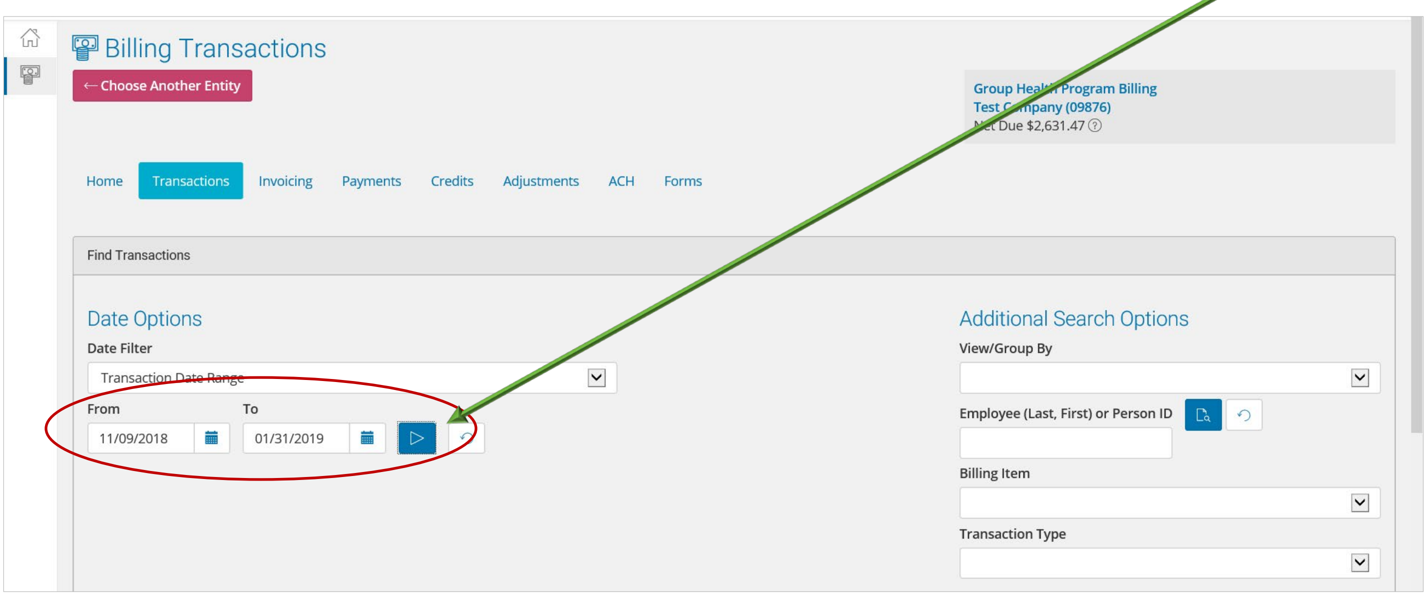
Click on the "Transactions" tab on the "Billing Details" screen to navigate to "Billing Transactions."

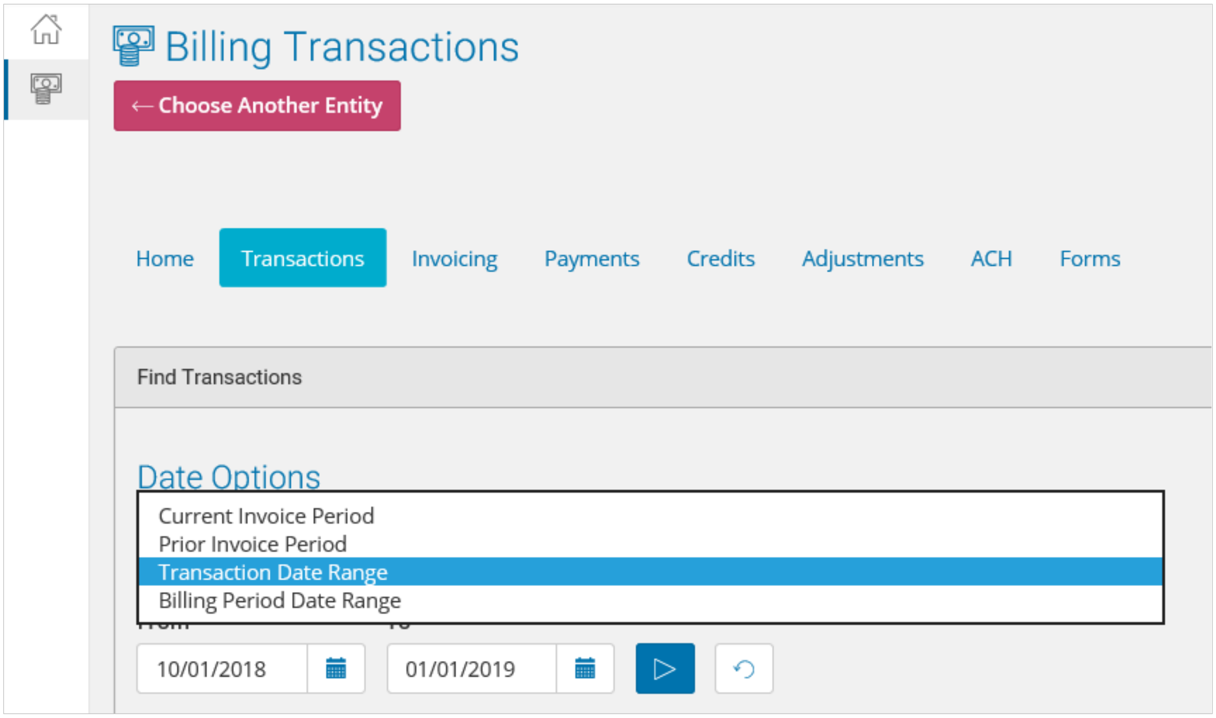


The following example shows the Group Health Program billing transactions for Test Company #09876.



You can easily find billing transactions using search criteria and filters on this screen. You can search by various date options by expanding the window in the “Date Filter” under “Date Options.” Click the blue arrow icon to apply the selected date range.



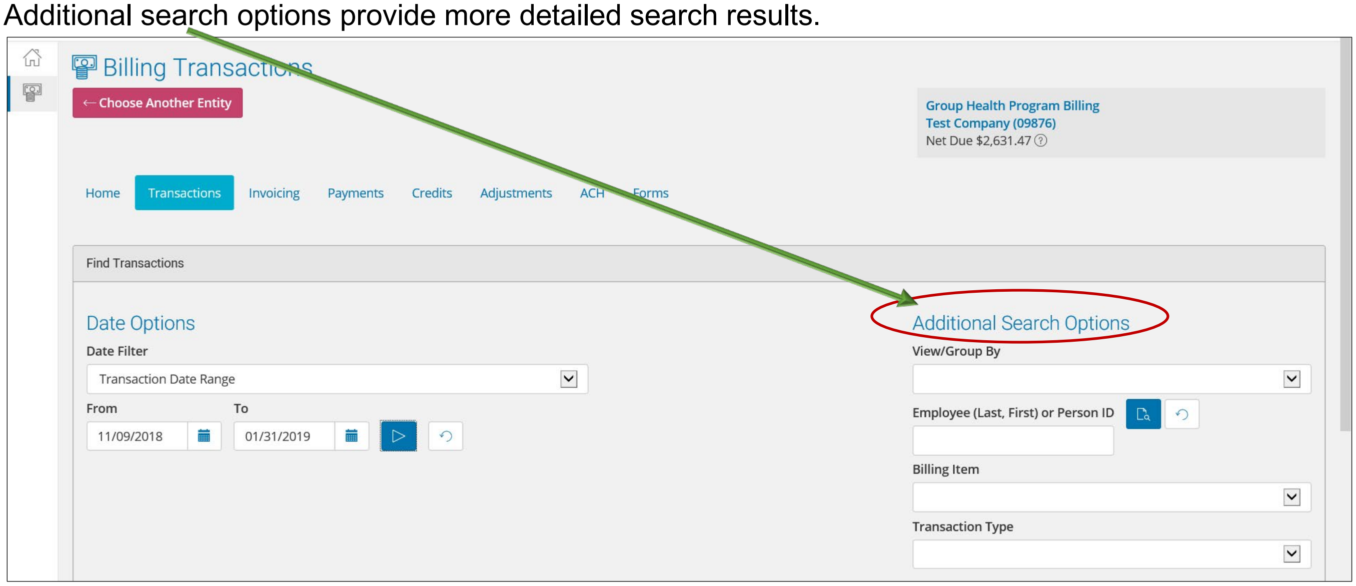


Date Options

You can search transactions by:

- Current Invoice Period – this shows all transactions included on the current monthly invoice.
- Prior Invoice Period – this shows all transactions included on past invoices.
- Transaction Date Range – this option allows you to input a specific date range to show only transactions processed by NTCA personnel in a specific period. Enter the first day of a month in the From field and the last day of a month in the To field.
- Billing Period Date Range – this option allows you to input a specific billing period to narrow the search criteria for transactions. Enter the first day of a month in the From field and the last day of a month in the To field.

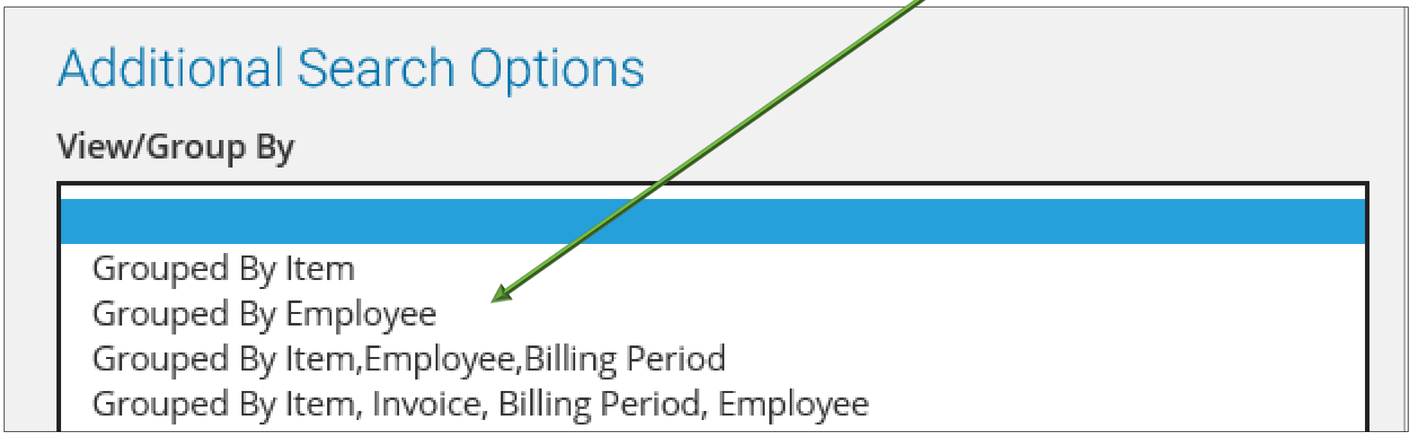
Additional search options provide more detailed search results.



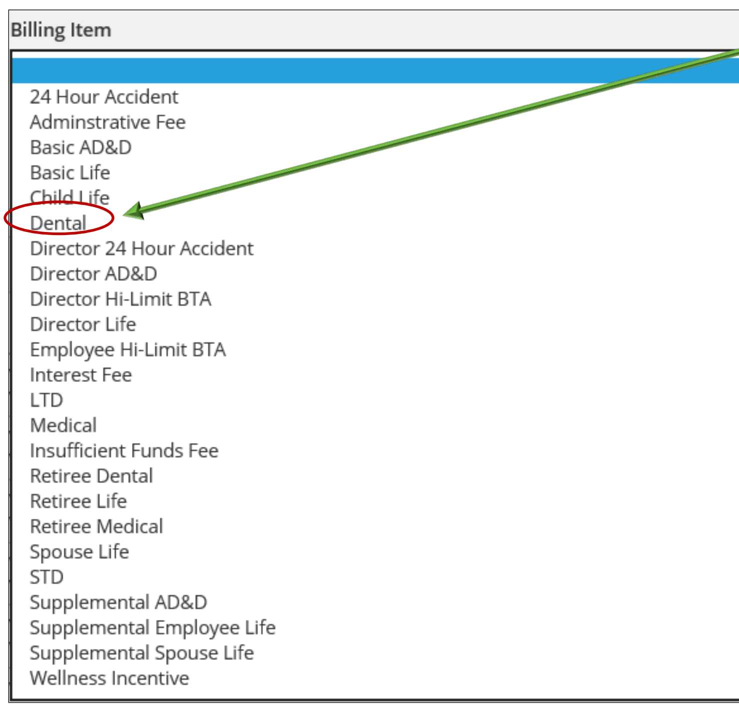
Additional Search Options

You can search transactions by:

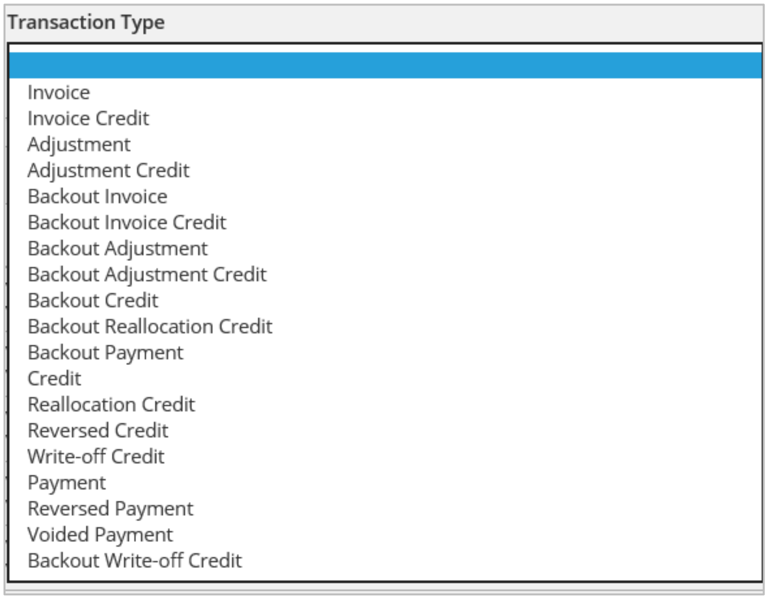
- View/Group By – allows you to group by specific selections when you expand the window.



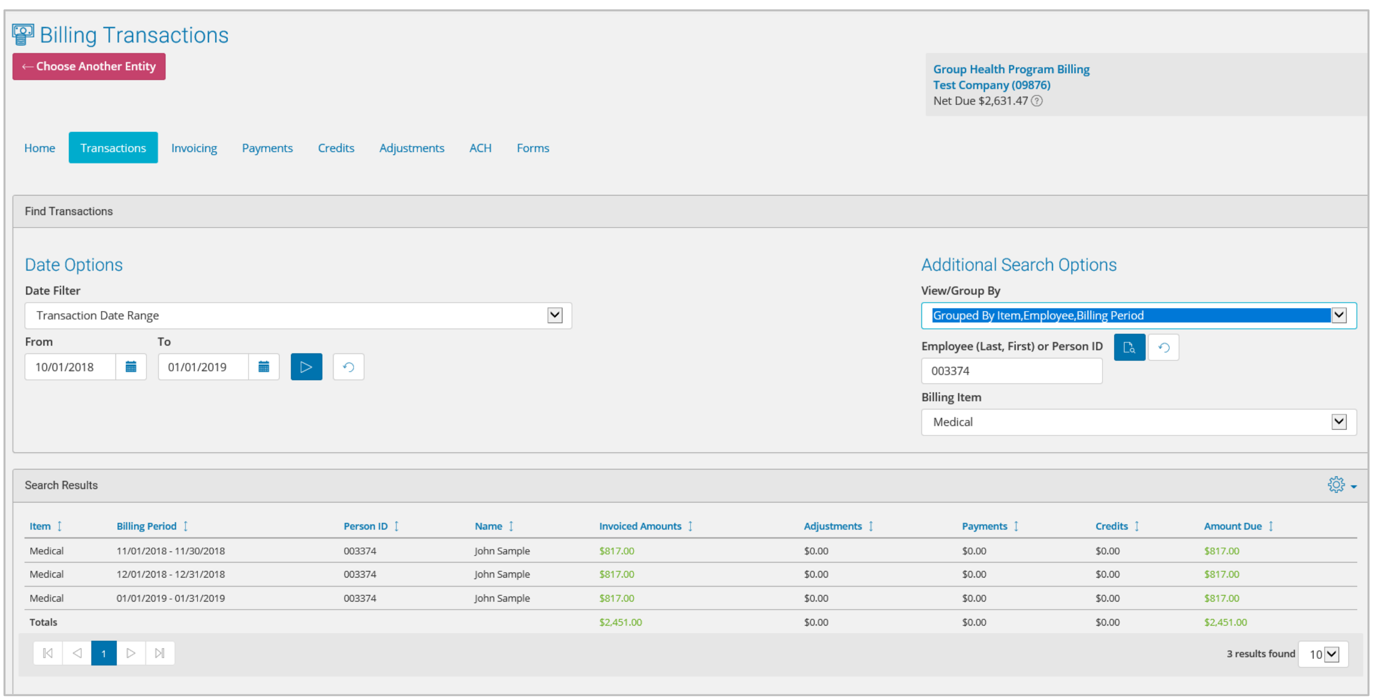
- Employee – you can input the name or alternate ID to retrieve billing transactions for a specific person.
- Billing Item – allows you to select a specific plan within the billing group. For example, you can search for transactions specific to the dental plan on your Group Health Program billing by selecting "Dental" from the dropdown list of options.



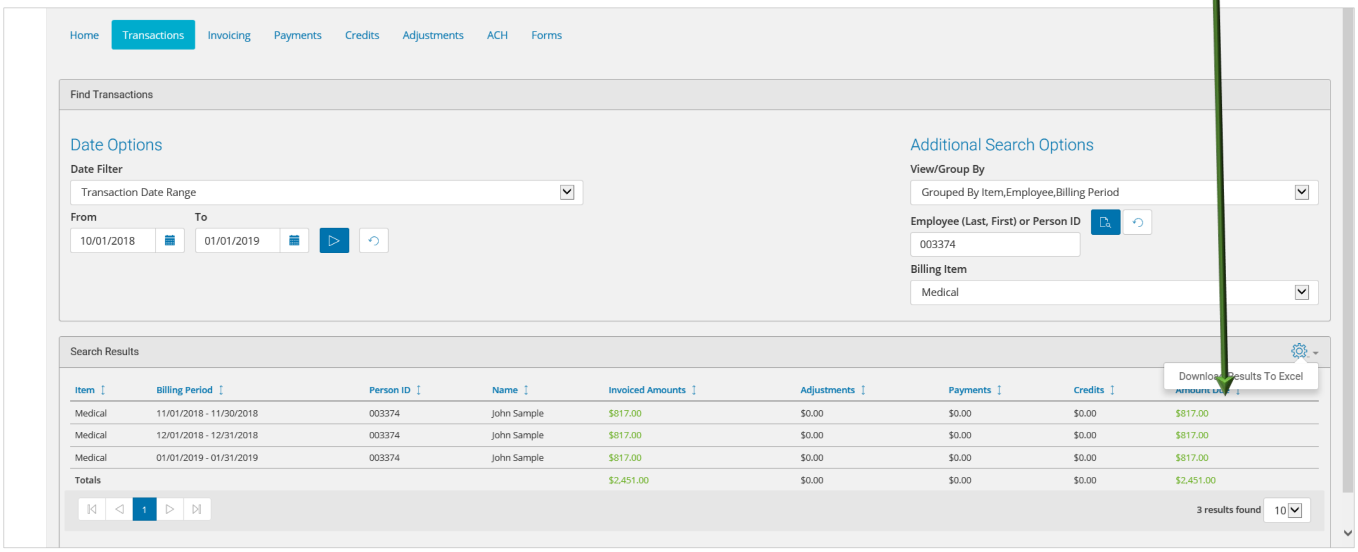
- Transaction Type – this option allows you to search for a specific type of transaction as shown on the following screen.



The search options can also be combined to further refine your search results. For example, you can search for a specific billing item for a specific employee. The following example shows search results for a specific employee and dental plan billing transactions.

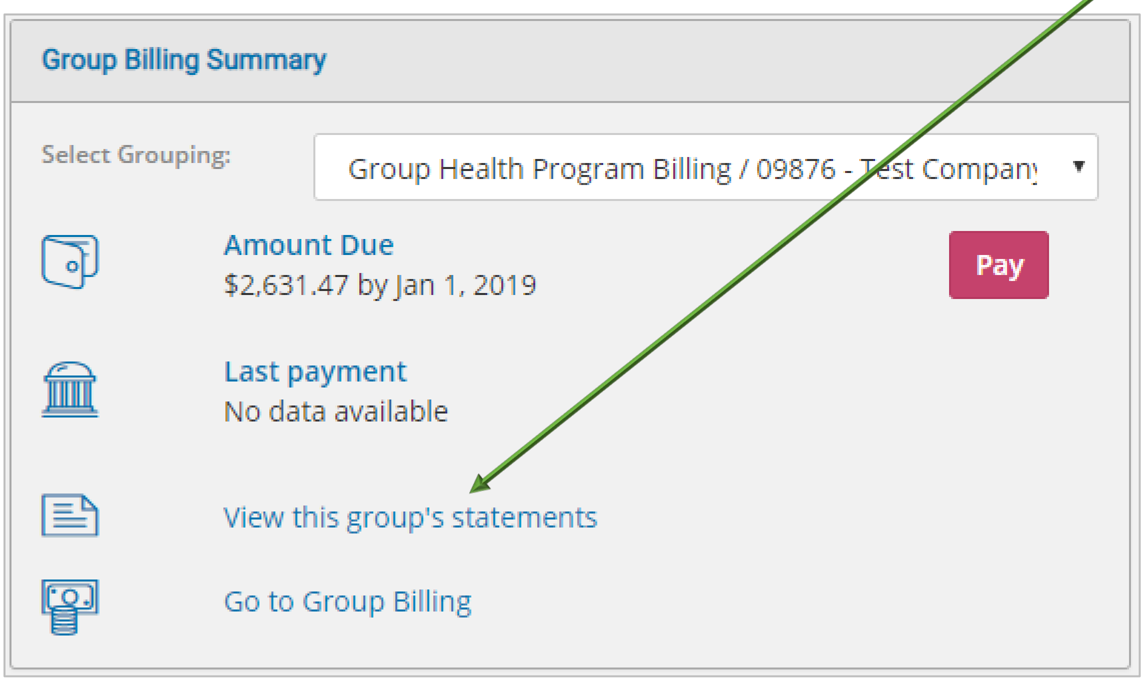


To download the search results to an Excel file, click the gear icon and select “Download Results to Excel.” The Excel file will open in a separate window.

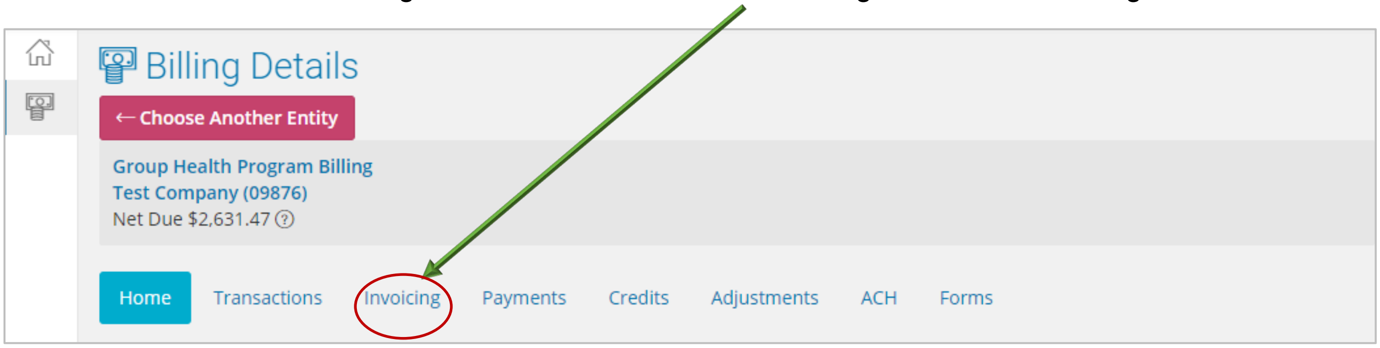


Billing Invoice

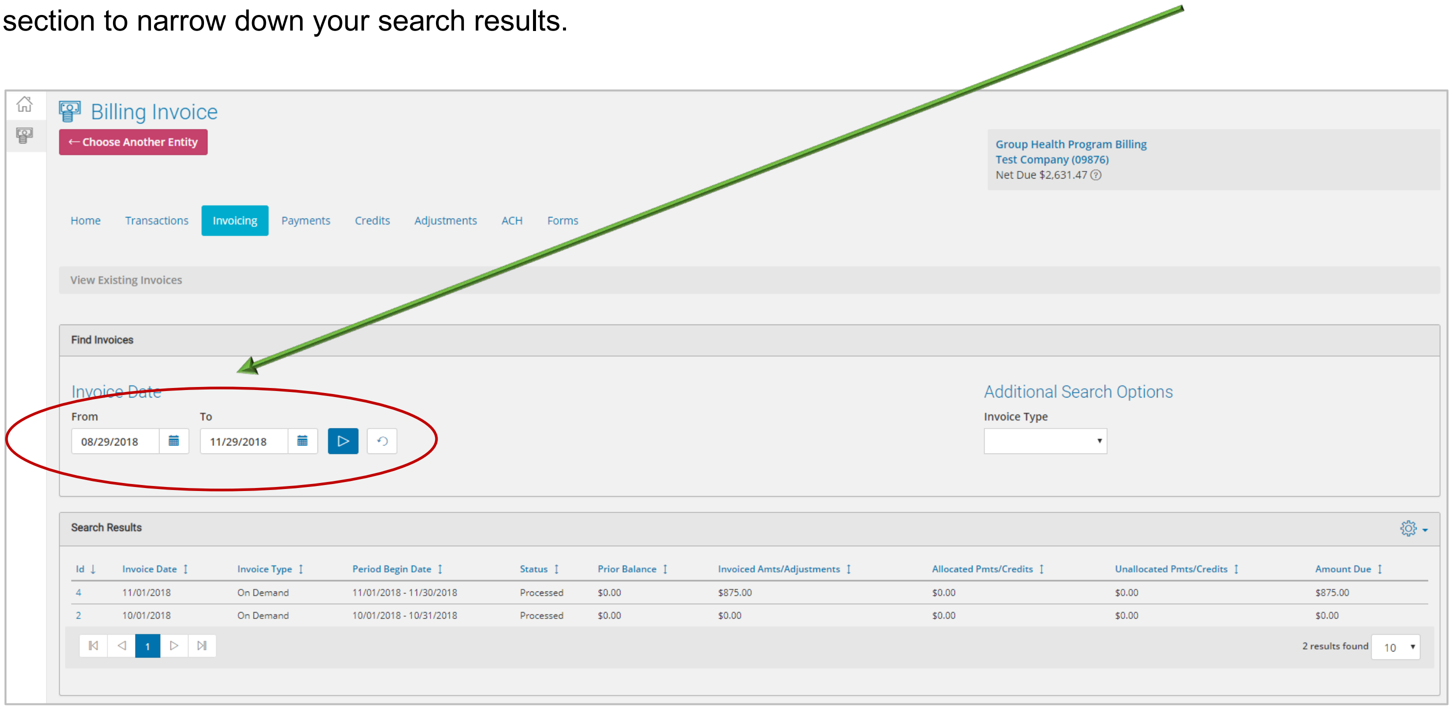
The “Billing Invoice” screen can be accessed from the home page by clicking on the “View this group’s statements” link in the Group Billing Summary panel.



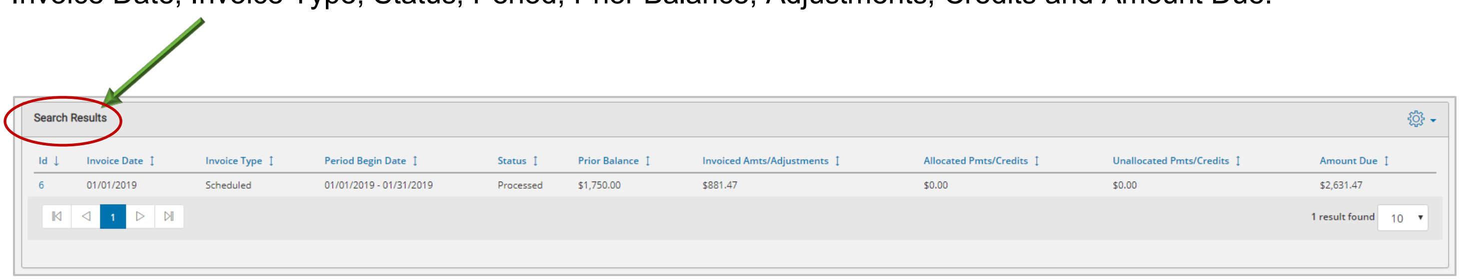
You can also access the “Billing Invoice” screen from the “Invoicing” tab from the “Billing Details” screen.



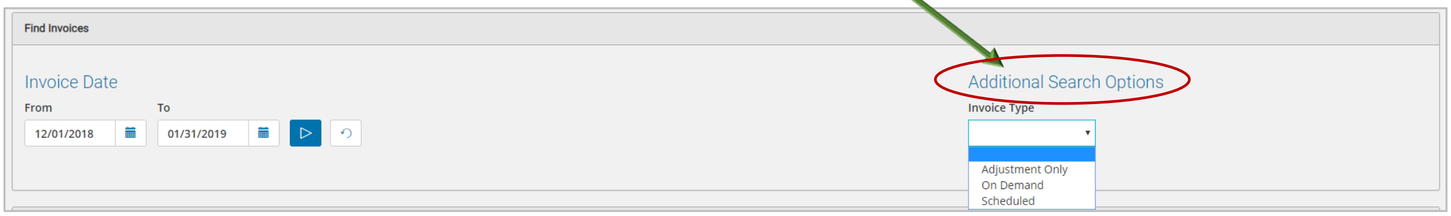
From the “Billing Invoice” screen, you can enter a specific invoice date or date range in the “Find Invoices” section to narrow down your search results.

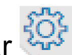


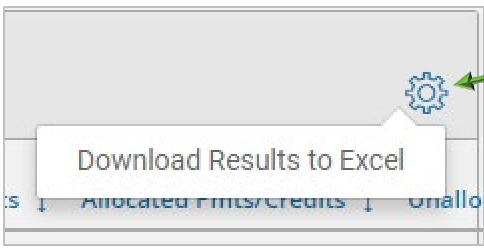
Once you have entered a date or date range, click the arrow and you will see invoices from the selected date or date range. Under “Search Results”, you can sort invoices by clicking on the column headings which include Invoice Date, Invoice Type, Status, Period, Prior Balance, Adjustments, Credits and Amount Due.



The “Find Invoices” section of this screen also provides “Additional Search Options” and you can use the “Invoice Type” window to search for Adjustment Only, On Demand or Scheduled invoices. If you do not select an invoice type, you will see all invoice types for the selected date or date range.

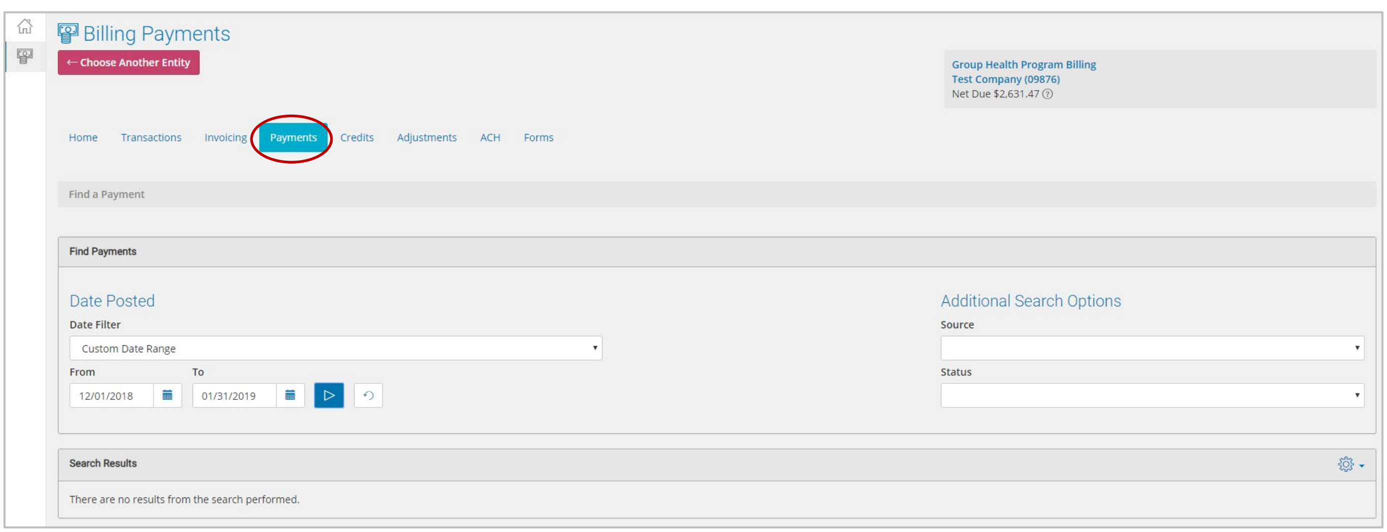


You can download your results to an Excel file by clicking on the gear  icon.

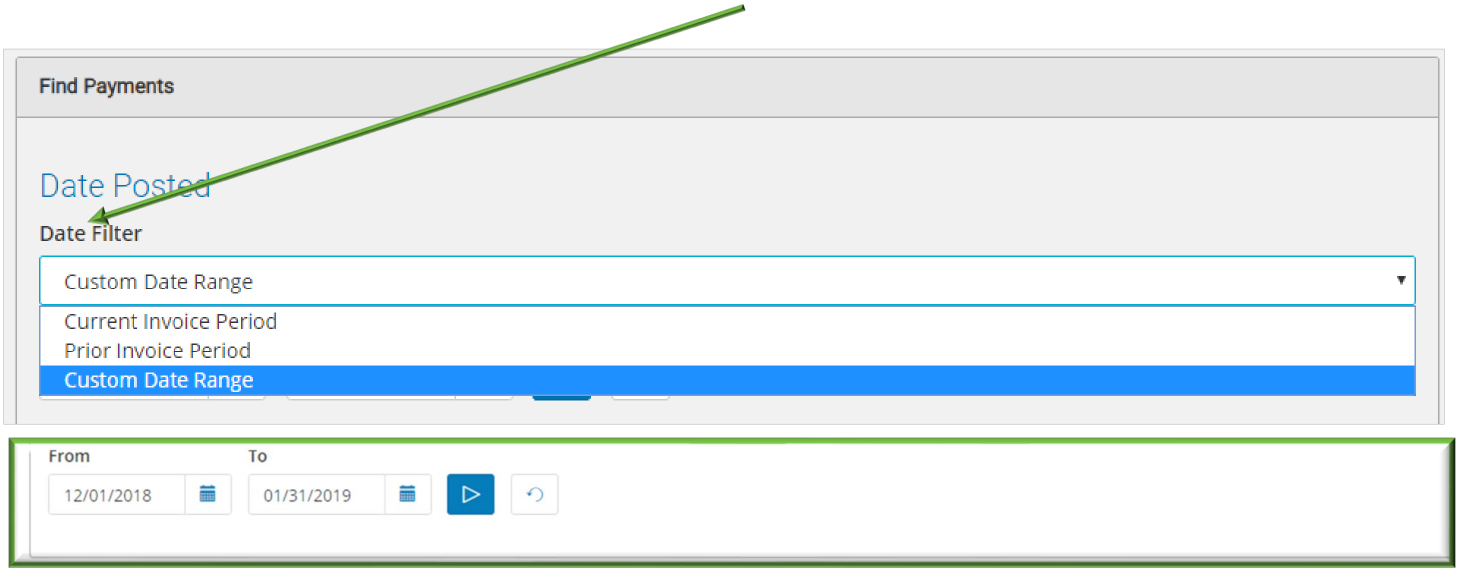


Billing Payments

The “Billing Payments” screen provides information about your most recent payment details. Click on the “Payments” tab of the “Billing Details” screen to navigate to “Billing Payments.”

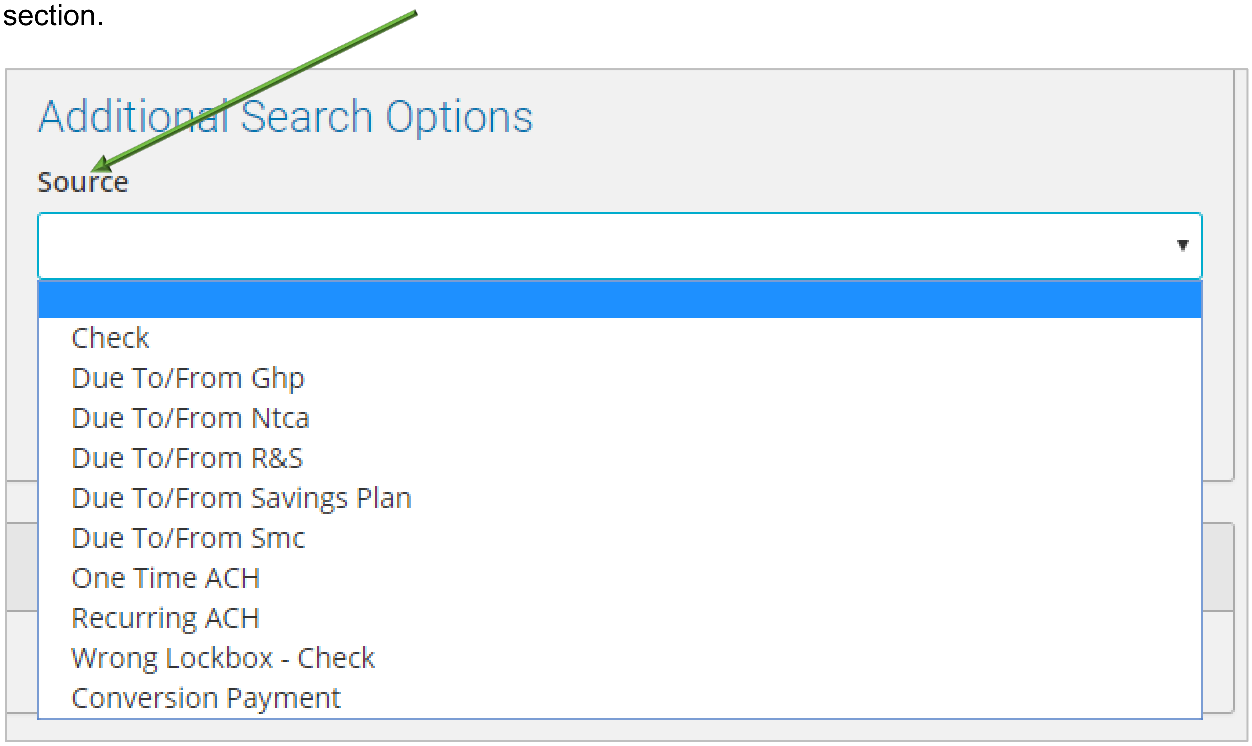


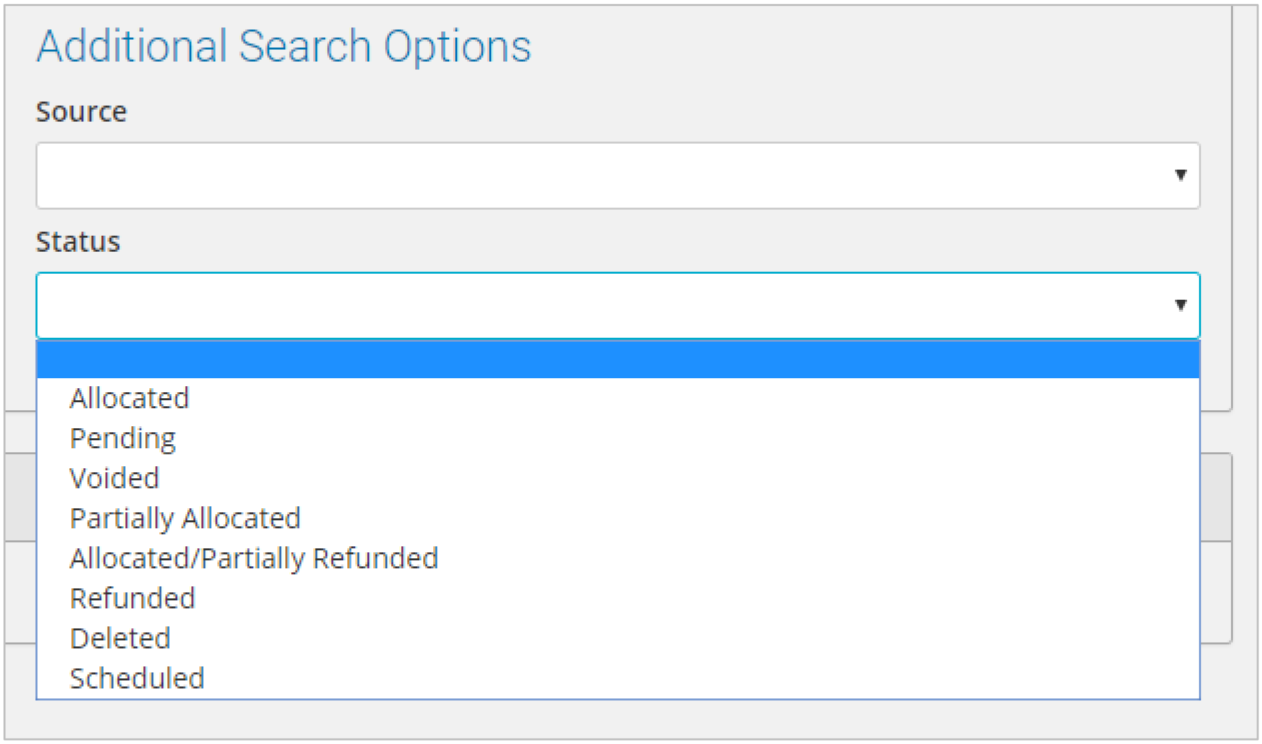
From the “Billing Payments” screen, go to the “Find Payments” section to select the Current Invoice Period, the Prior Invoice Period or enter a Custom Date Range from the “Date Filter.”



Once you select from the Current Invoice, Prior Invoice Period or a Custom Date Range option, click the arrow to see your payments.

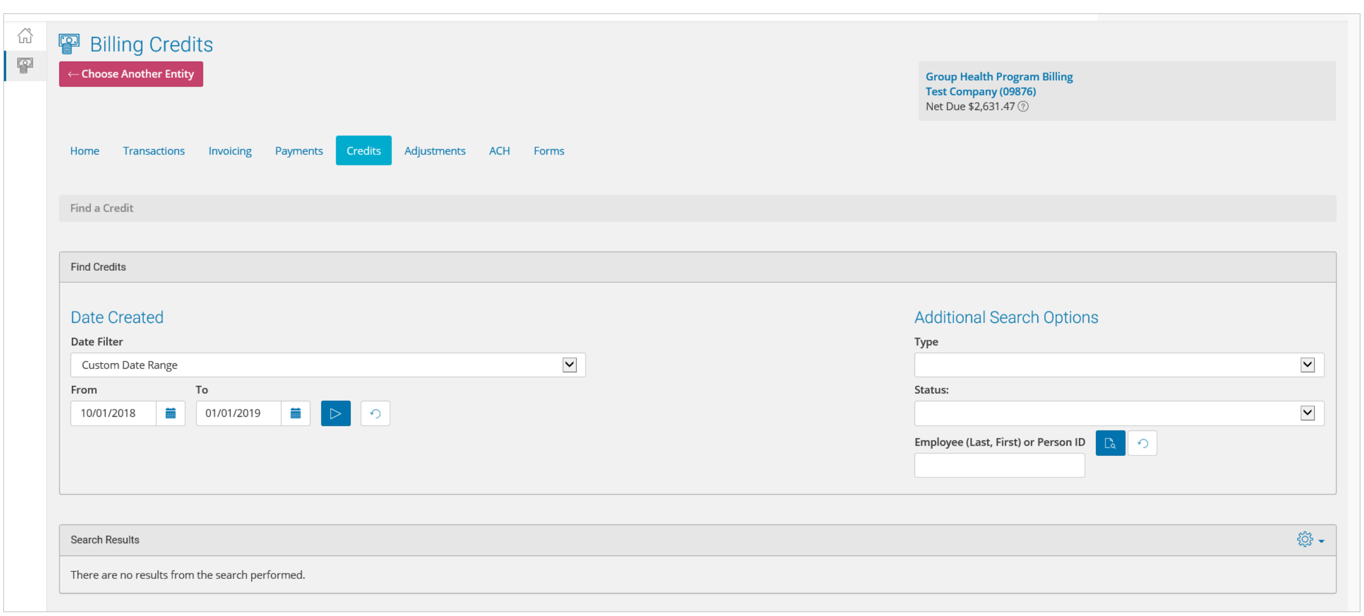
You can also search by payment “Source” and/or payment “Status” from the “Additional Search Options” section.



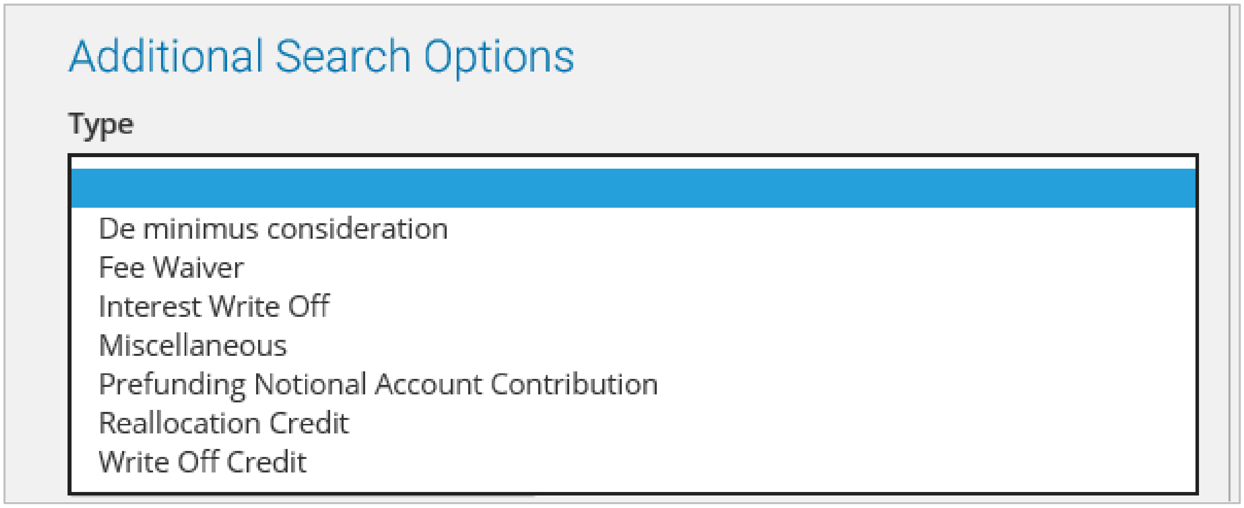


Billing Credits

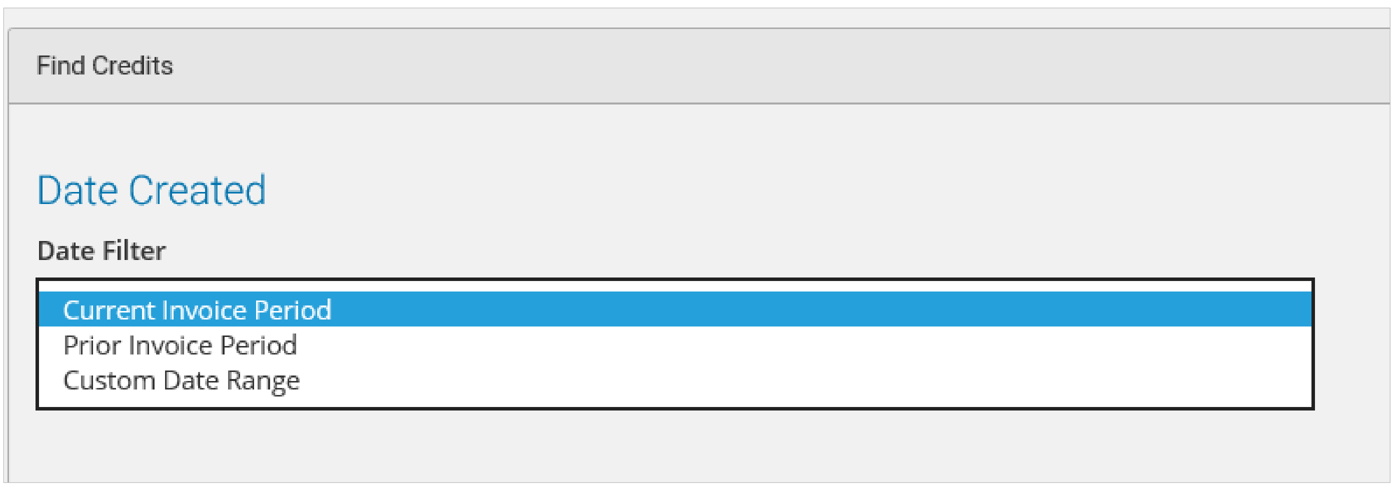
The “Billing Credits” screen provides detailed information about credits that may be applied to your account by NTCA’s finance department. Click on the “Credits” tab from the “Billing Details” screen to navigate to “Billing Credits.”



You can see details about the credits applied to your billing account by clicking the dropdown list under "Additional Search Options."

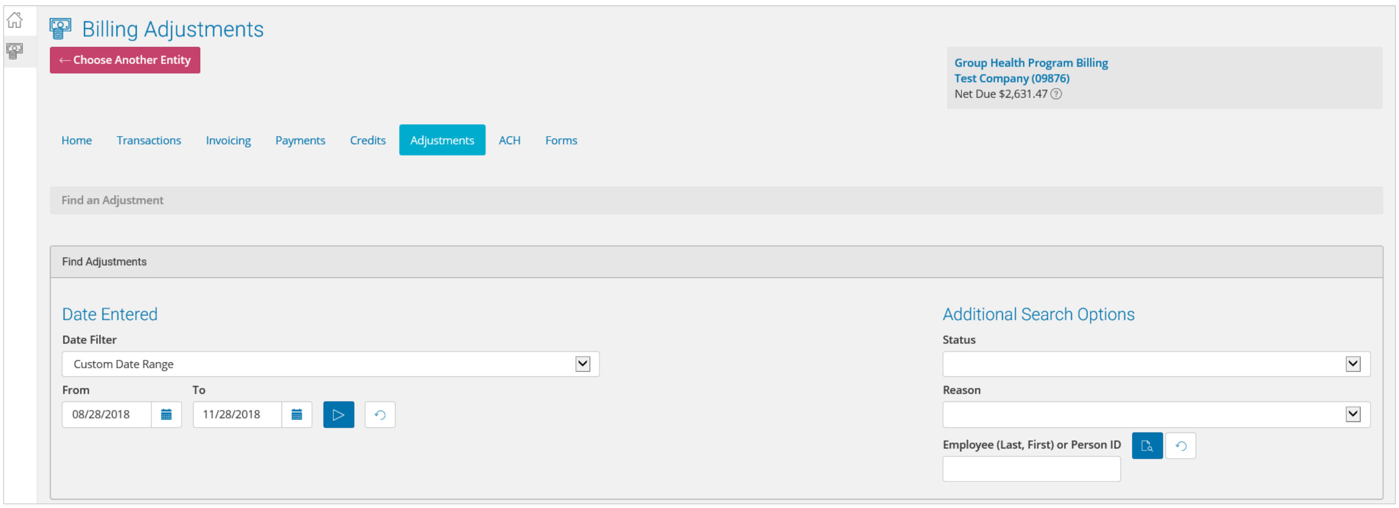


You can also search for an applied credit using the "Date Filter" under "Date Created."

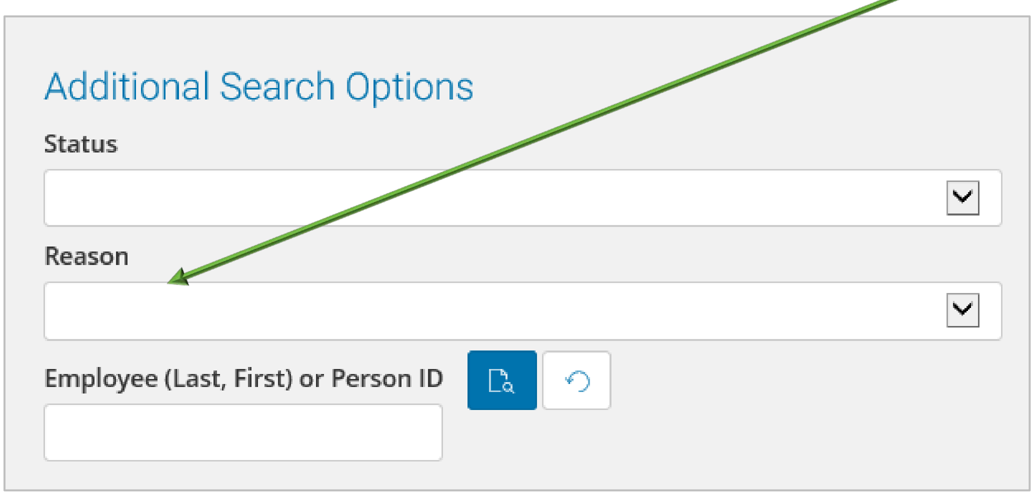


Billing Adjustments

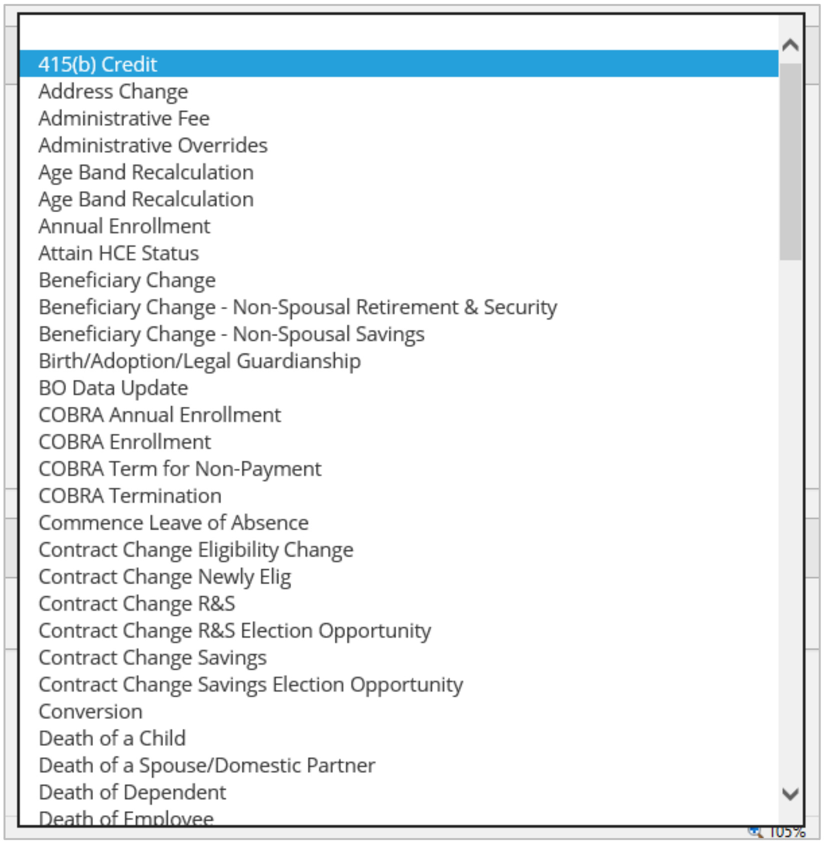
The “Adjustments” screen provides detailed information about adjustments that are in process or completed and included on your invoices. Click on the “Adjustments” tab from the “Billing Details” screen to navigate to “Billing Adjustments.”



Billing adjustments are typically issued when there is a change in status or other event for your plan participants that initiates additional billing charges or billing credits. You can see the reasons billing adjustments are generated by opening the dropdown list under “Additional Search Options” and selecting “Reason.”

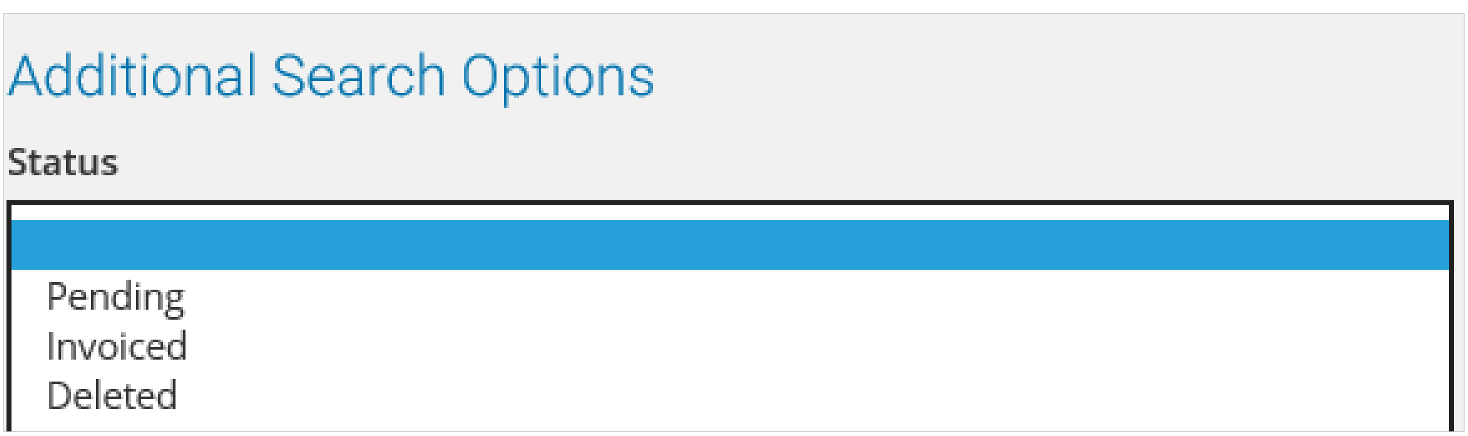


The following screen shows a partial list of reasons a billing adjustment may be issued to your company.

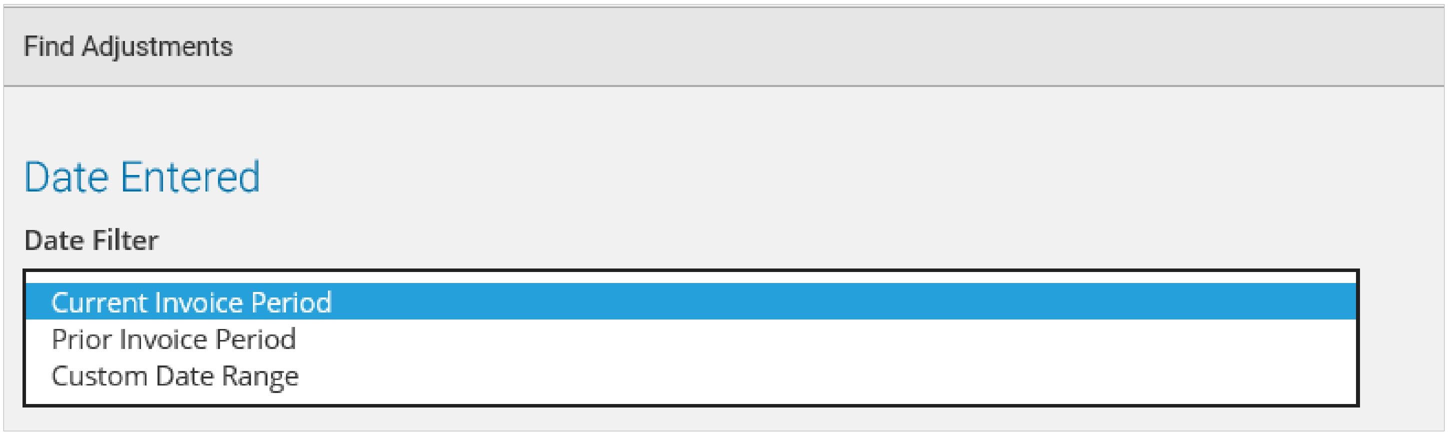


You can also check the status of a billing adjustment using the “Status” field under “Additional Search Options.” Just open the dropdown list and select one of these options:

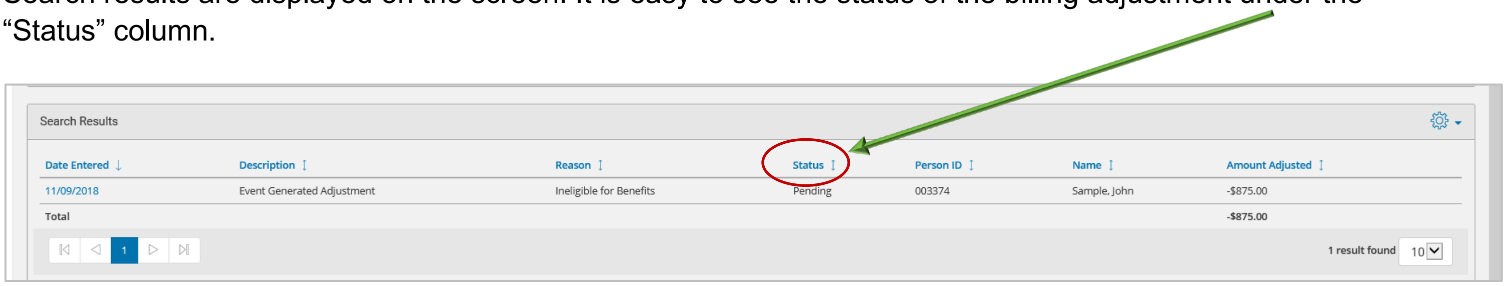
- Pending – this option shows you adjustments that have been created and will be included on a future monthly billing.
- Invoiced – this option shows you adjustments that have been completed and included on a billing.
- Deleted – this option shows you adjustments that were deleted and not included on a billing.



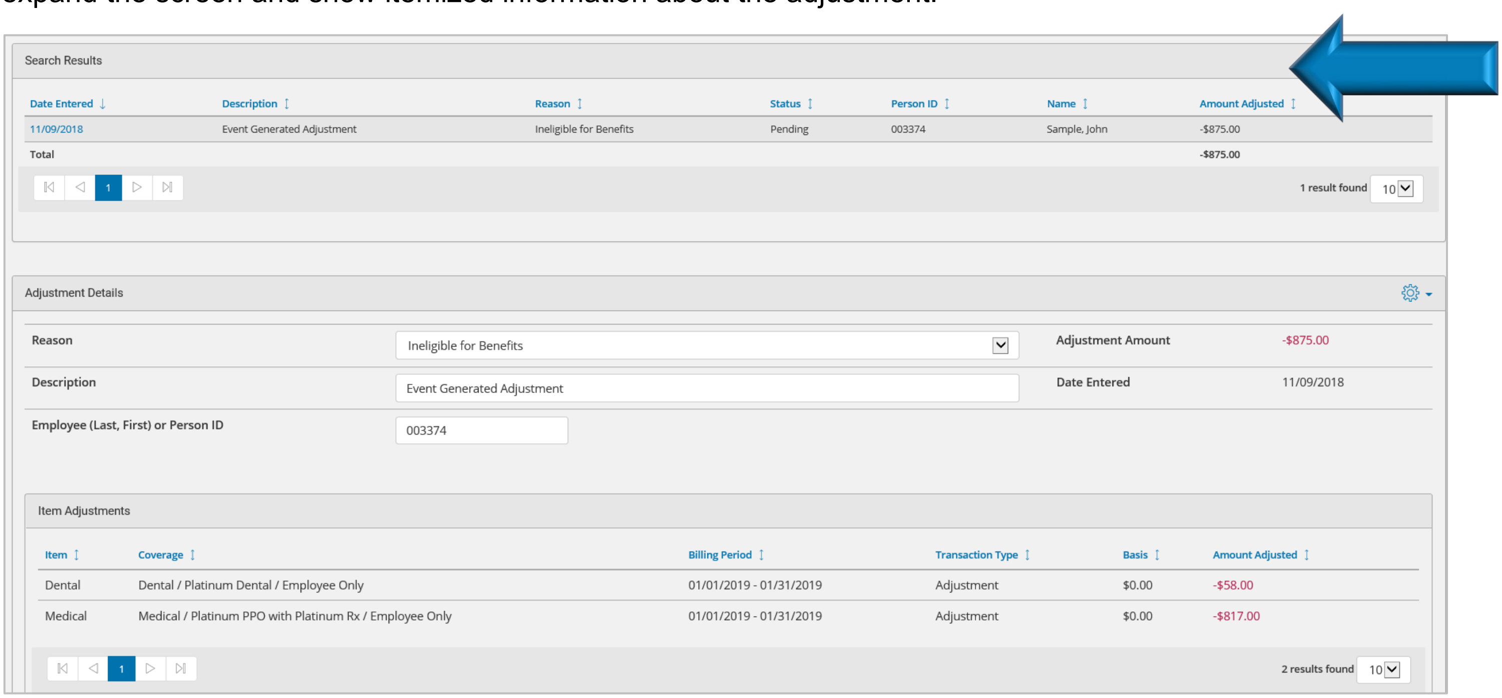
Using the “Date Entered” field, you can search for billing adjustments issued in the current invoice period, in a prior invoice period or in a specific date range. Just open the dropdown list in the “Date Filter” to access these search options.



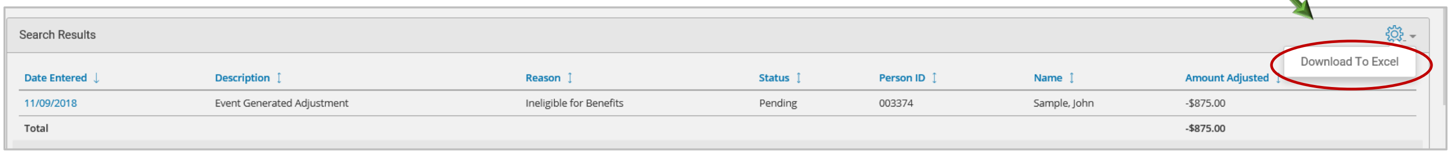
Search results are displayed on the screen. It is easy to see the status of the billing adjustment under the “Status” column.



More details about the billing adjustment can be viewed by simply highlighting and clicking the entry. This will expand the screen and show itemized information about the adjustment.

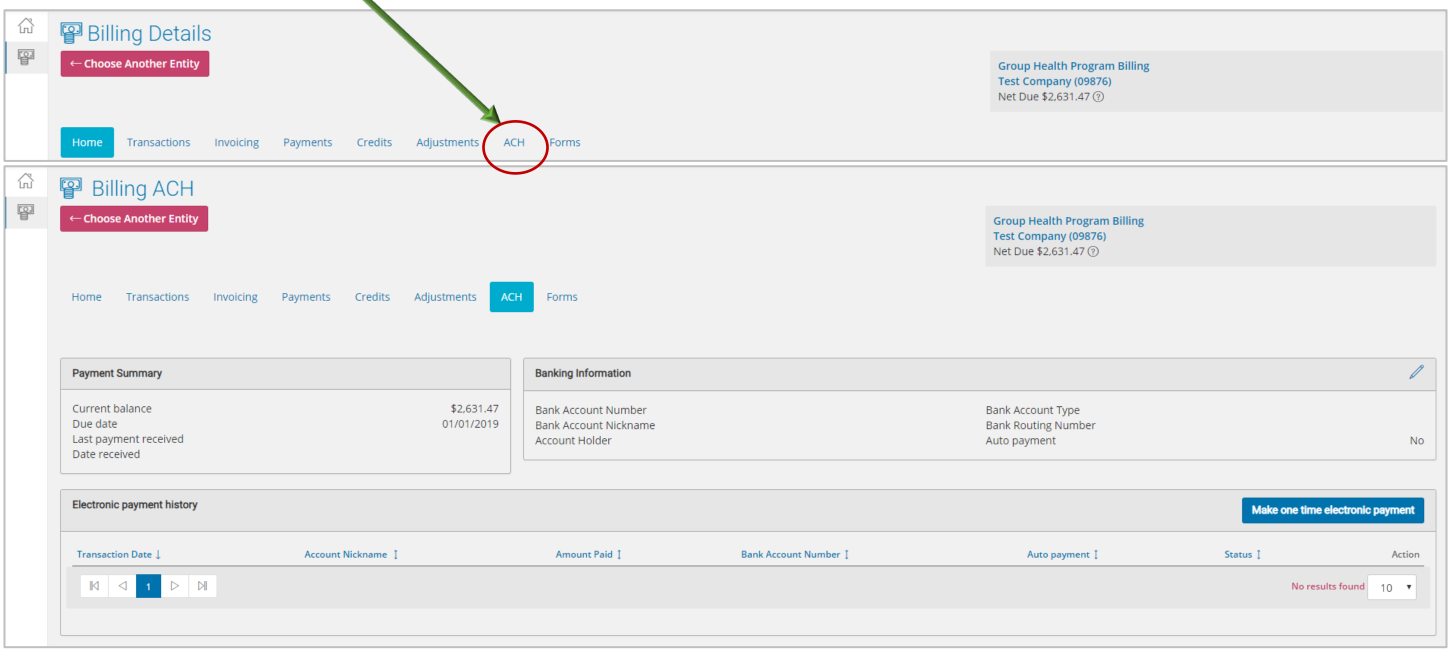


You can download the information to an Excel report by clicking the gear icon and selecting “Download To Excel.” The Excel file will open in a new window.

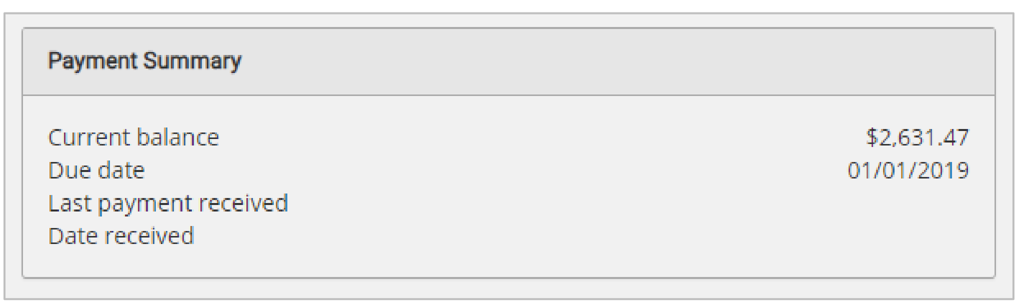


Billing ACH

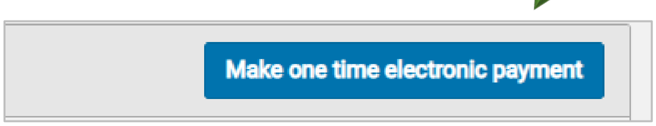
The “ACH” screen is where you will go to make a one-time electronic payment or set up recurring ACH payments. Click on the “ACH” tab on the “Billing Details” screen to navigate to “Billing ACH.”



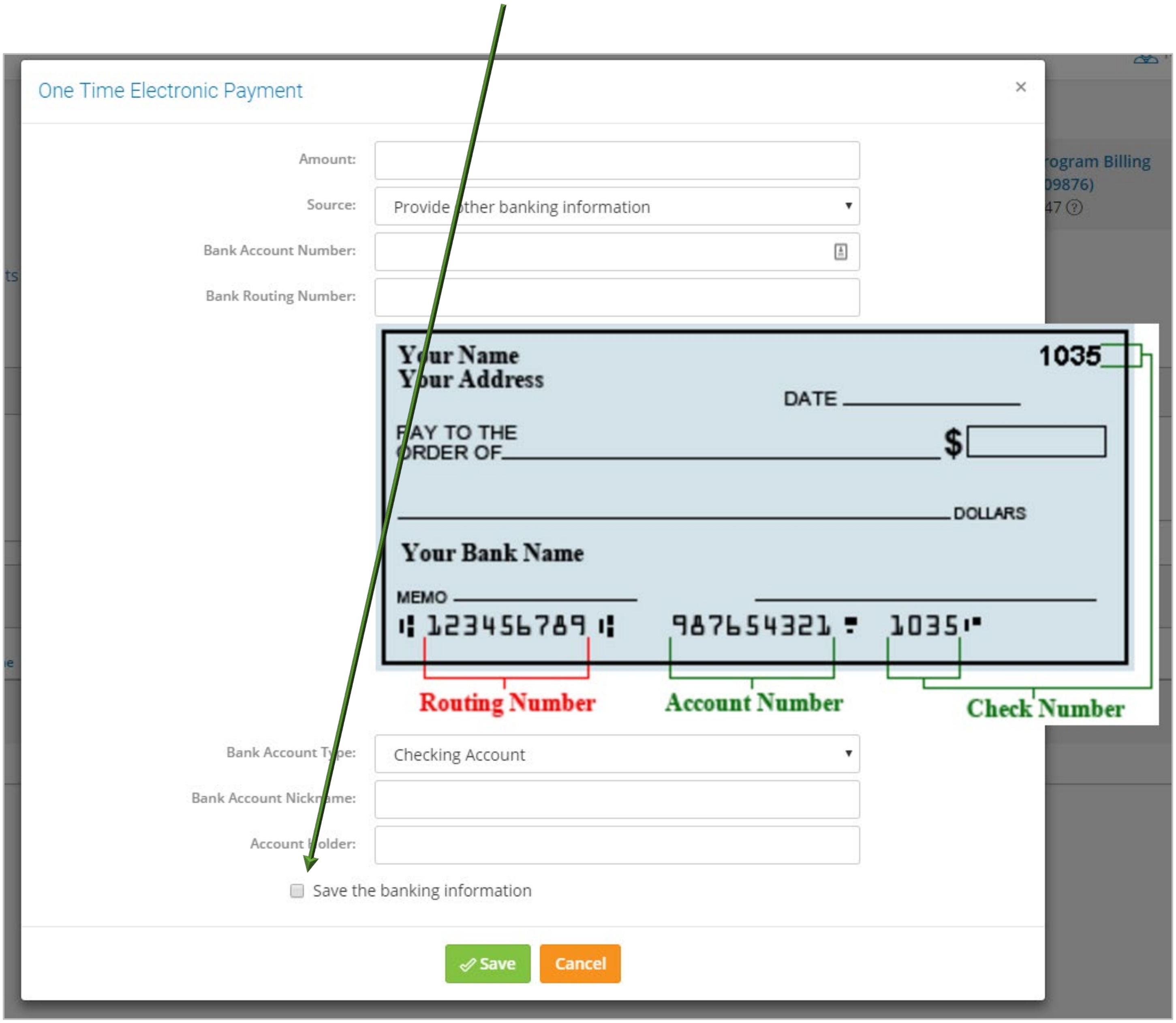
The “Payment Summary” section on this screen provides a snapshot view of your current balance, due date, last payment amount received and the date it was received.

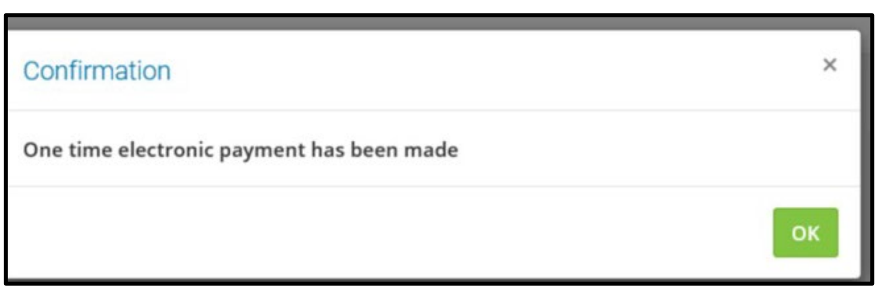


From the “Billing ACH” screen, click on the “Make one time electronic payment” button to navigate to the “One Time Electronic Payment” screen.

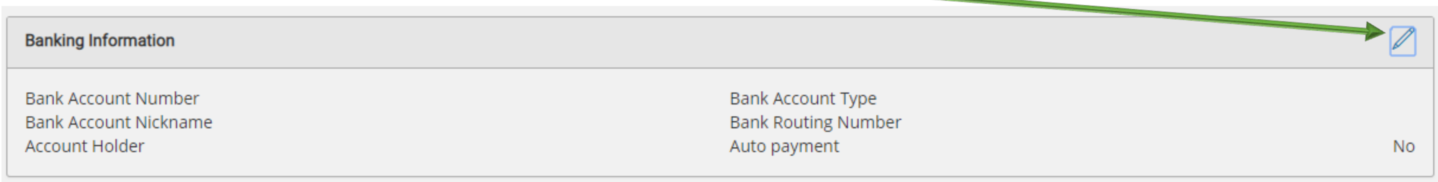


This will open an input screen where you can verify your current banking information (if previously provided and saved) or you can enter your banking information. Click the "Save the banking information" box if you want to save your banking information on the secure *My NTCA Benefits* portal. After you have completed your input of banking information, click the "Save" button to initiate your electronic payment. After your electronic payment is completed, you will receive a confirmation message. Use the "Cancel" button if you do not want to complete the one-time electronic payment.

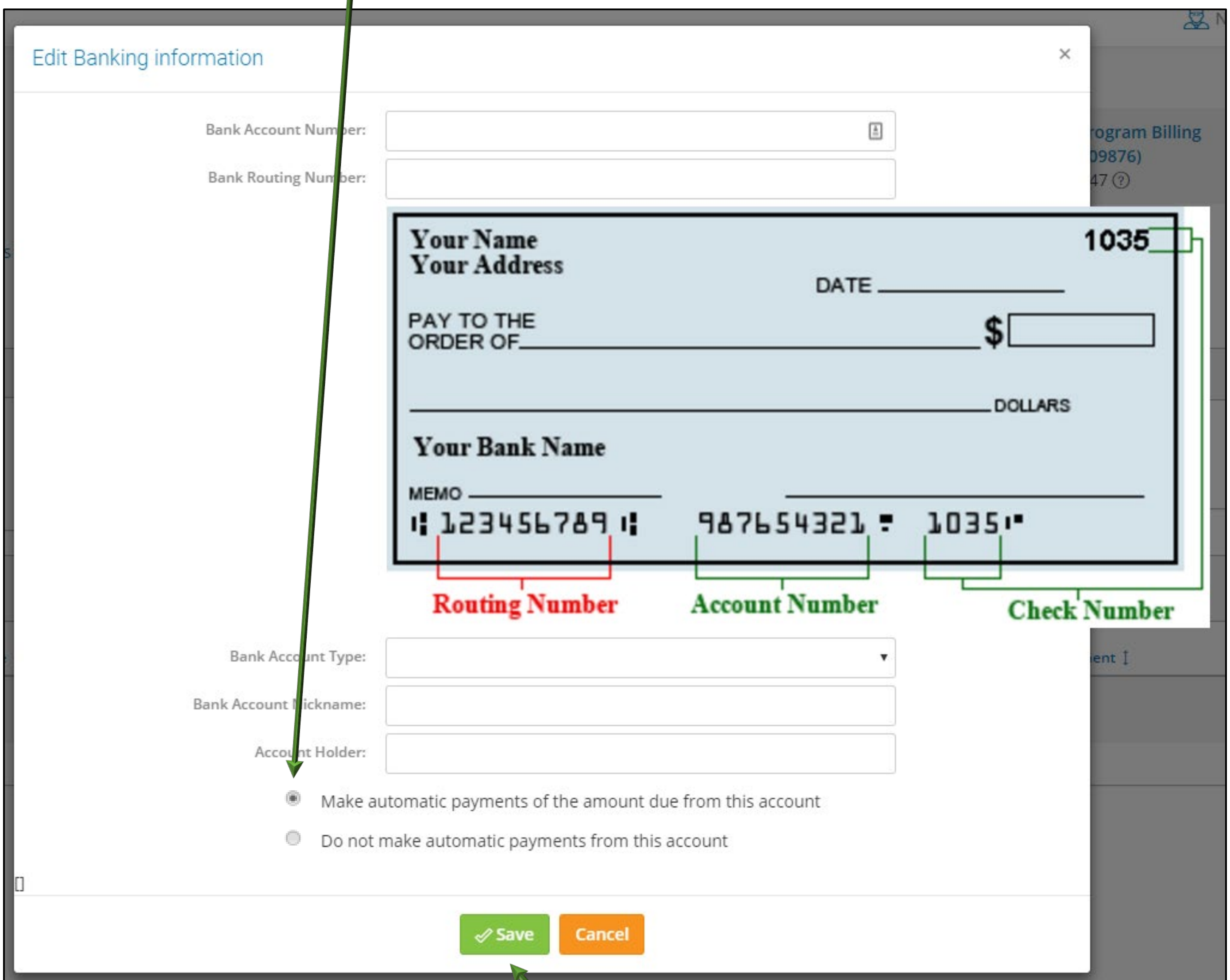




To make a recurring ACH payment, click on the pencil icon found in the “Banking Information” section.

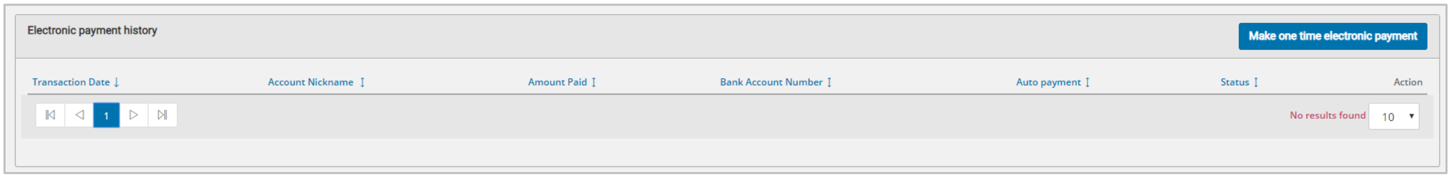


The “Edit Banking Information” screen will be presented, and you can enter your banking information. Click on the “Make automatic payments of the amount due from this account” box to set up your monthly automatic “ACH” payment.



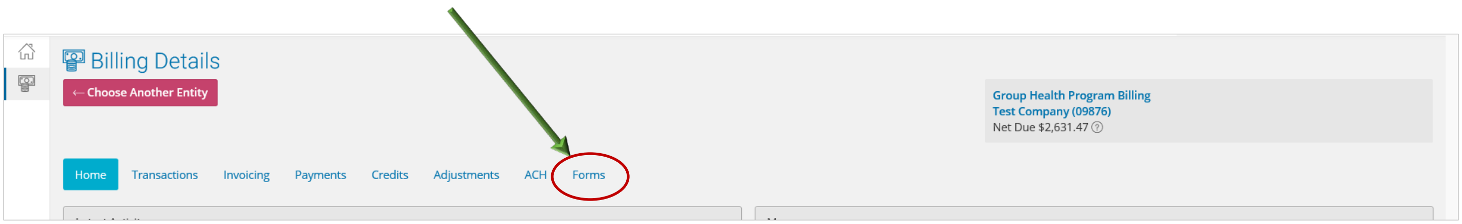
Once all the information has been entered, click “Save” to set up your recurring ACH payments. Use the “Cancel” button if you do not want to complete the setup of recurring ACH payments.

The “Electronic payment history” section of this screen provides a history of your electronic payments. Click on the column headings to sort by Transaction Date, Account Name, Amount Paid, Bank Account Number, Auto Payment, or Source.

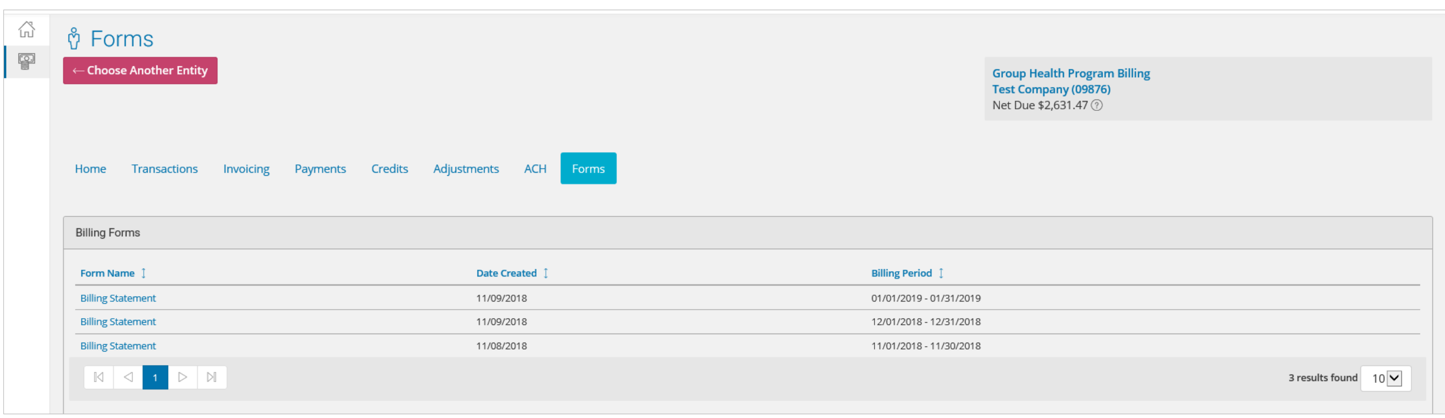


Forms

“Forms” provides a list of your invoices for a selected billing group (e.g., Group Health Program, R&S Program, Member Section 125, Member Section 105.) Click on the “Forms” tab from “Billing Details” to navigate to the “Forms” screen.



You will see a list of your invoices along with the associated billing period. The following screen shows an example of Group Health Program billings for November 2018, December 2018 and January 2019 for Test Company (09876).



Highlight and click on the billing statement to download a PDF version of the invoice. You will have the option to open and/or save the PDF file. You can also print your invoices. Following are examples of the first page of an NTCA Group Health Program and Retirement & Security Program invoice.

NTCA BENEFITS
THE RURAL BROADBAND ASSOCIATION
Your Trusted Employee Benefits Partner

Test Company

,

Invoice Date: 01/01/2019
Billing Period: 01/01/2019 - 01/31/2019

NTCA Group Health Program Billing

Group #	Previous Balance	Amounts Paid	Amounts Invoiced	Adjustments	Credits	Total Due
09876	$1,750.00	$0.00	$881.47	$0.00	$0.00	$2,631.47

Enclosed is your 01/01/2019 NTCA Group Health Program billing, which includes an itemization of contributions due per participant. Please review the detail carefully and notify us of any discrepancies. Notices of additions, coverage changes or terminations received after the 15th day of the current billing period may be reflected on the following month's billing.

Payment is due on the first day of the month of coverage. Payments will be considered delinquent if not received within 20 days after this due date. Prorated interest of 1.5% per month will be assessed as of the 1st of the month following the due date. Additionally, termination proceedings may begin on accounts where contributions are not made in full within 20 days of the invoice date.

If you wish to pay this invoice online, go to https://ntcabenefits.ntca.org/employer, click on Billing, select the corresponding Group ID, and then click on the "ACH" tab. Autopayment elections through the My NTCA Benefits portal will enroll your company in monthly automatic recurring ACH, to be drafted on the 10th of each month, or the following business day. Any questions regarding this process can be directed to Theresa Stevens at tstevens@ntca.org or 703-351-2076.

For questions about the billing, please contact a NTCA benefits resource specialist at benefitsresource@ntca.org or 828-281-9000, Monday - Friday, 9 a.m. - 8 p.m. ET.

Retain the top portion for your records.
Detach bottom portion and remit with payment.

Please Do Not Send Correspondence with Payment.

Invoice Date: 01/01/2019
Due Date: 01/01/2019
Total Due: $2,631.47
Amount Paid:

Group #: 09876

Test Company

,

Remit payment to:
NTCA Group Health Program
P.O. Box 418858
Boston, MA 02241-8858

Processed 11/09/2018

NTCA BENEFITS
THE RURAL BROADBAND ASSOCIATION
Your Trusted Employee Benefits Partner

Test Company

,

Invoice Date: 10/01/2018
Billing Period: 10/01/2018 - 10/31/2018

NTCA Retirement and Security Program Billing

Group #	Previous Balance	Amounts Paid	Amounts Invoiced	Adjustments	Credits	Total Due
09876	$0.00	$0.00	$5,555.56	$0.00	$0.00	$5,555.56

Enclosed is your 10/01/2018 NTCA Retirement and Security Program Billing invoice, which includes an itemization of contributions due per participant. Please review the detail carefully and notify us of any discrepancies. We appreciate your completion of the appropriate form(s) for each type of event. Notices of additions, coverage changes or terminations received after the 15th day of the current billing period may be reflected on the following month's billing.

Payment is due on the first day of the month of coverage. Payments will be considered delinquent if not received within 30 days of this due date. Prorated interest of 1.5% per month will be assessed on delinquent payments. Additionally, termination proceedings may begin on accounts where contributions are not made in full within 30 days of the invoice date.

If you wish to pay this invoice online, go to https://ntcabenefits.ntca.org/employer, click on Billing, select the corresponding Group ID, and then click on the "ACH" tab. Autopayment elections through the My NTCA Benefits portal will enroll your company in monthly automatic recurring ACH, to be drafted on the 10th of each month, or the following business day. Any questions regarding this process can be directed to Theresa Stevens at tstevens@ntca.org or 703-351-2076.

For questions about the billing, please contact a NTCA benefits resource specialist at benefitsresource@ntca.org or 828-281-9000, Monday - Friday, 9 a.m. - 8 p.m. ET.

Retain the top portion for your records.
Detach bottom portion and remit with payment.

Please Do Not Send Correspondence with Payment.

Invoice Date: 10/01/2018
Due Date: 10/01/2018
Total Due: $5,555.56
Amount Paid:

Group #: 09876

Test Company

,

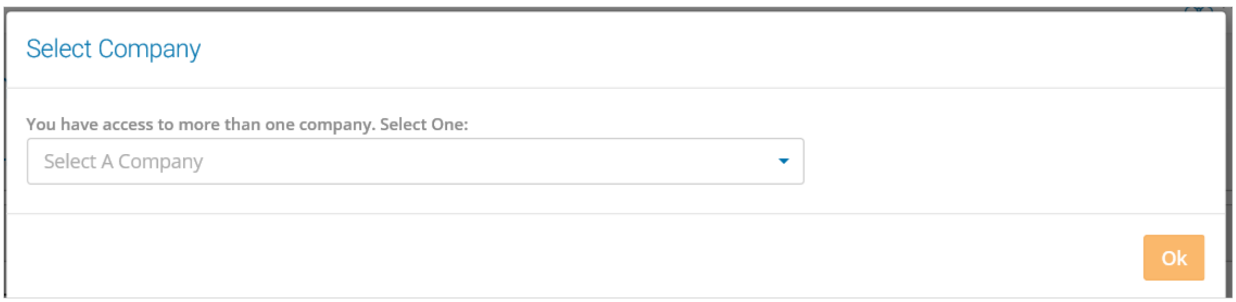
Remit payment to:
NTCA Retirement & Security Program
P.O. Box 418919
Boston, MA 02241-8919

Processed 11/08/2018

Company Information

You can view details about a company's elected NTCA benefits in "Company Info". From the home page, select the "Company Info" icon from the left side of the screen.

If you administer NTCA benefits for more than one company, "Select Company" panel will display.



Using the drop-down navigation menu, select a company from the list presented.

Company Details

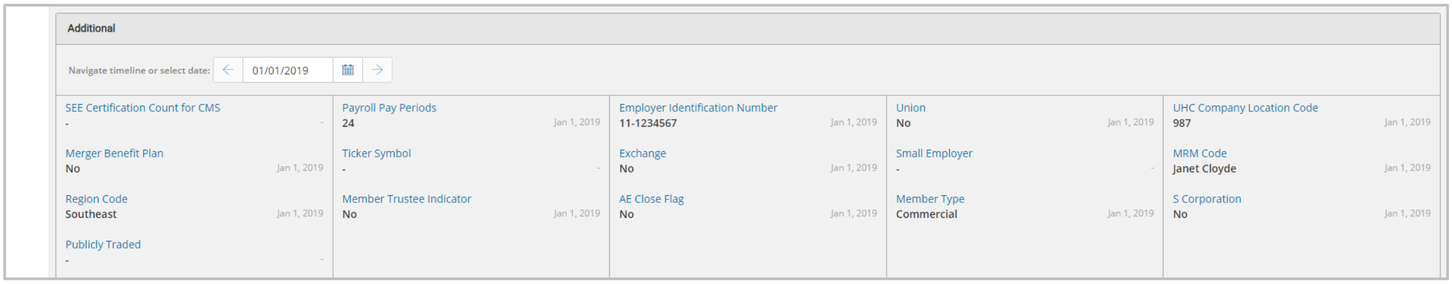
Information on this screen includes:

<u>Basic</u>
Shows the company name, NTCA member number (organization ID) and controlled group information.

Quick Tip: Use the “Choose Another Company” toggle to quickly access another company (if applicable.)

Additional

Data in this section is most frequently used by NTCA benefits administration personnel.



Company Address

This is the address used by NTCA for mailing benefits communications and other materials to the company location.

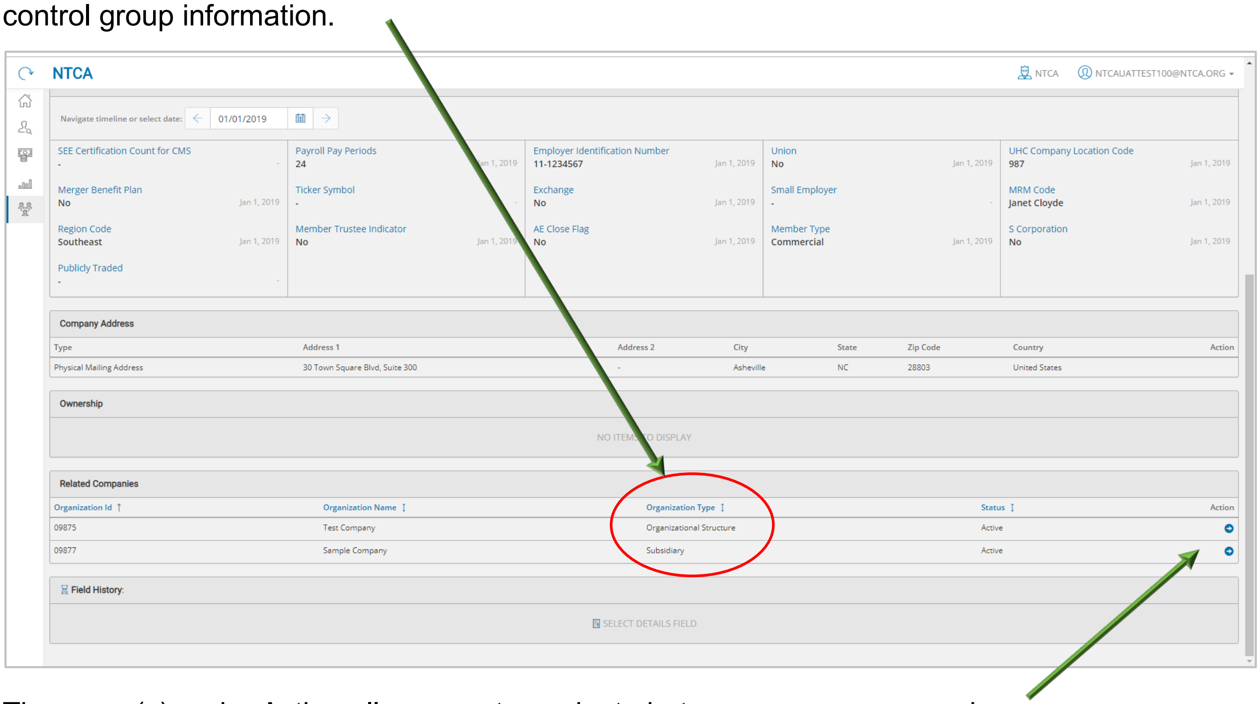
Company Address

Type	Address 1	Address 2	City	State	Zip Code	Country
Physical Mailing Address	30 Town Square Blvd, Suite 300	-	Asheville	NC	28803	United States

Ownership/Related Companies

Much of this data is maintained by NTCA benefits administration personnel and used for compliance testing.

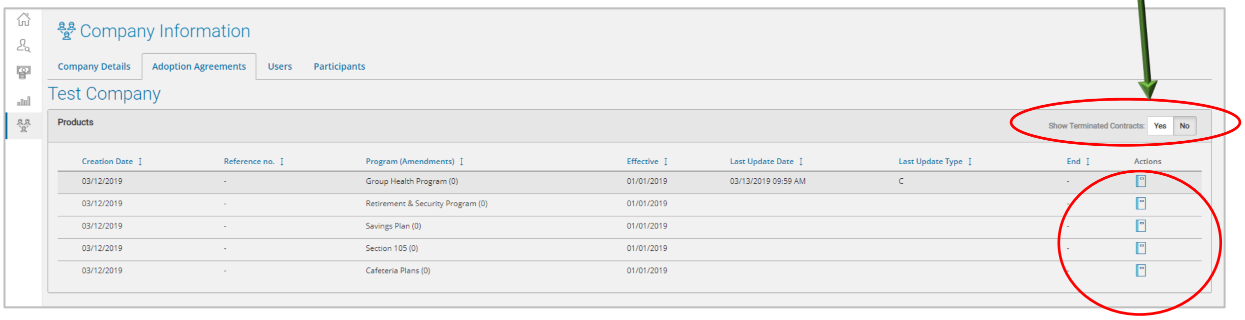
Quick Tip: You will see the wording “Organizational Structure” under the column “Organization Type” in the Related Companies panel. All company records will show this wording so NTCA can accurately maintain control group information.



The arrow(s) under Action allows you to navigate between company records.

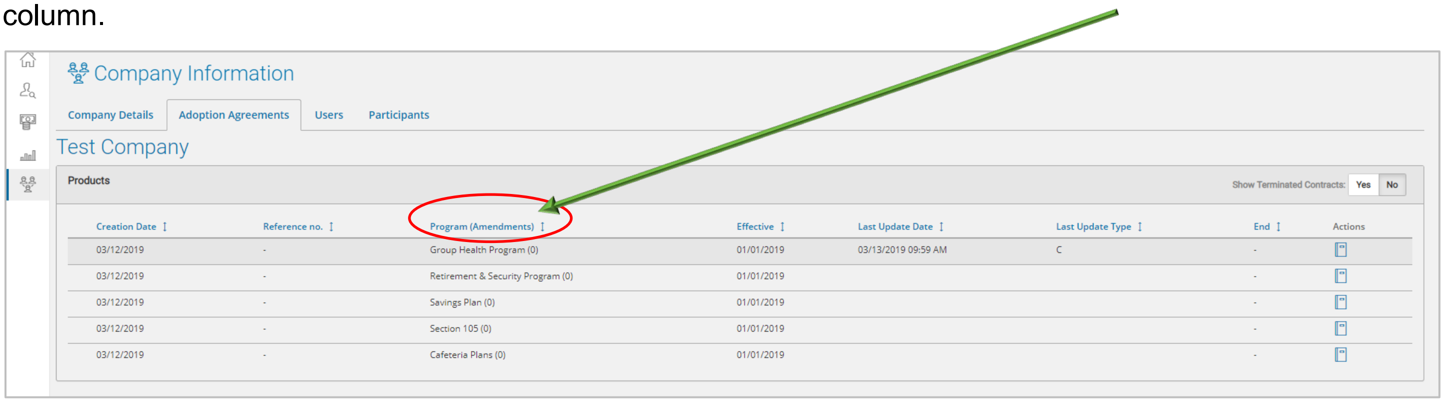
Adoption Agreements

This area shows details about the benefit plans currently offered by your company. If your company previously offered a plan(s), you can also see information about those plans by selecting “Yes” from “Show Terminated Contracts”.



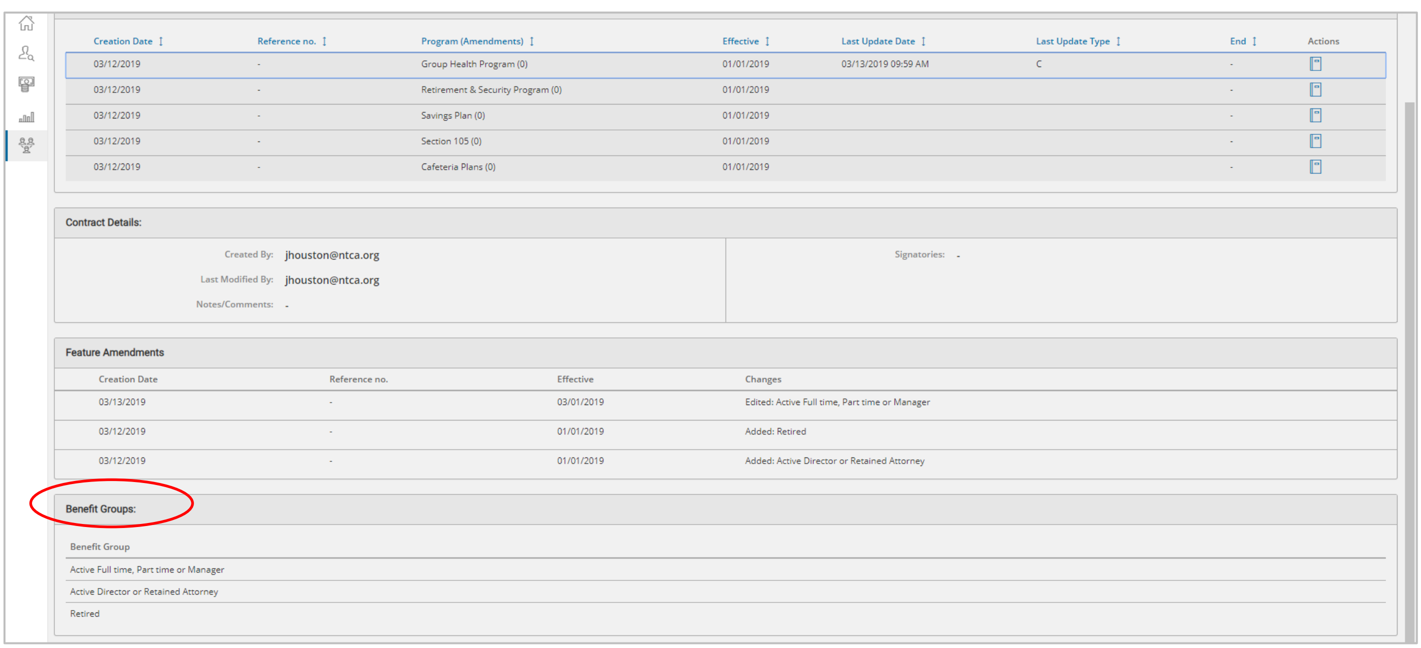
Products

If you want to view more details about the benefit plan, click on the name under the “Program (Amendments)” column.



Benefit Groups

This will expand the screen to show detailed information about the groups eligible for the specific plan.



Benefit Groups can be linked back to the elections on your NTCA Adoption Agreement for:

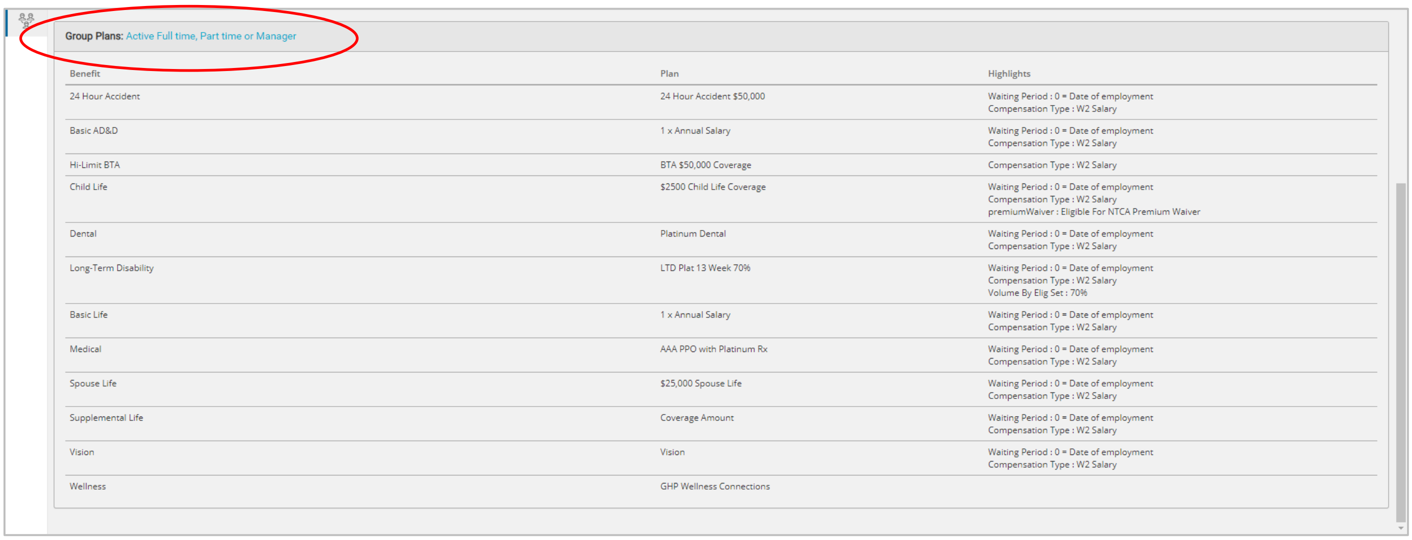
- Active Full time, Part time or Manager
- Active Director or Retained Attorney
- Retired
- Surviving Spouse of Active Full time, Part time or Manager

To view more information about the specific benefits offered to one of these groups, just highlight and click on that specific group shown on the screen.

Quick Tip: If you see a benefit group "FMLA Leave", "Active Short-Term Disability" or "Active Long-Term Disability"; NTCA benefits administration personnel may use these groups to administer benefits for an individual. It does not necessarily mean your company has elected benefits for the group(s). Also, there may not be any participants at your company in these groups.

<u>Group Plans</u>

After you select the Benefit Group, an expanded panel appears with a detailed list of NTCA benefit plan options adopted by your company. You can view details such as your elected medical plan(s), group life benefit volume, waiting periods and other information included on your Adoption Agreement.

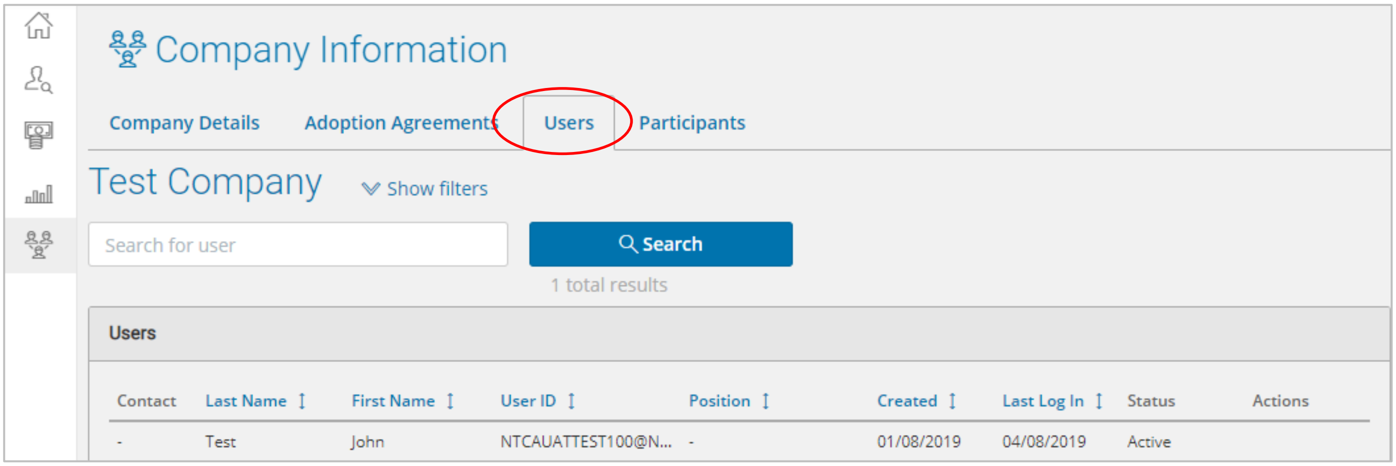


Group Plans: Active Full time, Part time or Manager

Benefit	Plan	Highlights
24 Hour Accident	24 Hour Accident $50,000	Waiting Period : 0 = Date of employment Compensation Type : W2 Salary
Basic AD&D	1 x Annual Salary	Waiting Period : 0 = Date of employment Compensation Type : W2 Salary
Hi-Limit BTA	BTA $50,000 Coverage	Compensation Type : W2 Salary
Child Life	$2500 Child Life Coverage	Waiting Period : 0 = Date of employment Compensation Type : W2 Salary premiumWaiver : Eligible For NTCA Premium Waiver
Dental	Platinum Dental	Waiting Period : 0 = Date of employment Compensation Type : W2 Salary
Long-Term Disability	LTD Plat 13 Week 70%	Waiting Period : 0 = Date of employment Compensation Type : W2 Salary Volume By Elig Set : 70%
Basic Life	1 x Annual Salary	Waiting Period : 0 = Date of employment Compensation Type : W2 Salary
Medical	AAA PPO with Platinum Rx	Waiting Period : 0 = Date of employment Compensation Type : W2 Salary
Spouse Life	$25,000 Spouse Life	Waiting Period : 0 = Date of employment Compensation Type : W2 Salary
Supplemental Life	Coverage Amount	Waiting Period : 0 = Date of employment Compensation Type : W2 Salary
Vision	Vision	Waiting Period : 0 = Date of employment Compensation Type : W2 Salary
Wellness	GHP Wellness Connections	

Users

This tab provides a list of individuals who currently have or previously had access to your company, participant, and billing records from the *My NTCA Benefits* portal. Users can be assigned different levels of access (i.e., security roles) to your company and participant information. Any updates that are needed to this information should be sent to NTCA.



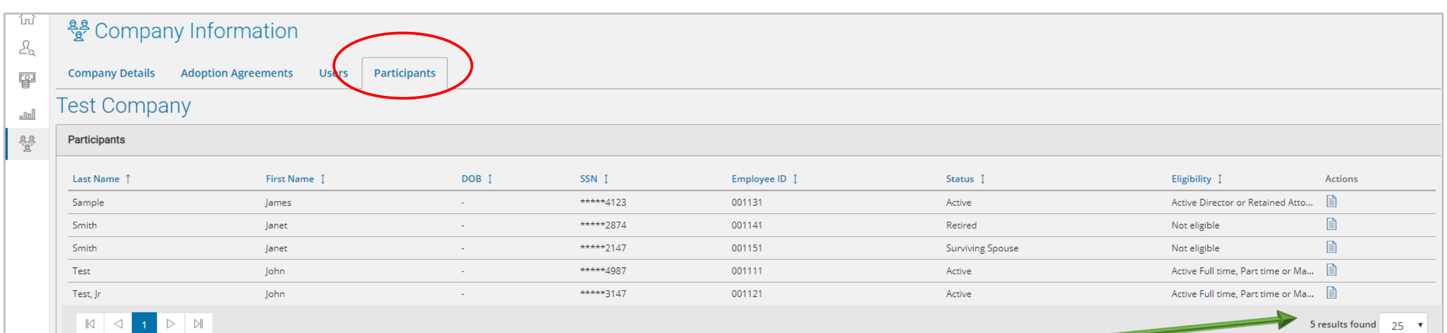
<u>Status</u>

This shows the current status of the user.

- Active – the person is a current authorized user.
- Disabled – the person is not authorized for access to the portal.
- Locked – the person is locked from access to the portal and may need a password reset. Users showing a locked status can contact NTCA for assistance.

Participants

Information found in this tab includes employment records for individuals reported to NTCA and are either currently participating in the NTCA benefit plans or previously participated in the plan(s). You can sort the list by clicking on any of the column headings.



Expand the results by using the “Results Found” box.

<u>Employee ID</u>

This is the NTCA assigned Alternate ID, also known as the Member ID. It is the number found on the NTCA GHP ID card if the individual participates in medical and/or dental coverage.

Status
Identifies if the participant is currently an Active Employee, Director or Retired/Surviving Spouse (with a lifetime extension of coverage).

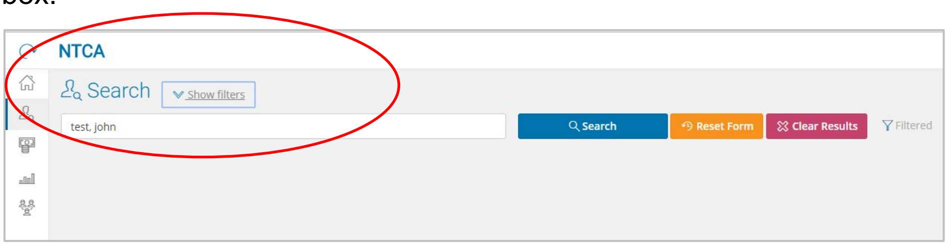
Eligibility
Shows if the individual is eligible for coverage in the listed benefit group (refer to Adoption Agreements).

Actions
Click on this icon to navigate to the participant's record.

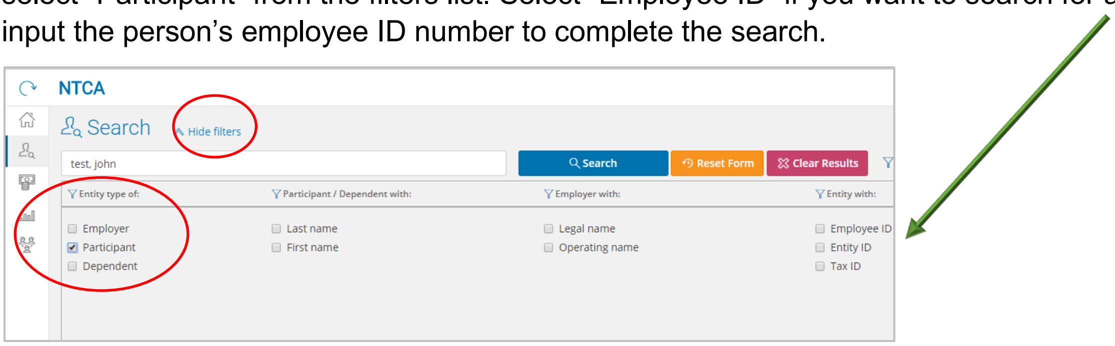
Participant Search

Detailed information about your participants' NTCA benefit plan elections and coverages is available using *My NTCA Benefits*. From the home page, select the Search icon from the left side of the screen.

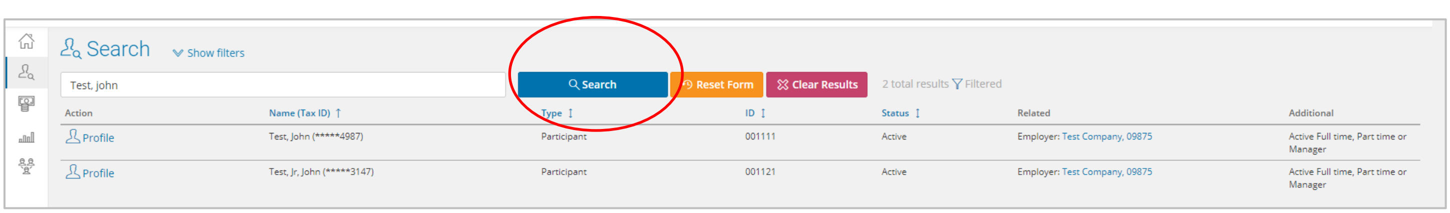
You can use search by the person's name, NTCA assigned ID number or Social Security number. You can locate the NTCA assigned ID number on your company's benefit plan bills. Input the information in the search box.



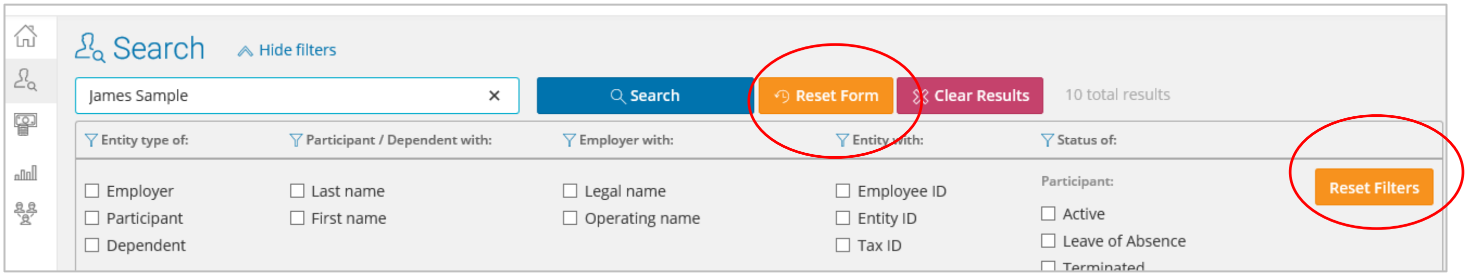
Use the filters to narrow your search. For example, if you want to search for a participant and no dependents, select "Participant" from the filters list. Select "Employee ID" if you want to search for a specific individual and input the person's employee ID number to complete the search.



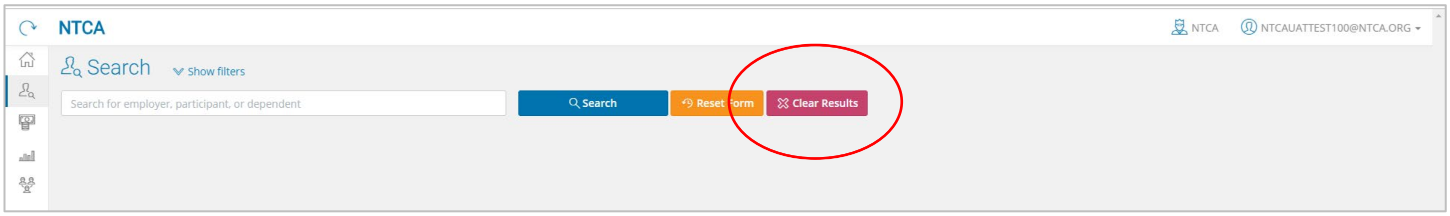
Press enter or select the blue "Search" button, and the record or a list of records matching the specific criteria will be displayed on the screen.



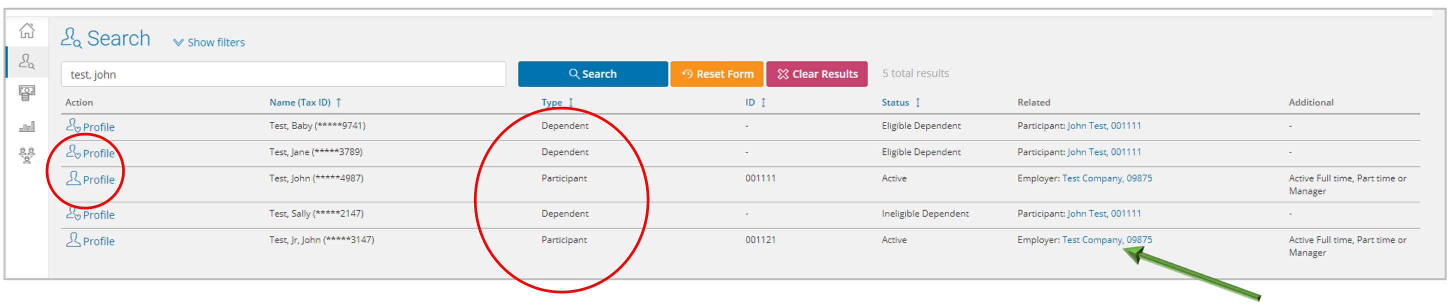
Select the “Reset Form” or “Reset Filters” button to clear the selected filters and information keyed into the search box.



The red “Clear Results” button will remove the record results and you can start a new search.



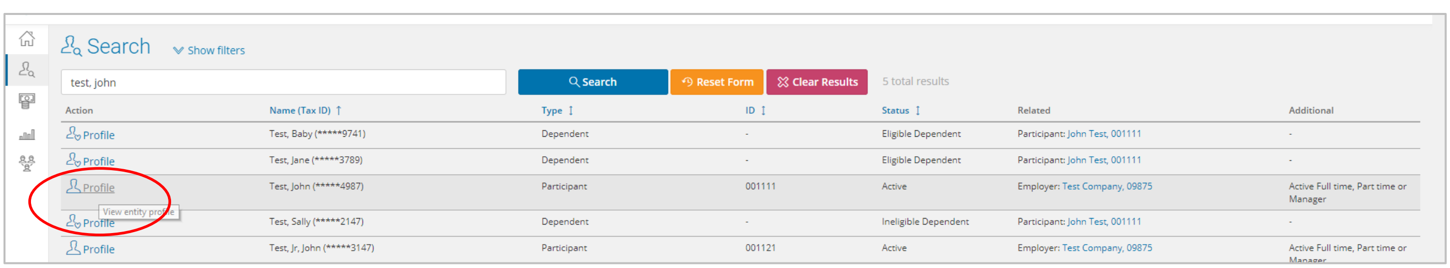
A “Profile” icon with a heart symbol reflects a dependent record. You can also identify dependents using the description listed in the “Type” column.



The information shown in the “Related” column provides the employer information associated with a participant and includes a quick link to the company record.

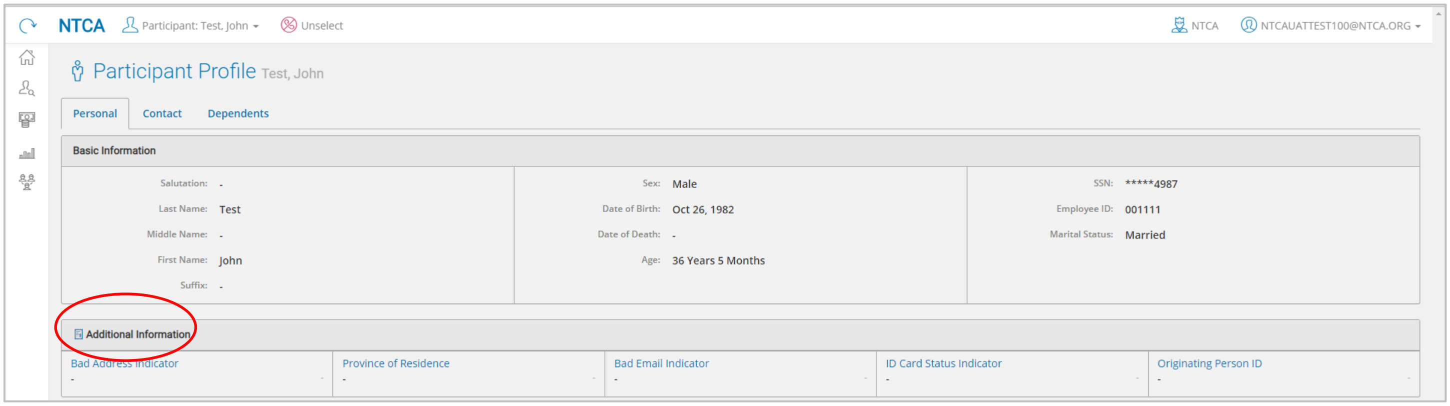
Participant Profile

Click on the “Profile” icon to access a specific record.

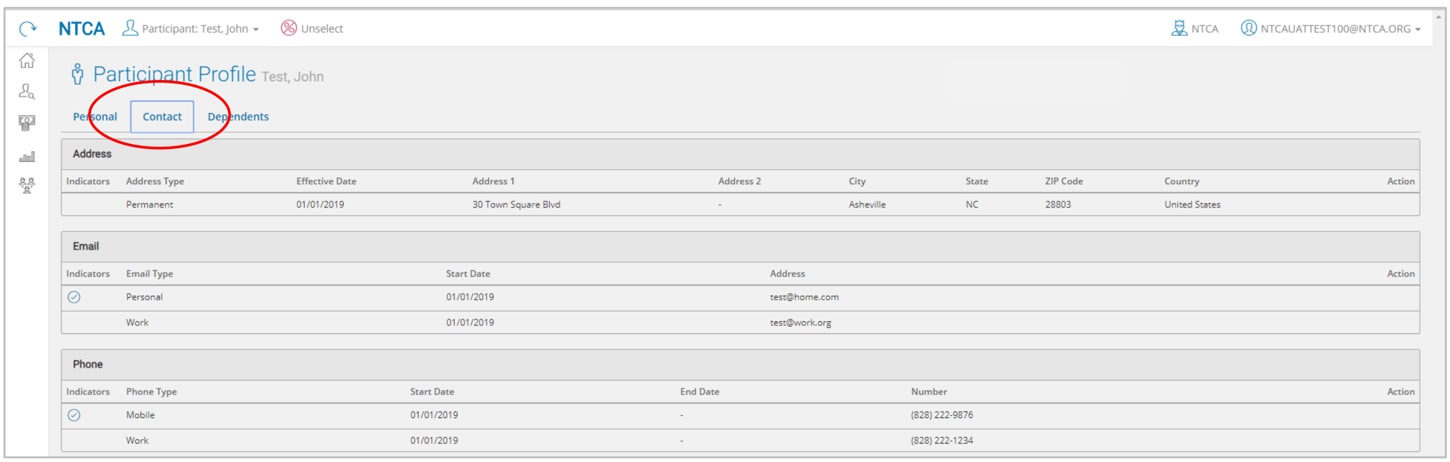


The “Personal” tab includes basic data such as individual’s name, date of birth, marital status and NTCA assigned ID number.

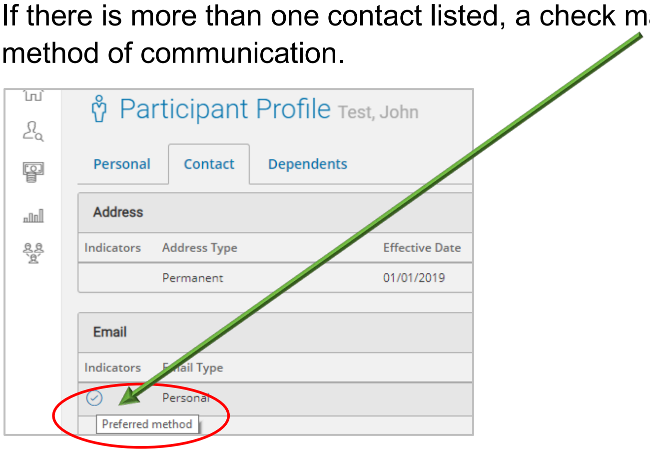
The “Additional Information” panel that displays on this screen includes data that is used by NTCA benefits administration personnel.



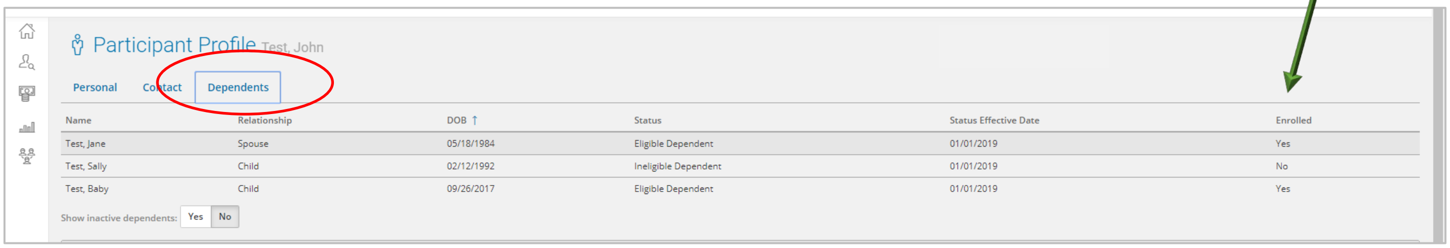
The “Contacts” tab shows current address, email and/or phone number information for the participant. NTCA benefits administration personnel use this contact information when sending benefits information directly to the participant.



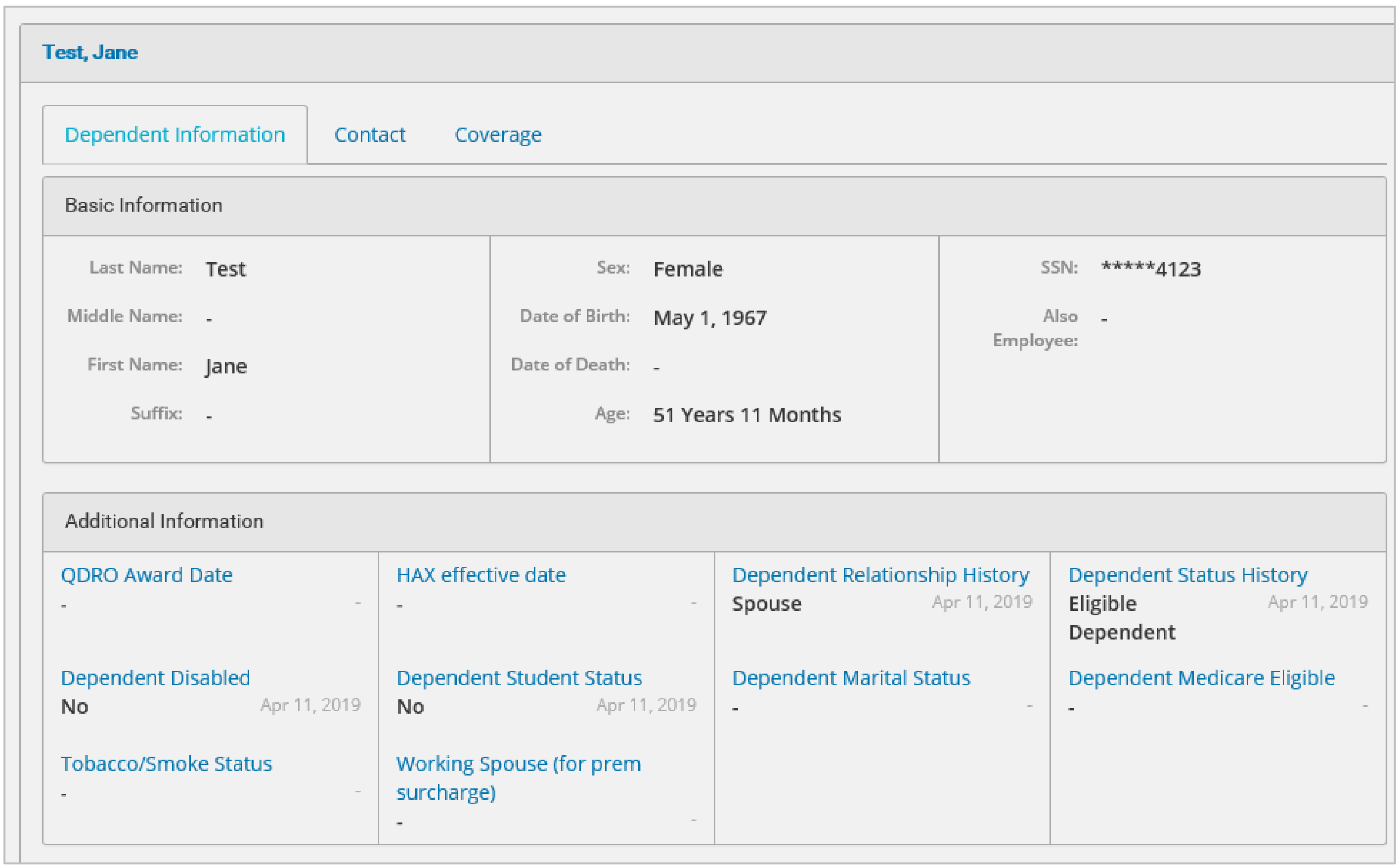
If there is more than one contact listed, a check mark beside a specific contact record indicates the preferred method of communication.



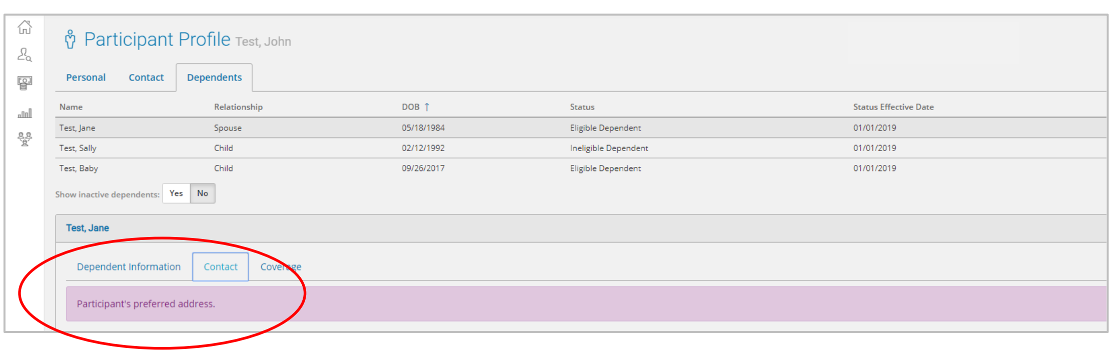
The “Dependents” tab lists the participant’s dependents reported to NTCA benefits. This includes both eligible and ineligible dependents for benefits coverage. It’s easy to see the status of the dependent under the “Status” and “Status Effective Date” columns. If the dependent is enrolled in a benefit plan(s), you will see a “Yes” under the “Enrolled” column.



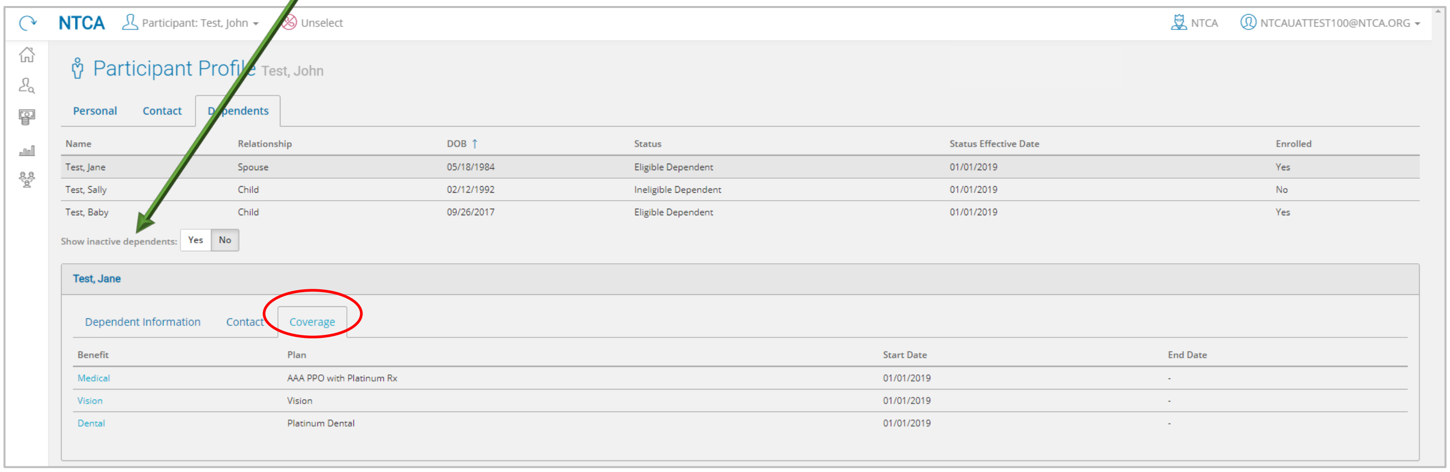
The “Basic Information” panel shows indicative data about the dependent. The data shown in the “Additional Information” panel is generally used by NTCA benefits administration personnel to administer your company benefits.



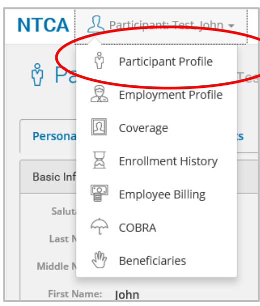
The “Contact” for dependents will automatically default to the participant’s contact information.



A summary of the dependent's benefits is provided in the "Coverage" tab. To view information about another dependent, click on the name of the dependent from the list shown at the top of the screen in the "Dependents" tab.

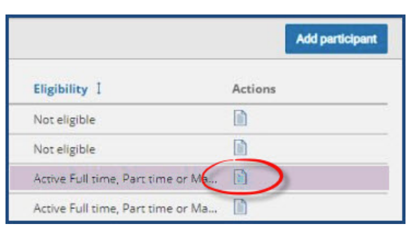


You can also access the "Participant Profile" screen from the navigation menu when you click the arrow beside the participant's name.



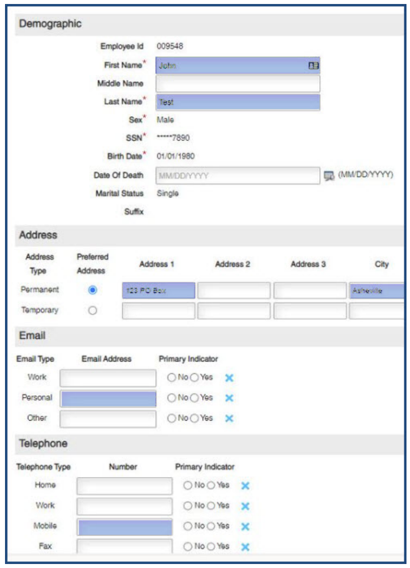
Updating Participant Information

1. **Log in** to the [*My NTCA Benefits* member portal]().
2. Click on the **Company Info** tab.
3. Use the dropdown menu to **select the company** of the participant whose information you're updating.
4. Click on the **Participants** tab.
5. Click on the participant's **profile icon** under the **Actions** column.



6. In the participant's profile, click the blue **Edit Participant** button.
7. Enter the estimated date of the participant's information change in the **Transaction Date** field.

8. **Enter the updated information** in the appropriate field(s).

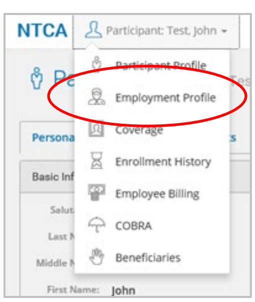


9. When done, click the blue **Next** button.
10. Your participant's information has been updated!

You will now see that the participant's profile information reflects the changes you just made. In addition, the participant will be able to see that these updates have been made to their account in the *My NTCA Benefits* participant portal.

Employment Profile

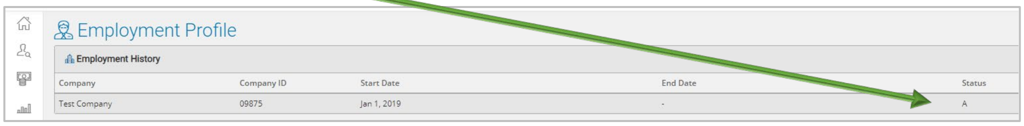
Select the "Employment Profile" icon from the participant navigation menu to view employment history and additional details.



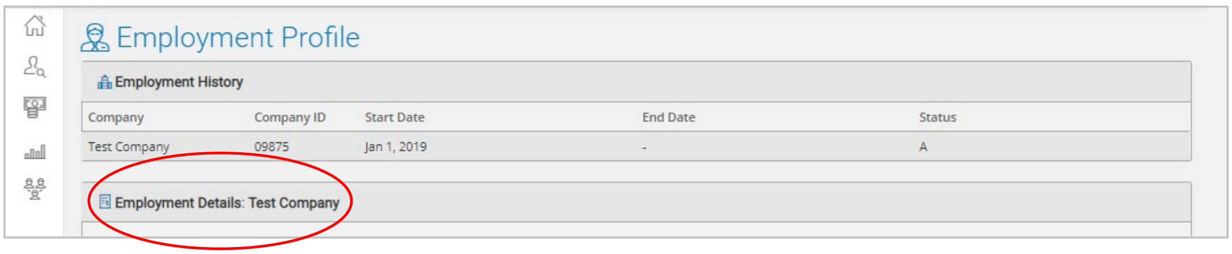
The “Employment History” panel shows the participant’s periods of employment at the company listed under the “Company” column, and an employment status associated with each company.

Employment Status Key

A = Active
R = Retired
T = Terminated
D = Deceased
S = Surviving Spouse
L = Leave of Absence
C = COBRA



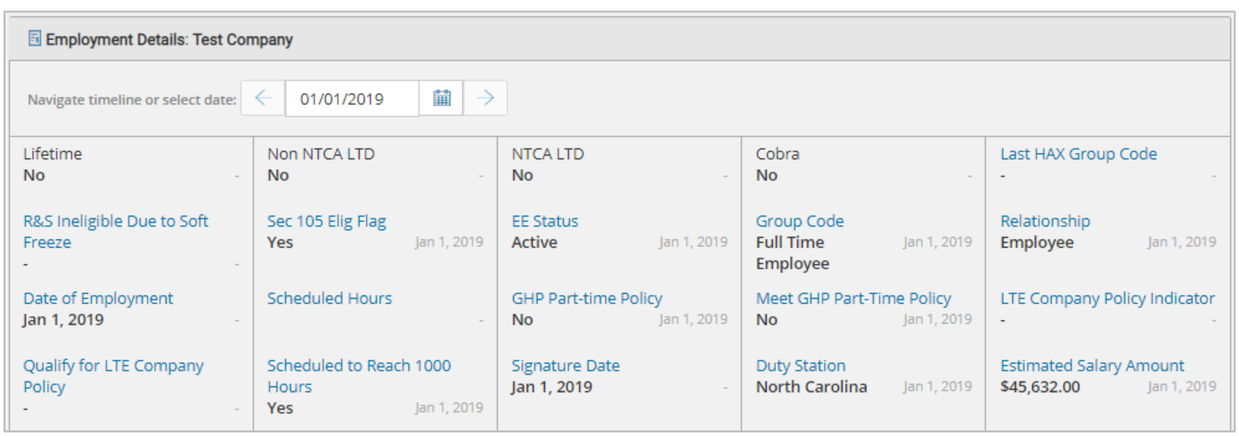
The “Employment Details” section is generally only used by NTCA benefits administration personnel.



Information on this screen includes:

<u>Employment status data</u>

The field names in blue include hyperlinks to view historical information specific to that data.



<u>Estimated Salary</u>

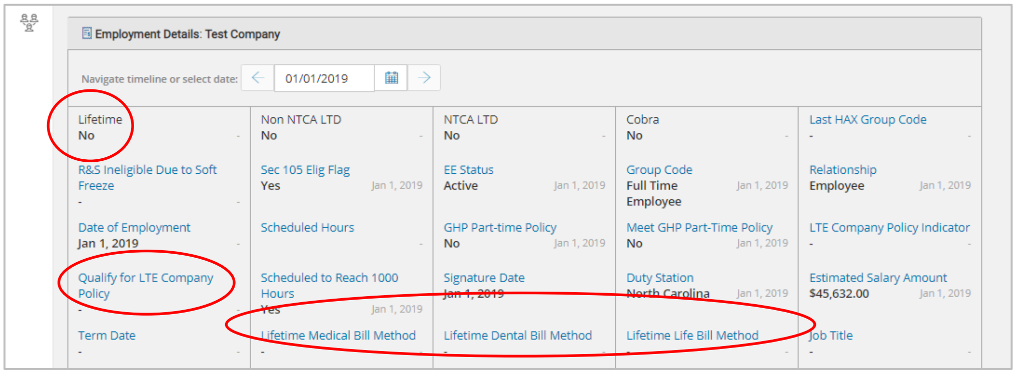
This is the amount used for billing benefit plan contributions.

<u>Part-time Policy</u>

Shows information if your company has a part-time policy for benefits eligibility, and the individual meets the company and NTCA benefit plan requirements.

<u>Lifetime Extension of Coverage</u>

If the participant is eligible and covered under a lifetime extension of GHP coverage (medical, dental and/or life), details about the extension and coverage billing (i.e., directly to the individual or through the company) is shown on this panel.



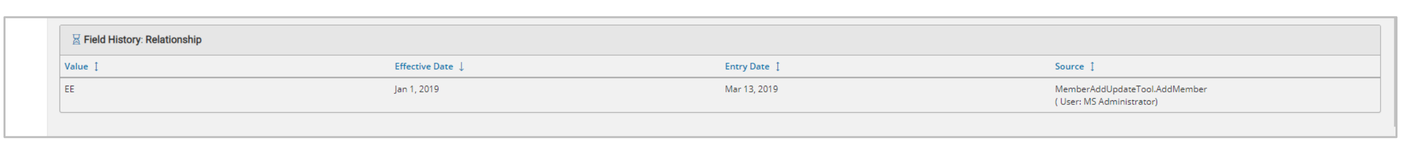
<u>GHP Wellness Connections Plan Incentives</u>

Wellness plan incentive earnings and medical plan rate reductions are displayed in this area.

<u>Disability Approval Data</u>

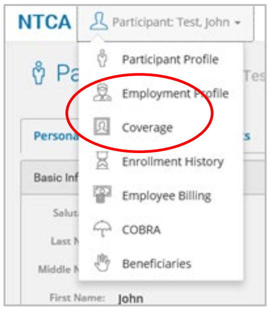
Information regarding current or prior long-term disability (LTD) for the participant can be viewed on this screen.

To review a history of when data on the "Employment Profile" was updated, just click on the field name and the history will be shown at the bottom of the page.

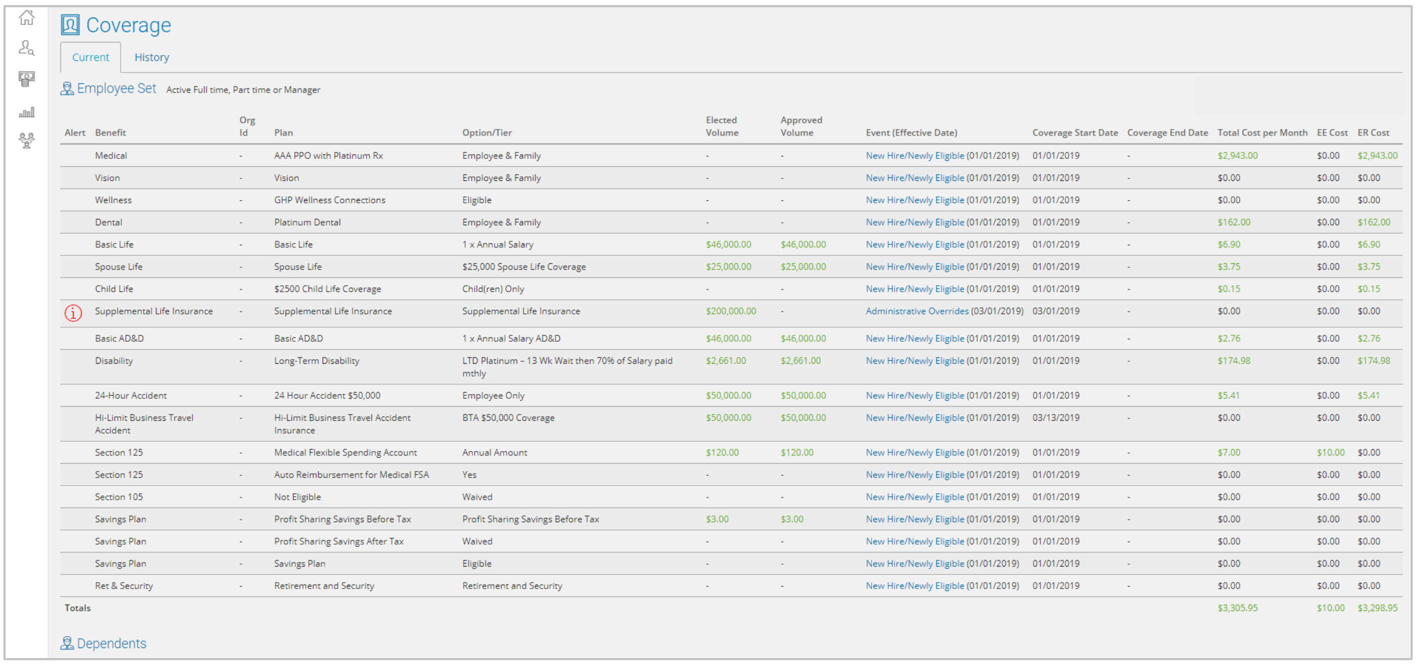


Coverage

Select the “Coverage” icon from the participant navigation menu to view current and historical coverage information for the participant and their dependent(s).



The “Current” tab provides a detailed list of all the current coverages for the participant and shows details such as the elected medical plan and tier level, coverage effective date and the total cost of the coverage(s).



Coverage

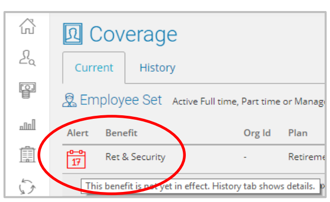
Current History

Employee Set Active Full time, Part time or Manager

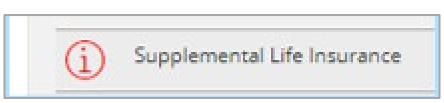
Alert	Benefit	Org Id	Plan	Option/Tier	Elected Volume	Approved Volume	Event (Effective Date)	Coverage Start Date	Coverage End Date	Total Cost per Month	EE Cost	ER Cost
	Medical	-	AAA PPO with Platinum Rx	Employee & Family	-	-	New Hire/Newly Eligible (01/01/2019)	01/01/2019	-	$2,943.00	$0.00	$2,943.00
	Vision	-	Vision	Employee & Family	-	-	New Hire/Newly Eligible (01/01/2019)	01/01/2019	-	$0.00	$0.00	$0.00
	Wellness	-	GHP Wellness Connections	Eligible	-	-	New Hire/Newly Eligible (01/01/2019)	01/01/2019	-	$0.00	$0.00	$0.00
	Dental	-	Platinum Dental	Employee & Family	-	-	New Hire/Newly Eligible (01/01/2019)	01/01/2019	-	$162.00	$0.00	$162.00
	Basic Life	-	Basic Life	1 x Annual Salary	$46,000.00	$46,000.00	New Hire/Newly Eligible (01/01/2019)	01/01/2019	-	$6.90	$0.00	$6.90
	Spouse Life	-	Spouse Life	$25,000 Spouse Life Coverage	$25,000.00	$25,000.00	New Hire/Newly Eligible (01/01/2019)	01/01/2019	-	$3.75	$0.00	$3.75
	Child Life	-	$2500 Child Life Coverage	Child(ren) Only	-	-	New Hire/Newly Eligible (01/01/2019)	01/01/2019	-	$0.15	$0.00	$0.15
(i)	Supplemental Life Insurance	-	Supplemental Life Insurance	Supplemental Life Insurance	$200,000.00	-	Administrative Overrides (03/01/2019)	03/01/2019	-	$0.00	$0.00	$0.00
	Basic AD&D	-	Basic AD&D	1 x Annual Salary AD&D	$46,000.00	$46,000.00	New Hire/Newly Eligible (01/01/2019)	01/01/2019	-	$2.76	$0.00	$2.76
	Disability	-	Long-Term Disability	LTD Platinum – 13 Wk Wait then 70% of Salary paid mthly	$2,661.00	$2,661.00	New Hire/Newly Eligible (01/01/2019)	01/01/2019	-	$174.98	$0.00	$174.98
	24-Hour Accident	-	24 Hour Accident $50,000	Employee Only	$50,000.00	$50,000.00	New Hire/Newly Eligible (01/01/2019)	01/01/2019	-	$5.41	$0.00	$5.41
	Hi-Limit Business Travel Accident	-	Hi-Limit Business Travel Accident Insurance	BTA $50,000 Coverage	$50,000.00	$50,000.00	New Hire/Newly Eligible (01/01/2019)	03/13/2019	-	$0.00	$0.00	$0.00
	Section 125	-	Medical Flexible Spending Account	Annual Amount	$120.00	$120.00	New Hire/Newly Eligible (01/01/2019)	01/01/2019	-	$7.00	$10.00	$0.00
	Section 125	-	Auto Reimbursement for Medical FSA	Yes	-	-	New Hire/Newly Eligible (01/01/2019)	01/01/2019	-	$0.00	$0.00	$0.00
	Section 105	-	Not Eligible	Waived	-	-	New Hire/Newly Eligible (01/01/2019)	01/01/2019	-	$0.00	$0.00	$0.00
	Savings Plan	-	Profit Sharing Savings Before Tax	Profit Sharing Savings Before Tax	$3.00	$3.00	New Hire/Newly Eligible (01/01/2019)	01/01/2019	-	$0.00	$0.00	$0.00
	Savings Plan	-	Profit Sharing Savings After Tax	Waived	-	-	New Hire/Newly Eligible (01/01/2019)	01/01/2019	-	$0.00	$0.00	$0.00
	Savings Plan	-	Savings Plan	Eligible	-	-	New Hire/Newly Eligible (01/01/2019)	01/01/2019	-	$0.00	$0.00	$0.00
	Ret & Security	-	Retirement and Security	Retirement and Security	-	-	New Hire/Newly Eligible (01/01/2019)	01/01/2019	-	$0.00	$0.00	$0.00
Totals										$3,305.95	$10.00	$3,298.95

Dependents

If a participant’s coverage is not yet effective, a red alert icon will appear beside the benefit plan.



The red circle with an “i” indicates the coverage requires NTCA review/approval. You will usually see this with life and/or disability coverages when the participant is considered a late enrollee or for supplemental life enrollments that require additional approval.



Coverage Volume

If the company offers benefit plans with coverage volumes such as the NTCA Group Life plan, the volume of coverage elected and approved can be viewed from this tab.

Coverage

Current | History

Employee Set Active Full time, Part time or Manager

Alert	Benefit	Org Id	Plan	Option/Tier	Elected Volume	Approved Volume
	Medical	-	AAA PPO with Platinum Rx	Employee & Family	-	-
	Vision	-	Vision	Employee & Family	-	-
	Wellness	-	GHP Wellness Connections	Eligible	-	-
	Dental	-	Platinum Dental	Employee & Family	-	-
	Basic Life	-	Basic Life	1 x Annual Salary	$46,000.00	$46,000.00
	Spouse Life	-	Spouse Life	$25,000 Spouse Life Coverage	$25,000.00	$25,000.00
	Child Life	-	$2500 Child Life Coverage	Child(ren) Only	-	-
ⓘ	Supplemental Life Insurance	-	Supplemental Life Insurance	Supplemental Life Insurance	$200,000.00	-

Coverage volume is also used to display contribution percentage elections for Savings Plan participants. This example shows $3.00 (which represents a 3% contribution.)

Savings Plan	-	Profit Sharing Savings Before Tax	Profit Sharing Savings Before Tax	$3.00	$3.00	New Hire/Newly Eligible (01/01/2019)	01/01/2019	-	$0.00	$0.00	$0.00
Savings Plan	-	Profit Sharing Savings After Tax	Waived	-	-	New Hire/Newly Eligible (01/01/2019)	01/01/2019	-	$0.00	$0.00	$0.00
Savings Plan	-	Savings Plan	Eligible	-	-	New Hire/Newly Eligible (01/01/2019)	01/01/2019	-	$0.00	$0.00	$0.00

Benefit Cost

Total Cost per Month	EE Cost	ER Cost
$2,943.00	$0.00	$2,943.00
$0.00	$0.00	$0.00

Here's some quick tips when you view the cost information from the "Coverage" tab:

- Costs are shown in monthly amounts.
- Most coverages will show a dollar amount under the "ER Cost" ("Employer Cost") column because NTCA bills the member company for the monthly contributions.
- Sometimes a dollar amount is shown under "EE Cost" ("Employee Cost"). This typically occurs when the participant enrolls in additional coverage such as Supplemental Life and AD&D coverages.
- Retirement & Security (R&S) Program costs are not included in the "Coverage" tab because NTCA uses an 8-month billing structure for this program. The *My NTCA Benefits* portal is designed to present coverage costs for a 12-month billing structure. R&S Program billing information is in the "Company Billing" area of the portal and from the Employee Billing icon.

Event (Effective Date)

Event (Effective Date)	Coverage Start Date
New Hire/Newly Eligible (01/01/2019)	01/01/2019

The “Event” column provides a description of changes processed for the participant. These changes may result in an update or change to benefit plan coverage(s). Events include:

- New Hire/Newly Eligible
- Birth/Adoption/Legal Guardianship
- Marriage
- Divorce
- Beneficiary Change
- Voluntary Waiver

An “Administrative Override” event is used by NTCA benefits administration personnel when appropriate to apply certain approved changes to a participant’s coverage record.

Event History

Click on the “Event”.

Coverage

Current | History

Employee Set Active Full time, Part time or Manager

Alert	Benefit	Org Id	Plan	Option/Tier	Elected Volume	Approved Volume	Event (Effective Date)	Coverage Start Date
	Medical	-	AAA PPO with Platinum Rx	Employee & Family	-	-	New Hire/Newly Eligible (01/01/2019)	01/01/2019

Dependent Coverage Information

A summary of each dependent’s coverage is found at the bottom of the “Coverage” screen. Use the “View By” buttons to sort the records by covered dependent or by benefit plan. If a dependent’s coverage is not yet effective, a red alert icon will appear beside the benefit plan.

Basic AD&D	-	Basic AD&D	1 x Annual Salary AD&D	$46,000.00	$46,000.00	New Hire/Newly Eligible (01/01/2019)	01/01/2019	-	$2.76	$0.00	$2.76
Disability	-	Long-Term Disability	LTD Platinum – 13 Wk Wait then 70% of Salary paid mthly	$2,661.00	$2,661.00	New Hire/Newly Eligible (01/01/2019)	01/01/2019	-	$174.98	$0.00	$174.98
24-Hour Accident	-	24 Hour Accident $50,000	Employee Only	$50,000.00	$50,000.00	New Hire/Newly Eligible (01/01/2019)	01/01/2019	-	$5.41	$0.00	$5.41
Hi-Limit Business Travel Accident	-	Hi-Limit Business Travel Accident Insurance	BTA $50,000 Coverage	$50,000.00	$50,000.00	New Hire/Newly Eligible (01/01/2019)	03/13/2019	-	$0.00	$0.00	$0.00
Section 125	-	Medical Flexible Spending Account	Annual Amount	$120.00	$120.00	New Hire/Newly Eligible (01/01/2019)	01/01/2019	-	$7.00	$10.00	$0.00
Section 125	-	Auto Reimbursement for Medical FSA	Yes	-	-	New Hire/Newly Eligible (01/01/2019)	01/01/2019	-	$0.00	$0.00	$0.00
Section 105	-	Not Eligible	Waived	-	-	New Hire/Newly Eligible (01/01/2019)	01/01/2019	-	$0.00	$0.00	$0.00
Savings Plan	-	Profit Sharing Savings Before Tax	Profit Sharing Savings Before Tax	$3.00	$3.00	New Hire/Newly Eligible (01/01/2019)	01/01/2019	-	$0.00	$0.00	$0.00
Savings Plan	-	Profit Sharing Savings After Tax	Waived	-	-	New Hire/Newly Eligible (01/01/2019)	01/01/2019	-	$0.00	$0.00	$0.00
Savings Plan	-	Savings Plan	Eligible	-	-	New Hire/Newly Eligible (01/01/2019)	01/01/2019	-	$0.00	$0.00	$0.00
Ret & Security	-	Retirement and Security	Retirement and Security	-	-	New Hire/Newly Eligible (01/01/2019)	01/01/2019	-	$0.00	$0.00	$0.00
Totals									$3,305.95	$10.00	$3,298.95

Dependents

View By: Dependent Benefit

Test, Jane

Benefit	Plan	Start Date	End Date
Medical	AAA PPO with Platinum Rx	01/01/2019	-
Vision	Vision	01/01/2019	-
Dental	Platinum Dental	01/01/2019	-

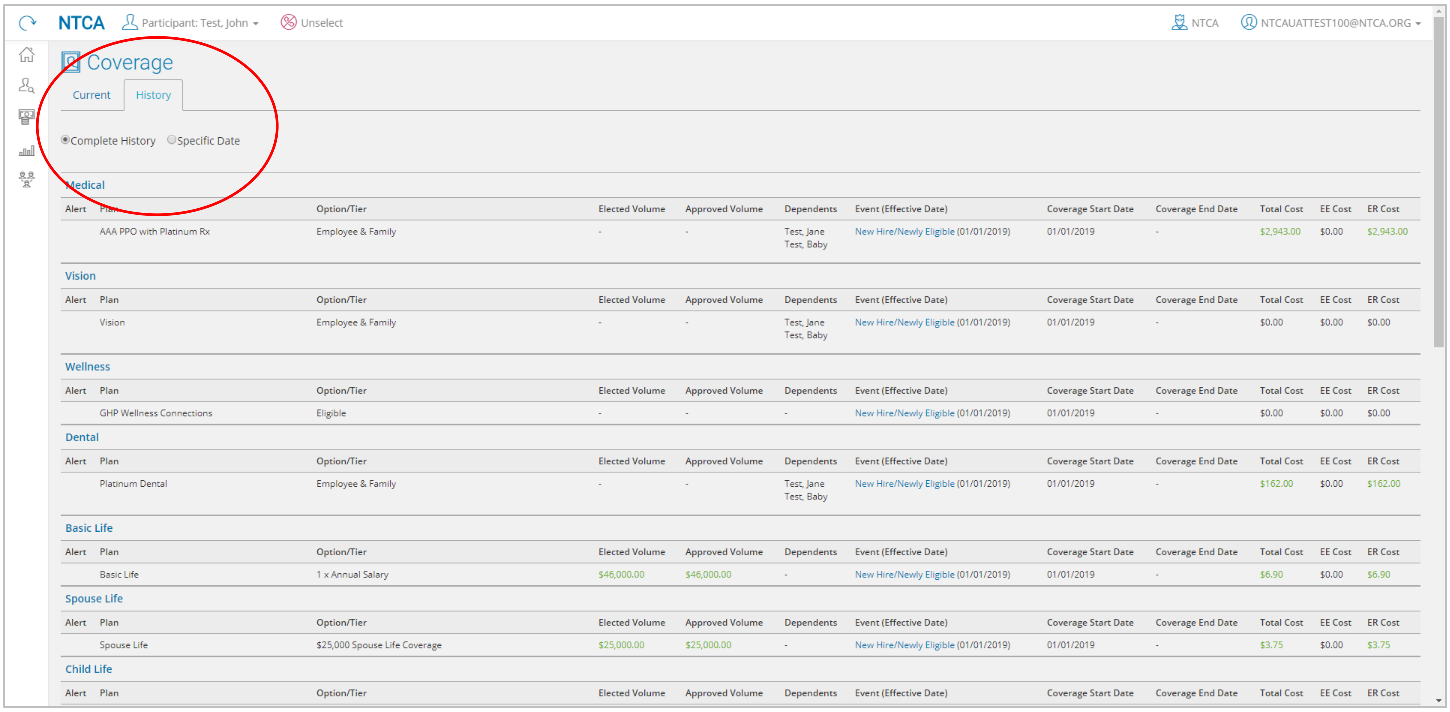
Test, Baby

Benefit	Plan	Start Date	End Date
Medical	AAA PPO with Platinum Rx	01/01/2019	-
Vision	Vision	01/01/2019	-
Dental	Platinum Dental	01/01/2019	-
Child Life	$2500 Child Life Coverage	01/01/2019	-

Coverage History

The “History” tab provides a summary of changes to the participant’s active coverage(s), including annual open enrollment and family tier level changes. Dependents impacted by these changes are shown by name under the “Dependents” column.

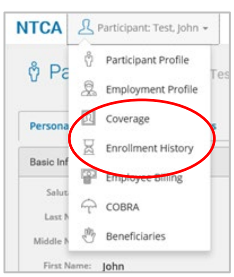
This screen will also show coverage(s) that have an effective date other than the current date you are viewing the record. For example, if the participant has a coverage effective next month, the history tab will show the date their current coverage will end and the date when the new coverage will begin.



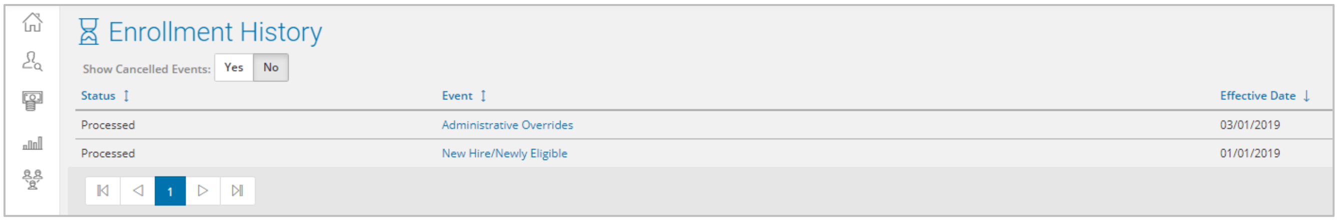
Coverage history can be viewed in its entirety or by a specific date. Select the desired option using the “Complete History” or “Specific Date” buttons.

Enrollment History

Select the “Enrollment History” icon from the participant navigation menu to view events processed for the participant.



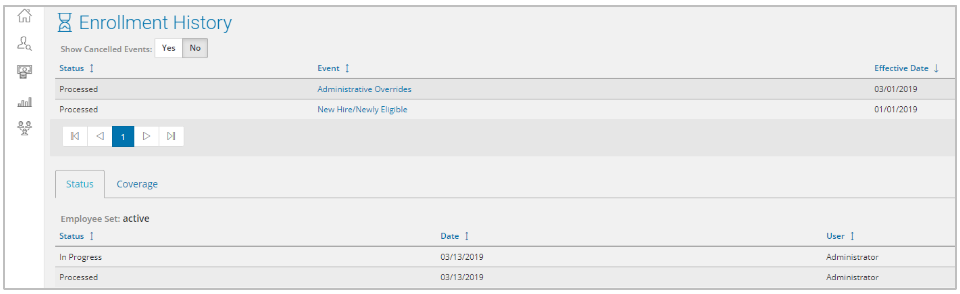
A summary list of events will be displayed with an effective date and status. Some events will show “In Progress” until a later activity closes the event, such as the annual open enrollment for GHP elections.



Most history records for benefit plan participants enrolled in the NTCA benefit plan(s) prior to January 2019 will show events called “Conversion” or “Recalc”. These records result from NTCA’s conversion from our former billing and enrollment system to the *My NTCA Benefits* portal.

<u>Enrollment History Status</u>

Details of an event can be viewed by selecting the specific event. This is a quick way to see if the event is in process or has been completed (i.e., processed.)

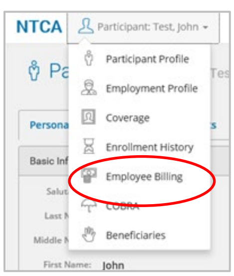


<u>Enrollment History Coverage</u>

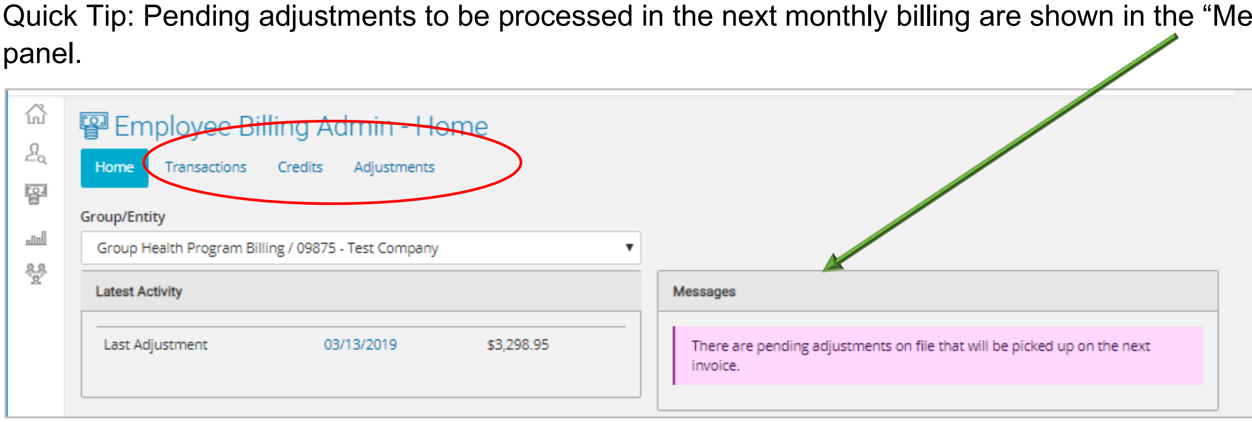
The “Coverage” tab shows the coverage options available, elected or waived by the participant. This is the same information available from the “Coverage” icon.

Employee Billing

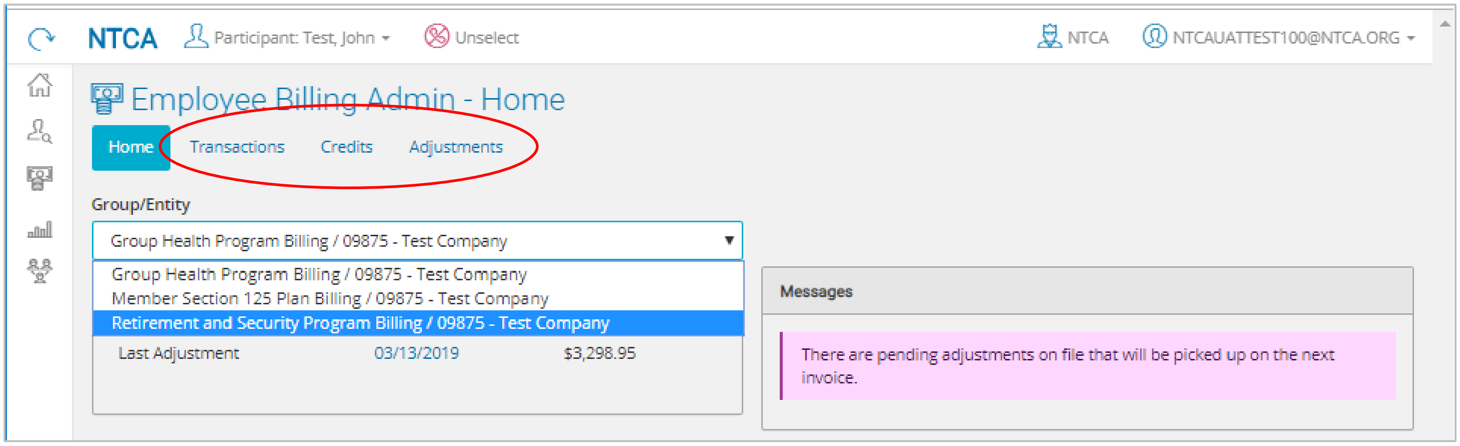
Select the “Employee Billing” icon from the participant navigation menu to access participant billing data. This provides access to the same participant-level billing information available in “Group Billing”.



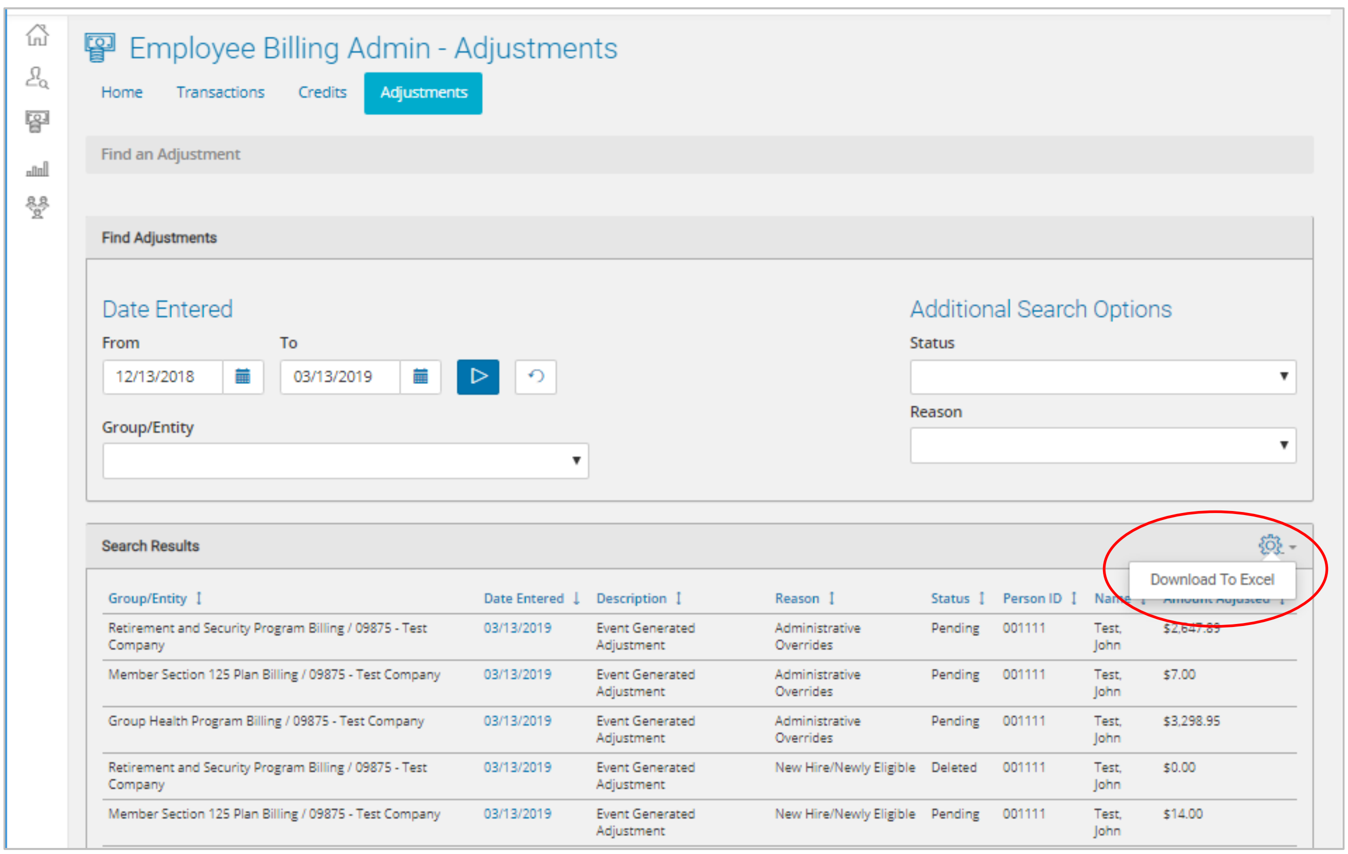
Quick Tip: Pending adjustments to be processed in the next monthly billing are shown in the “Messages” panel.



Choose the billing group from the dropdown menu and search in the “Transactions”, “Credits” and “Adjustments” tabs as found in the “Group Billing” screens.

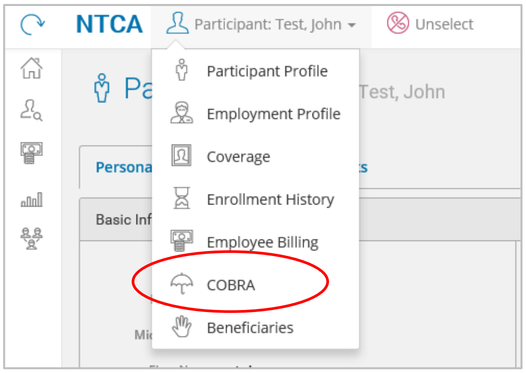


Download your search results by clicking the gear icon and select “Download Results to Excel.” The file will open in a separate window.



COBRA

Select the COBRA icon from the participant navigation menu to view a summary of COBRA qualifying events for the participant and their dependent(s).



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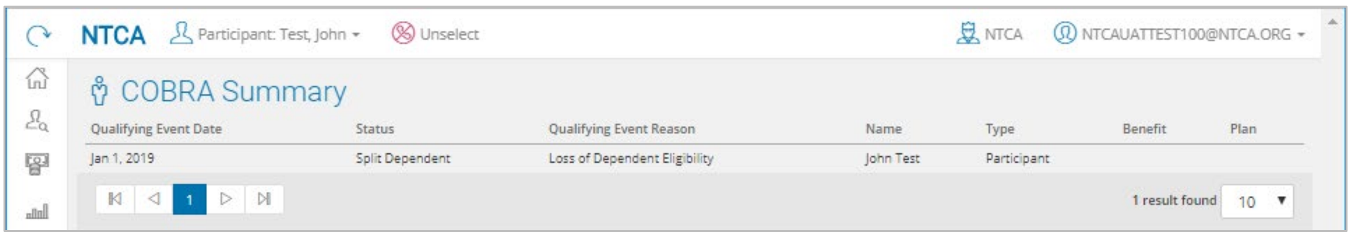
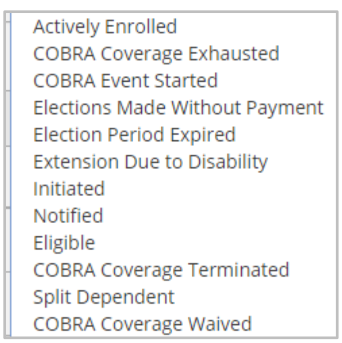


This screen includes:

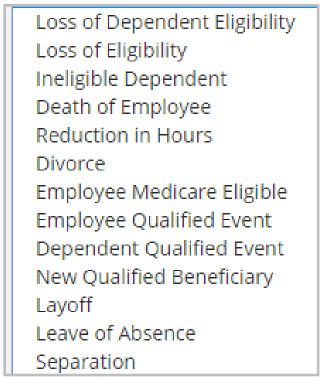
<u>Qualifying Event Date</u>
The effective date of COBRA coverage if elected by the beneficiary.

<u>Status</u>
The current status of COBRA coverage and reflects one of these status descriptions.


Actively Enrolled
COBRA Coverage Exhausted
COBRA Event Started
Elections Made Without Payment
Election Period Expired
Extension Due to Disability
Initiated
Notified
Eligible
COBRA Coverage Terminated
Split Dependent
COBRA Coverage Waived

Quick Tip: “Split Dependent” means the COBRA event is due to a dependent losing eligibility for coverage.

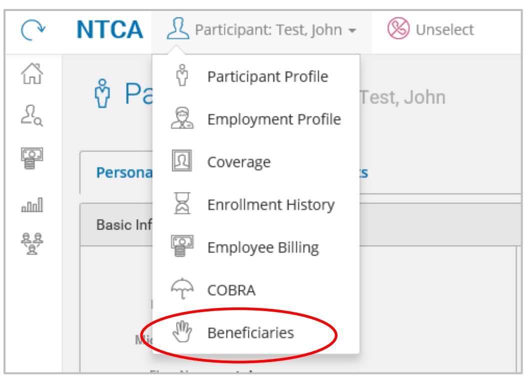
Qualifying Event Reason
The reason(s) a COBRA extension of NTCA coverage is being offered and will show one of these reasons.



If COBRA is elected by a dependent, NTCA benefits administration personnel will establish a separate record for the dependent so COBRA continuation coverage is shown under that person's ID number.

Beneficiaries

Select the "Beneficiaries" icon from the participant navigation menu to view beneficiary designations made by the participant for NTCA benefit plans/coverages that provide a benefit at death or dismemberment. These coverages include Group Life, Supplemental Life, Accidental Death & Dismemberment (AD&D), Supplemental AD&D, 24-hour Accident, Hi-Limit Business Travel, Retirement & Security Program and Savings Plan.



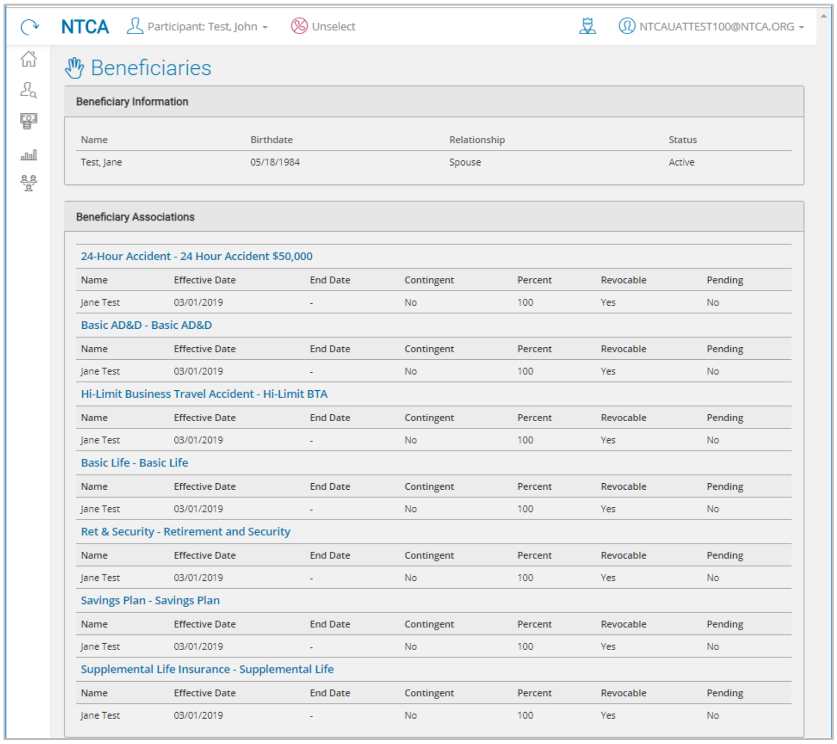
The Beneficiaries screen includes:

Beneficiary Information:
Shows a list of the beneficiary name(s), birthdates, relationship to the participant and the status of the beneficiary designation.

Beneficiary Associations

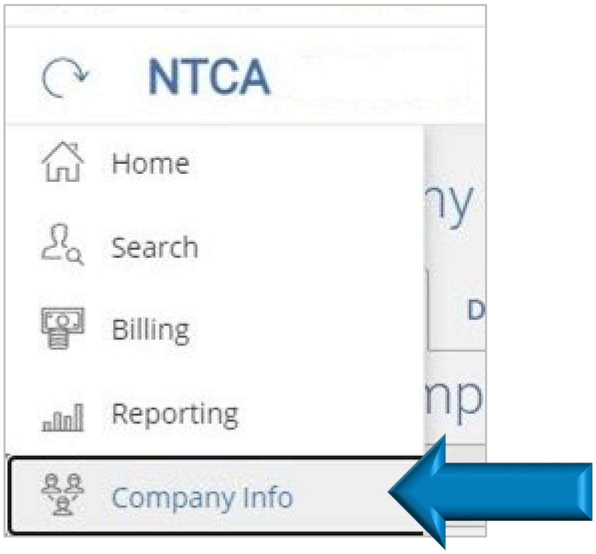
Lists the beneficiary designations by benefit plan, the effective date of the designation, whether the named beneficiary is a primary of contingent designation and the beneficiary designation percentage.

Quick Tip: The information found on this screen does not represent any benefit payments that may have been distributed or will be distributed. It is a record of the beneficiary designation made by the participant.



Add a New Employee or Director

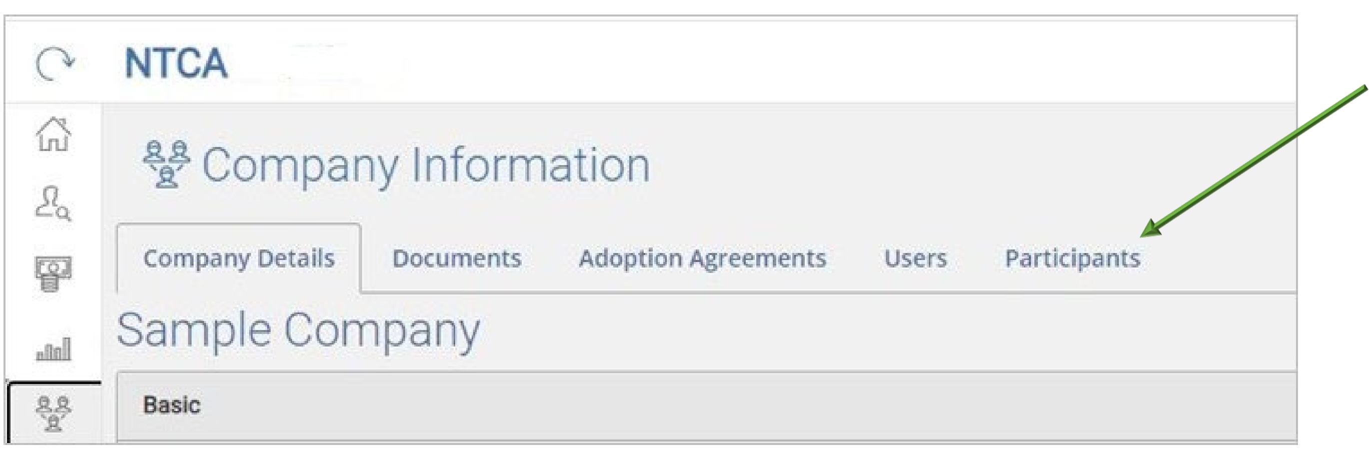
This section will explain the steps to add a newly hired employee or newly appointed board member. From the home page, select the “Company Info” icon from the left side of the screen.



This panel will appear if you manage benefits for multiple companies. Select the company associated with the new employee or director. If you manage benefits for only one company then the Company Info page will automatically open.

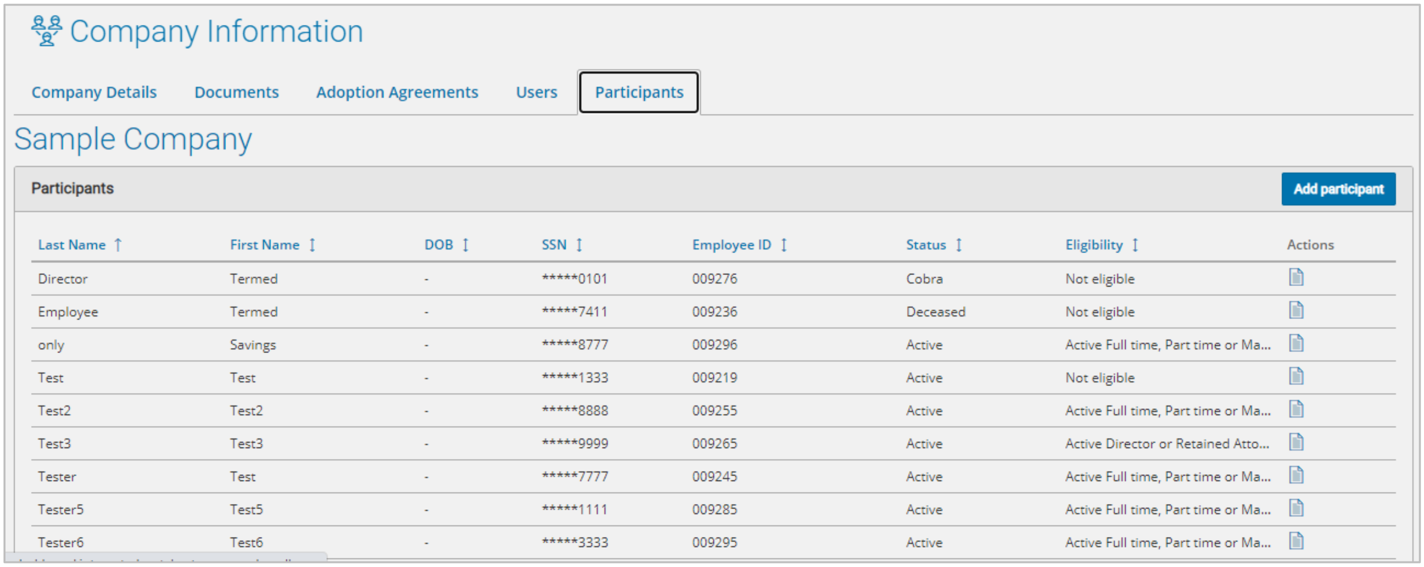
The following example shows how to add a participant to Sample Company #09877.

Select the “Participants” tab.

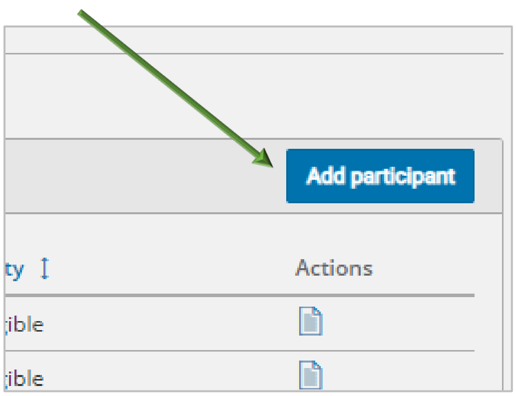


The “Participants” tab will display all your current and former employees as well as board members if your company provides board coverage.

Participants can easily be sorted by clicking on any of the column headings – Last Name, First Name, DOB, SSN, Employee ID, Status or Eligibility.

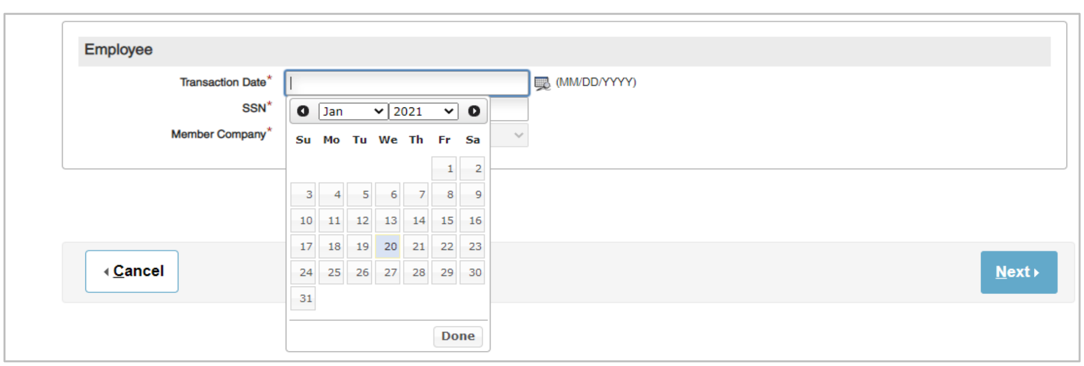


To begin the process of adding a new employee or board member, click the “Add Participant” button.

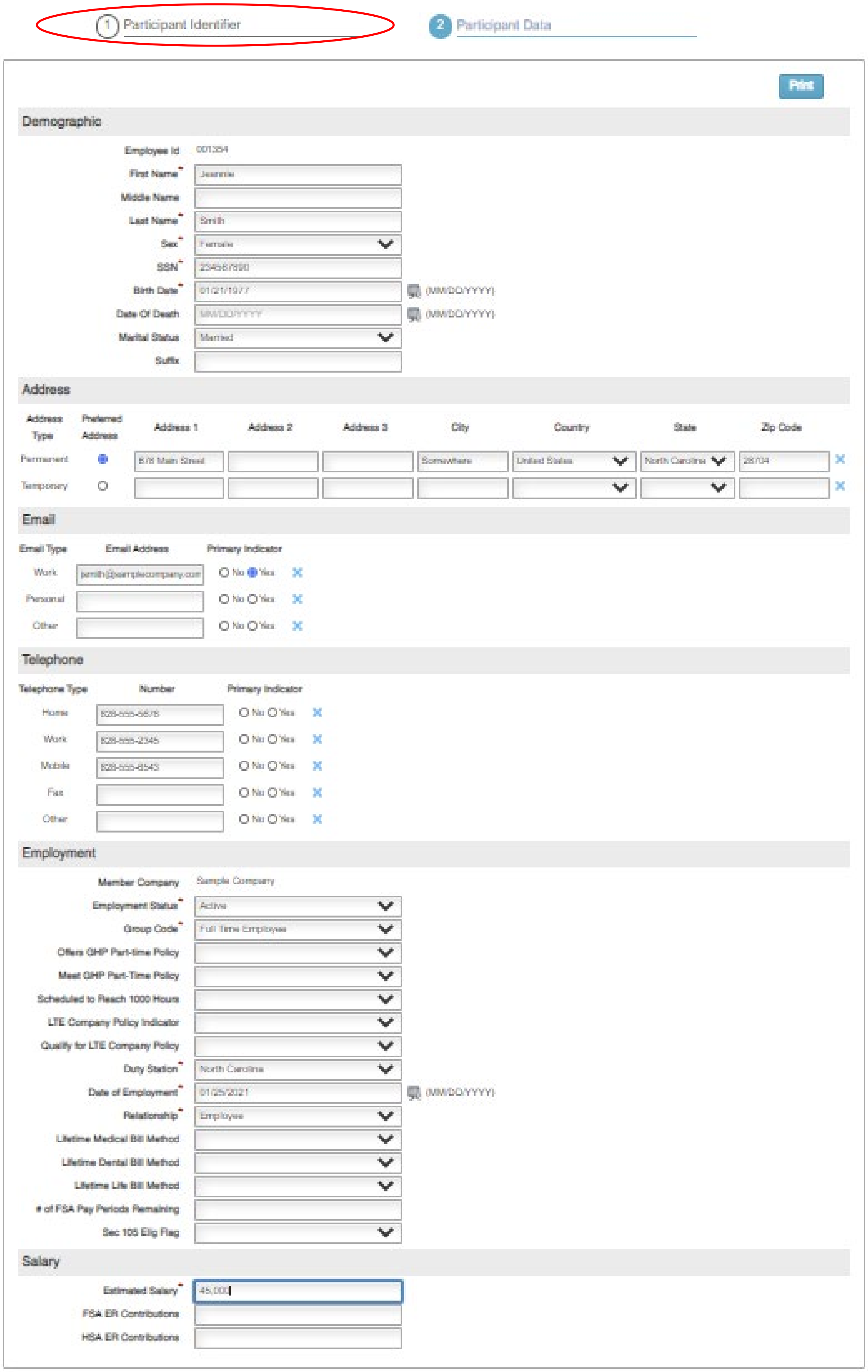


The first screen to appear will request the “Transaction Date” and “SSN”. Member Company will auto populate. The “Transaction Date” is the new employee’s **hire date** or the new board member’s **appointment date**. Use the calendar to select the appropriate date. Then click Next.

In this example, Jeannie Smith’s hire date is January 25, 2021, and her SSN is 234-56-7890.



The “Participant Identifier” screen will then open. All required fields are shown with a red asterisk. The “Employee ID” number is assigned by NTCA benefits and is automatically populated.

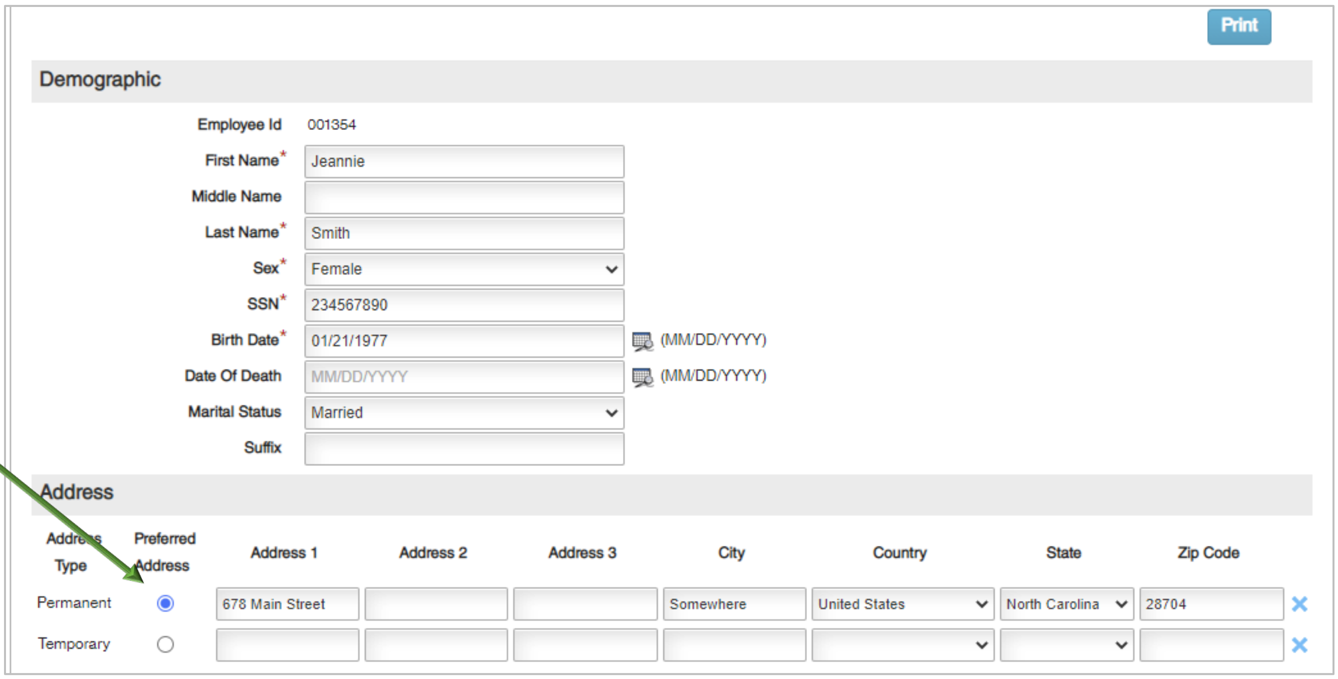


“Demographic” Section

In this section you will enter the employee’s or board member’s “First Name”, “Last Name”, “Sex”, “SSN” and “Birth Date”. Middle name is important to differentiate employees who may share the same name (i.e., John Smith). It is best to enter “Marital Status” if the information is available. A drop-down menu provides input options of Single, Married, Widowed, Divorced or Separated.

“Address” Section

Although these fields are not required, it is important that the new employee or board member has a “Permanent Address” entered and the “Preferred Address” button selected. This ensures the address record is processed correctly in our enrollment records.



Print

Demographic

Employee Id	001354
First Name*	Jeannie
Middle Name	
Last Name*	Smith
Sex*	Female
SSN*	234567890
Birth Date*	01/21/1977 (MM/DD/YYYY)
Date Of Death	MM/DD/YYYY (MM/DD/YYYY)
Marital Status	Married
Suffix	

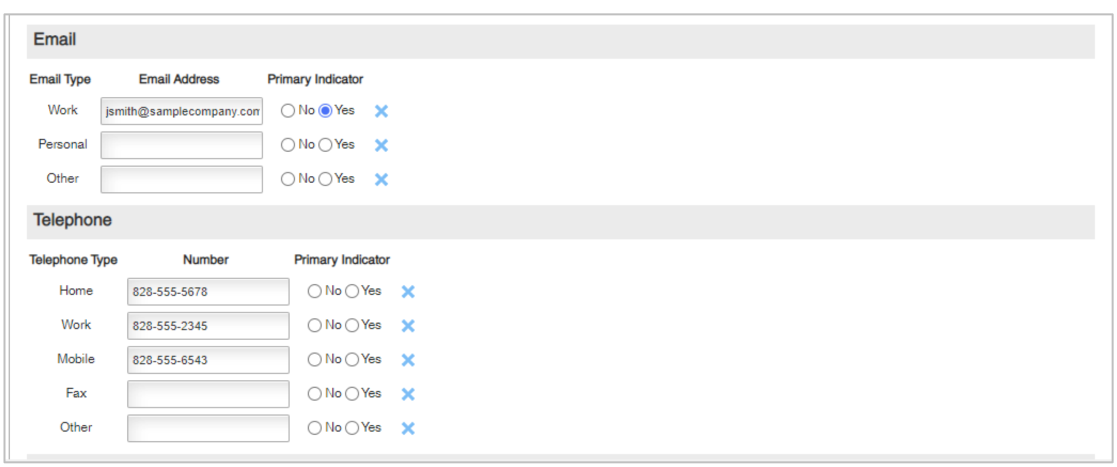
Address

Address Type	Preferred Address	Address 1	Address 2	Address 3	City	Country	State	Zip Code
Permanent	●	678 Main Street			Somewhere	United States	North Carolina	28704
Temporary	○							

“Email” and “Telephone” Sections

Email and telephone information does not need to be completed at this time. Your new participant will provide this information when they enroll in your company-provided benefit plans using the *My NTCA Benefits* participant portal.

Note: The preferred email address is part of the participant’s registration process and will be used as part of a password reset function, if needed.



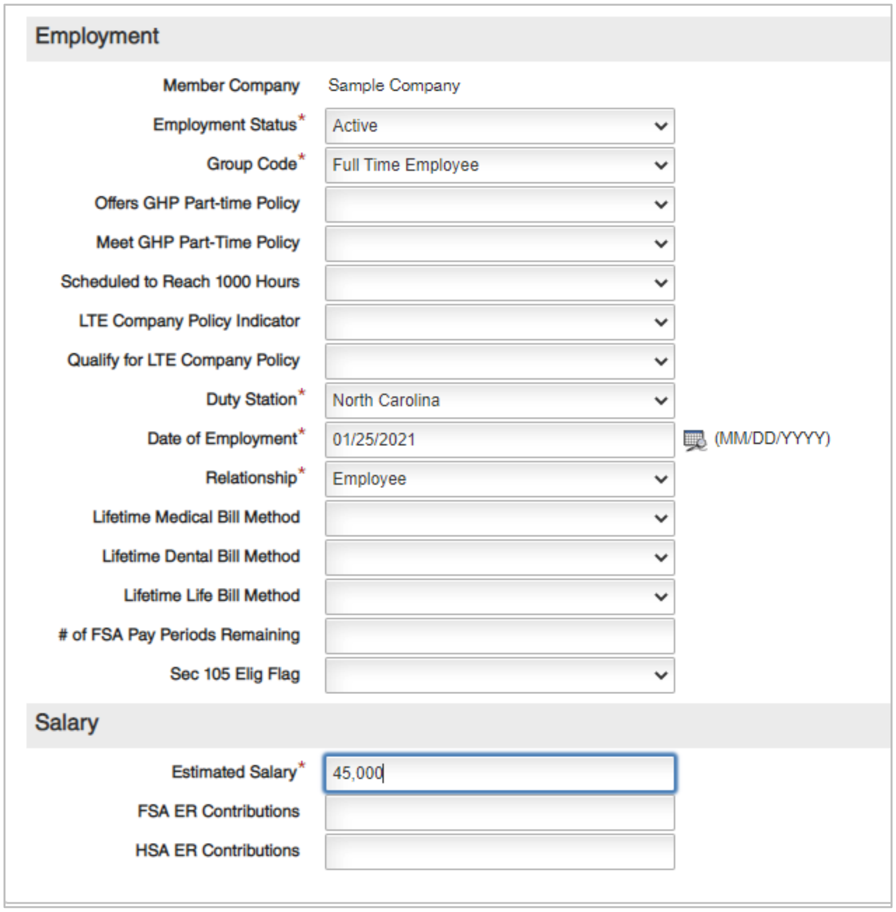
Email

Email Type	Email Address	Primary Indicator
Work	jsmith@samplecompany.com	○ No ● Yes
Personal		○ No ○ Yes
Other		○ No ○ Yes

Telephone

Telephone Type	Number	Primary Indicator
Home	828-555-5678	○ No ○ Yes
Work	828-555-2345	○ No ○ Yes
Mobile	828-555-6543	○ No ○ Yes
Fax		○ No ○ Yes
Other		○ No ○ Yes

“Employment” and “Salary” Sections



Required Fields

Employment Status: Select “Active”.

Group Code: Choose one of the following four options. The remaining choices are for internal use by NTCA benefits.

- Full-time Employee
- Manager – Choose this selection if the manager will have the option to enroll in 24-Hour Accident and/or Hi-Limit Business Travel Accident coverage. The schedule of benefits for the General Manager is different than for other employees.
- Director/Attorney
- Part-time Employee

Duty Station: Select the state of the primary work location for the new participant. Typically, this is your company’s main office location unless your company has either multiple office locations or satellite offices.

Date of Employment: This must be the same date as the “Transaction Date” entered on the previous screen. In our example, Jeannie Smith’s new hire date is January 25, 2021.

Relationship: Select either “Director or Attorney” or “Employee”

Estimated Salary: Enter the annualized salary for the new participant based on a full 12-month period – do not prorate it based on hire date. It is a good practice to enter $1 for newly hired Directors instead of $0.

Other Fields

Offers GHP Part-Time Policy: Select “Yes” or “No” depending upon whether your company offers the NTCA Group Health Program and has a part-time policy that applies to eligibility for that benefit plan.

Meet GHP Part-Time Policy: Select “Yes” only if the part-time employee meets your company’s established policy.

Scheduled to Reach 1000 Hours: Select “Yes” and also select “Yes” for “Offers GHP Part-Time Policy” if the new participant is scheduled to reach 1,000 hours. Participants who are scheduled to reach 1,000 hours are eligible for the R&S Program and/or Savings Plan and this ensures the record is processed correctly in the eligibility and enrollment system.

LTE Company Policy Indicator: Leave blank – this field is used for retirees only.

Qualify for LTE Company Policy*:* Leave blank – this field is used for retirees only.

Lifetime Medical Bill Method: Leave blank – this field is used for retirees only.

Lifetime Dental Bill Method: Leave blank – this field is used for retirees only.

Lifetime Life Bill Method: Leave blank – this field is used for retirees only.

# of FSA Pay Periods Remaining: Calculate by the number of pay periods remaining in the year. For example, if Jeannie Smith’s hire date is January 25, 2021, and payroll is processed monthly, 11 is entered since there are 11 pay periods remaining in the year.

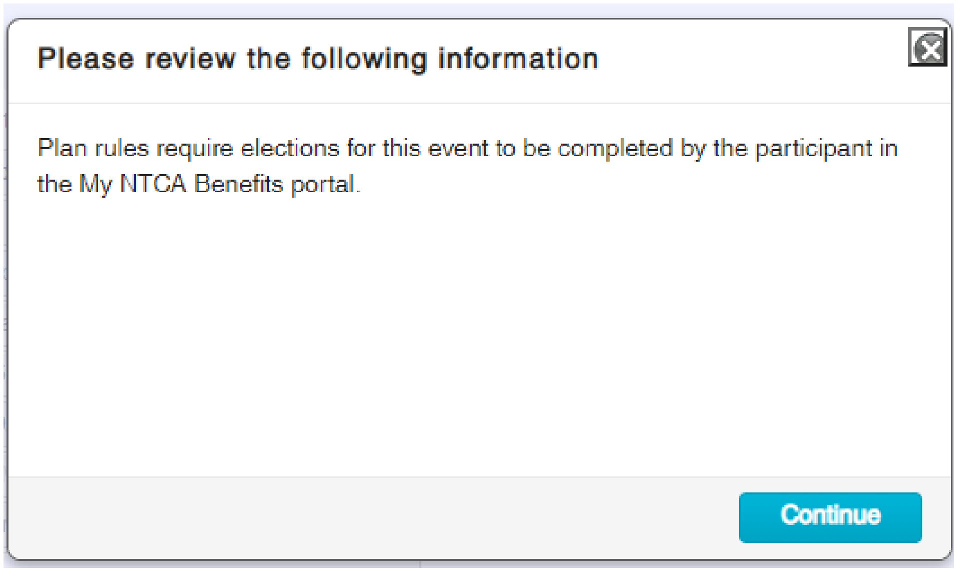
Sec 105 Elig Flag: “Not Eligible” should be selected unless your new hire is an exception. For example, if a company offers Section 105 for the Single A High-Deductible Health Plan, but the participant has an HSA plan then they are no longer eligible for the Section 105 plan. Any other plan options your company may offer that are eligible for Section 105 will automatically be recognized by the system.

FSA ER Contributions: If your company makes contributions to the Flexible Spending Account for employees, then you will enter the prorated annualized amount in this field. Using an example of Jeannie Smith, with 11 pay periods remaining in the year and a company contribution of $20 per pay period, $220 would be entered into this field.

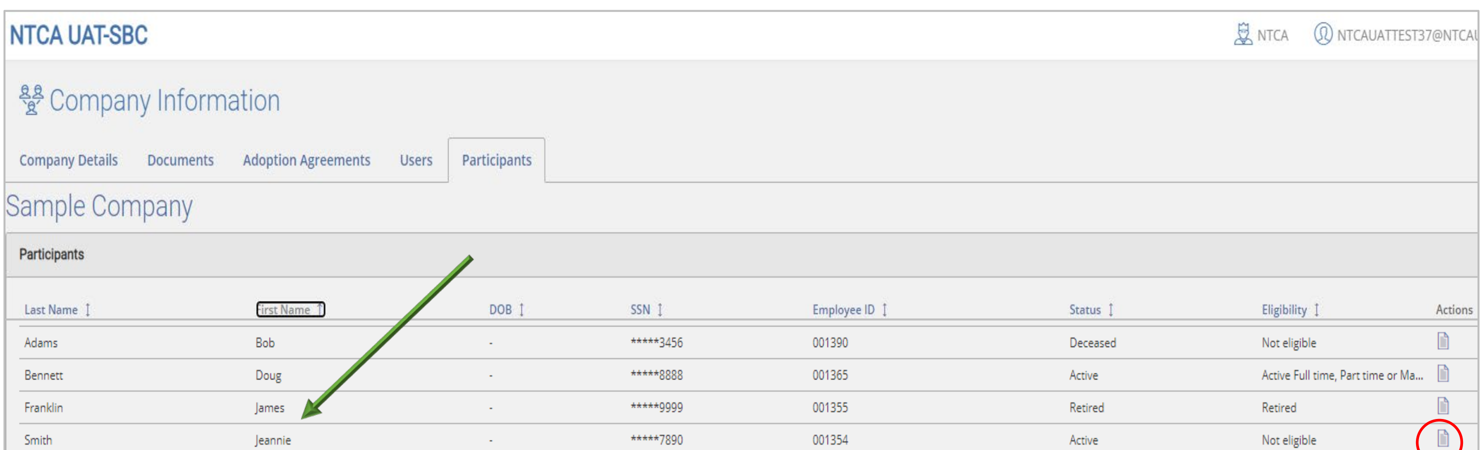
HSA ER Contributions: If your company makes contributions to an Healthcare Savings Account for employees, you will enter the prorated annualized amount in this field.

Once you have entered all the information into the “Participant Identifier” screen, click “Next”. The following message will appear on your screen as confirmation that you have completed all the steps to add the new participant to NTCA’s benefits records. This also serves as a reminder that your new participant will need to complete their enrollment online using the *My NTCA Benefits* portal.

Click the “Continue” button.



The new participant will now show in your list of participants.



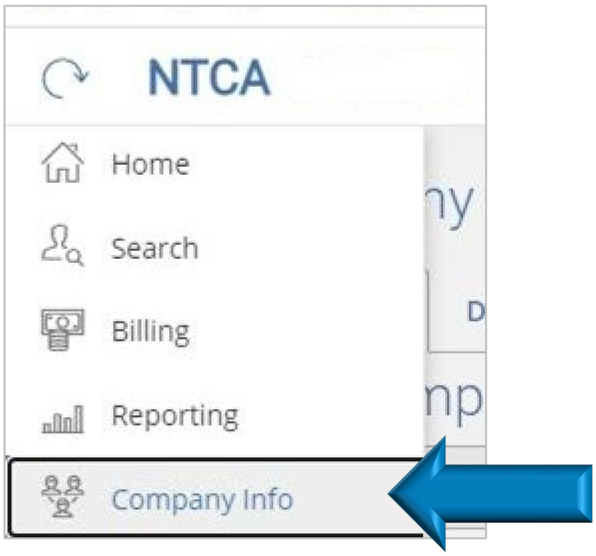
Quick Tip: It is a good practice to review the newly added participant’s record to ensure all information is accurate.
To review the participant’s record, click the “Actions” icon to open their record.

After you have reviewed the new participant’s record, please remember to sign out of the portal. Also, notify your new participant that they will need to complete their enrollment online and can input their selections as early as the next day after you complete your piece of the process.

Reporting Employment Changes

This section will show you how to report employment changes using the *My NTCA Benefits* portal. Employment changes include changing from full-time or part-time status, terminations, retirements, and death.

Regardless of the employment change, the steps to begin the process are the same. From the home page, select the "Company Info" icon from the left side of the screen.



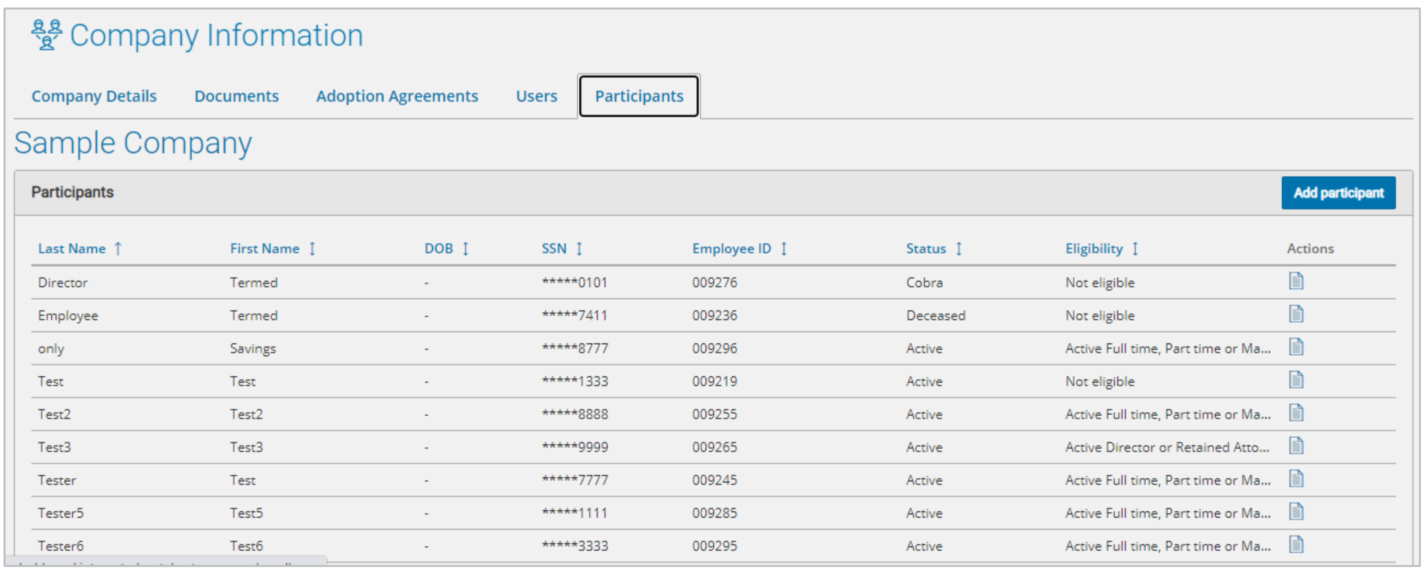
This panel will appear if you manage benefits for multiple companies. If you manage benefits for only one company, then the "Company Info" page will automatically open.

To illustrate the various employment changes covered in this section, we will use Sample Company #09877.

Select the “Participants” tab

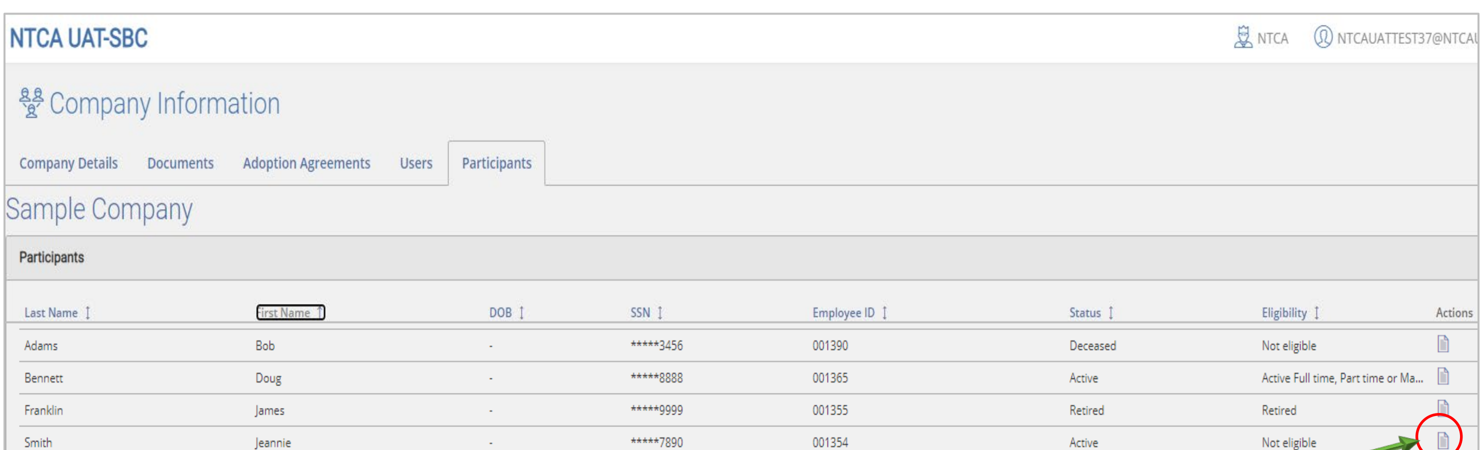
The “Participants” tab will display all your current and former employees as well as board members if your company provides board coverage.

Participants can easily be sorted by clicking on any of the column headings – Last Name, First Name, DOB, SSN, Employee ID, Status or Eligibility.



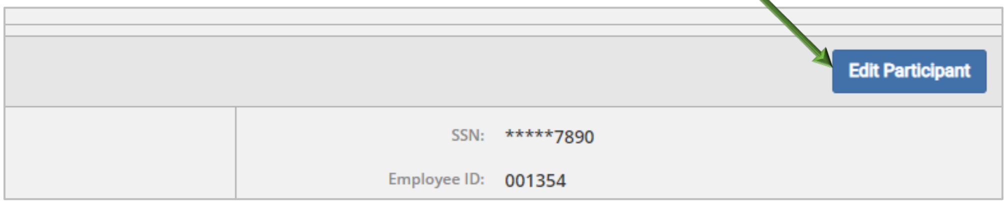
Last Name	First Name	DOB	SSN	Employee ID	Status	Eligibility	Actions
Director	Termed	-	*****0101	009276	Cobra	Not eligible	
Employee	Termed	-	*****7411	009236	Deceased	Not eligible	
only	Savings	-	*****8777	009296	Active	Active Full time, Part time or Ma...	
Test	Test	-	*****1333	009219	Active	Not eligible	
Test2	Test2	-	*****8888	009255	Active	Active Full time, Part time or Ma...	
Test3	Test3	-	*****9999	009265	Active	Active Director or Retained Atto...	
Tester	Test	-	*****7777	009245	Active	Active Full time, Part time or Ma...	
Tester5	Test5	-	*****1111	009285	Active	Active Full time, Part time or Ma...	
Tester6	Test6	-	*****3333	009295	Active	Active Full time, Part time or Ma...	

Select the “Actions” icon beside the employee’s or director’s name to open the “Participant Profile” screen.

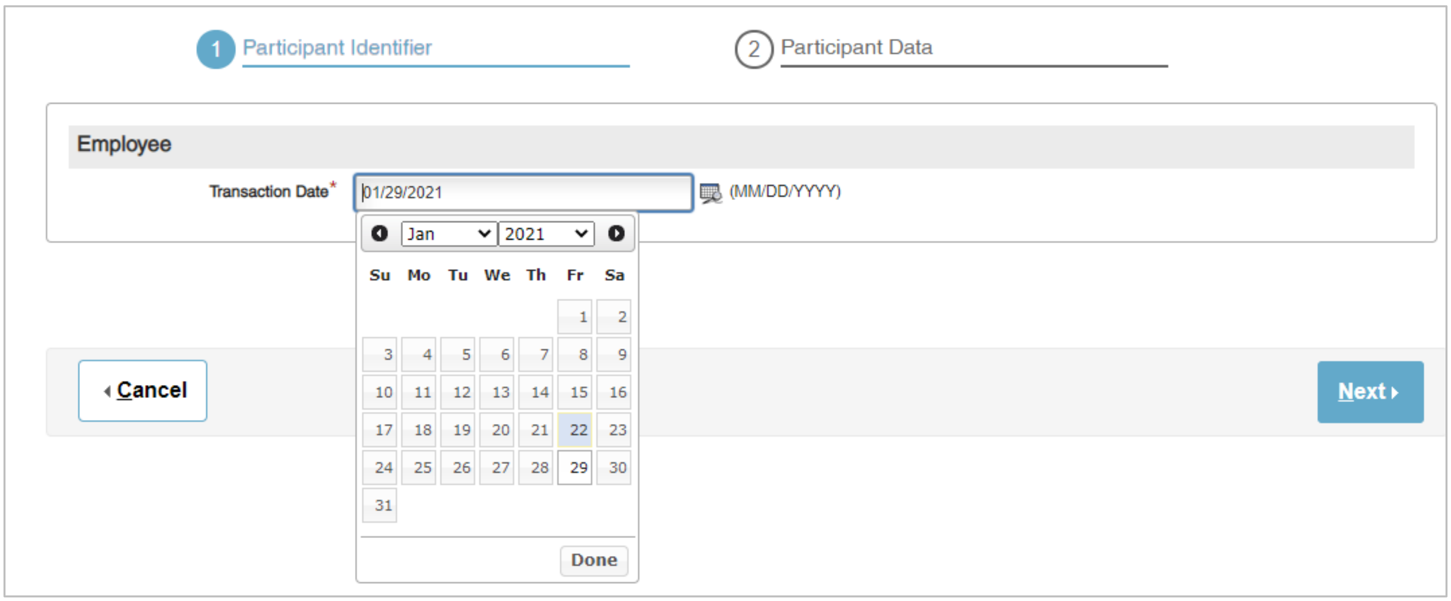


Last Name	First Name	DOB	SSN	Employee ID	Status	Eligibility	Actions
Adams	Bob	-	*****3456	001390	Deceased	Not eligible	
Bennett	Doug	-	*****8888	001365	Active	Active Full time, Part time or Ma...	
Franklin	James	-	*****9999	001355	Retired	Retired	
Smith	Jeannie	-	*****7890	001354	Active	Not eligible	

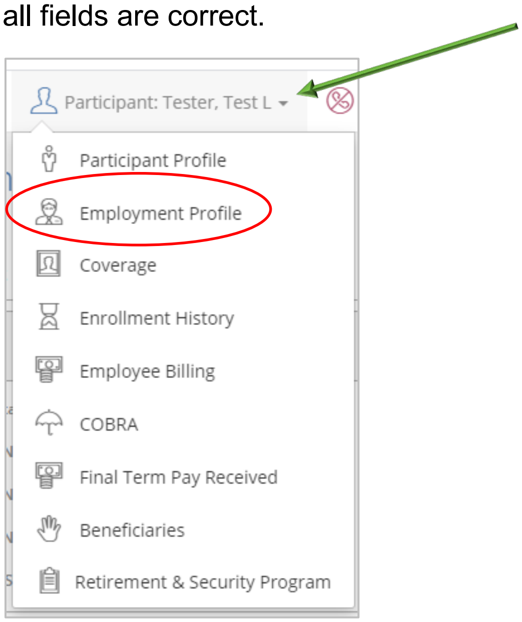
To begin the employment change process, click the "Edit Participant" button.



Enter the "Transaction Date" by selecting the date from the drop-down calendar. This is the date the employee changes from full-time or part-time status, date of death, or the last day of active employment for retirements and terminations.



Note: It is a good practice to review the participant's employment details to ensure the information regarding the employment change is accurate. Click the arrow next to the participant's name at the top of the screen and select "Employment Profile" to open the record and then review the section title "Employment Details". Confirm all fields are correct.



Changing to Full-Time Status

Update the following fields:

Group Code: Choose “Full-time Employee”.

Offers GHP Part-Time Policy: Clear the selection in this field.

Meet GHP Part-Time Policy: Clear the selection in this field.

Scheduled to Reach 1000 Hours: Clear the selection in this field.

Note: The “Date of Employment” does not change.

Click the “Next” button.

Changing to Part-Time Status

Update the following fields:

Group Code: Choose “Part-time Employee”.

Offers GHP Part-Time Policy: Select “Yes” or “No” depending upon whether your company offers the NTCA Group Health Program and has a part-time policy that applies to eligibility for that benefit plan.

Meet GHP Part-Time Policy: Select “Yes” only if the part-time employee meets your company’s established policy.

Scheduled to Reach 1000 Hours: Select “Yes” and also select “Yes” for “Offers GHP Part-Time Policy” if the new participant is scheduled to reach 1,000 hours. Participants who are scheduled to reach 1,000 hours are eligible for the R&S Program and/or Savings Plan and this ensures the record is processed correctly in the system.

Note: The “Date of Employment” does not change.

Click the “Next” button.

Terminating an Employee

The “Transaction Date” is the last day the employee worked.

Required Fields

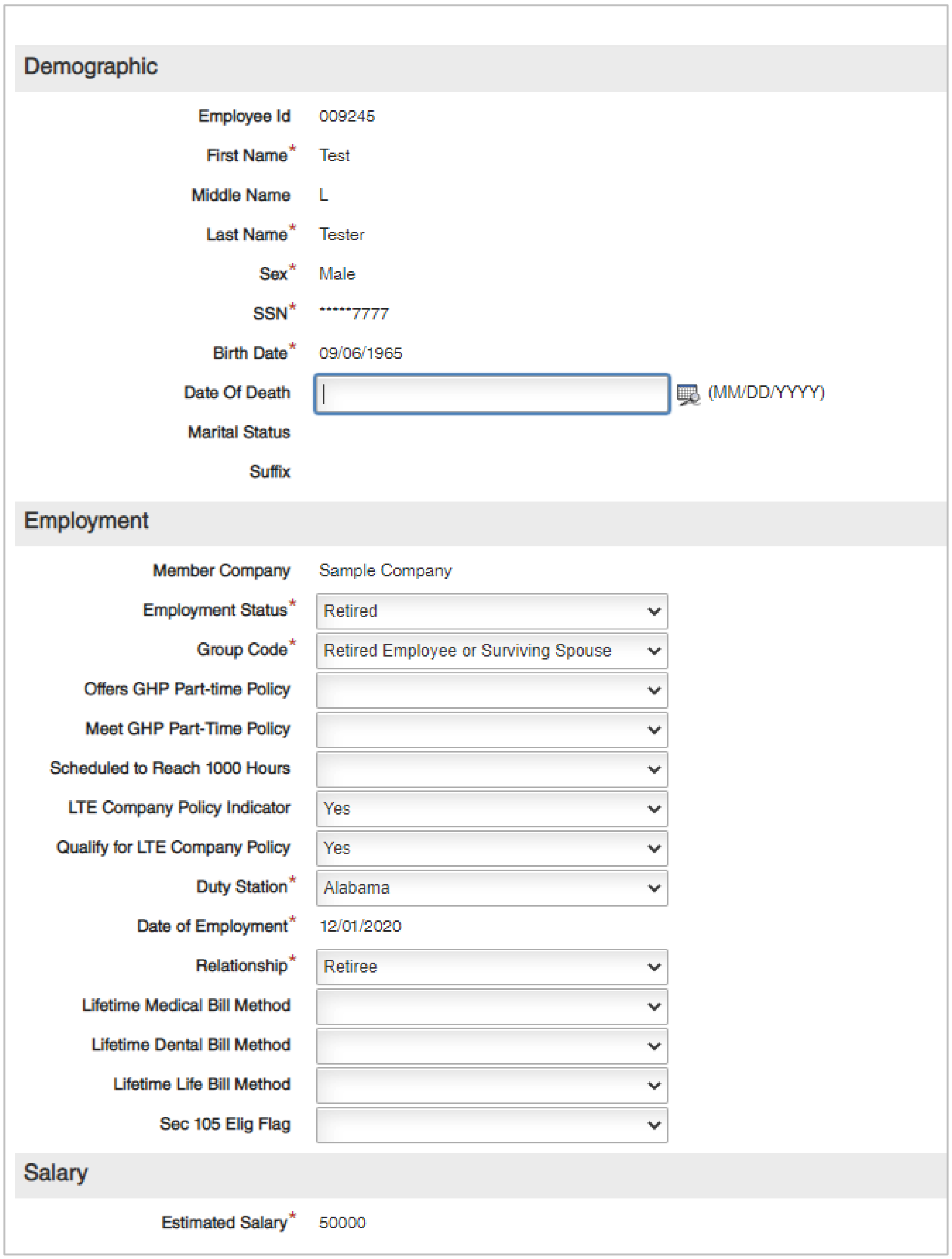
Employment Status: Select “Terminated”

Click “Next”. There are no further action steps needed.

Retirement of an Employee or Director

Once you have entered the “Transaction Date”, the employee’s last day of active employment, click “Next” and the “Participant Identifier” screen will open.

Note: Employees or directors age 55 or older should be reported as retired if the individual terminates employment or leaves the board. Questions regarding a written policy that defines retirement eligibility differently are shown on the screen and should be completed to ensure correct retiree benefits are offered. Please contact the NTCA Benefits Enrollment Unit at either BE-East@ntca.org or BE-West@ntca.org if you need assistance in determining the employment status.


Demographic

Employee Id	009245
First Name*	Test
Middle Name	L
Last Name*	Tester
Sex*	Male
SSN*	*****7777
Birth Date*	09/06/1965
Date Of Death	(MM/DD/YYYY)
Marital Status	
Suffix	

Employment

Member Company	Sample Company
Employment Status*	Retired
Group Code*	Retired Employee or Surviving Spouse
Offers GHP Part-time Policy	
Meet GHP Part-Time Policy	
Scheduled to Reach 1000 Hours	
LTE Company Policy Indicator	Yes
Qualify for LTE Company Policy	Yes
Duty Station*	Alabama
Date of Employment*	12/01/2020
Relationship*	Retiree
Lifetime Medical Bill Method	
Lifetime Dental Bill Method	
Lifetime Life Bill Method	
Sec 105 Elig Flag	

Salary

Estimated Salary*	50000

First confirm the address in the system is correct. If the address needs to be updated, enter a transaction date **prior** to the retiree’s last day worked (i.e., the day before) and update the address. It important to note that this event must be done separately from processing the employment change.

Required Fields

Employment Status: Select “Retired”.

Group Code: Choose one of the following two options:

- Retired Employee or Surviving Spouse
- Retired Director or Surviving Spouse of Director

LTE Company Policy Indicator:

- Select “Yes” if your company has a written policy, in place at the time of the participant’s retirement, for retiree Lifetime Extension (LTE) *eligibility*. Please note that the policy must specifically define *eligibility*.
- Select “No” if your company does not have a written policy for retiree Lifetime Extension (LTE) eligibility. If no is selected, NTCA’s definition of a retired employee, as outlined in the NTCA GHP Specifications, will apply.

Qualify for LTE Company Policy:

- Select “Yes” if your company has a defined retiree eligibility policy and the retiree meets your company’s established policy.
- Select “No” if your company has a defined retiree eligibility policy and the retiree does not meet your company’s established policy.

Relationship: Select “Retiree”.

The remaining three fields, “Lifetime Medical Bill Method”, “Lifetime Dental Bill Method”, and “Lifetime Life Bill Method”, have the same choices to select either “Member Company” or “Individual”. If your company wants to be billed for the retiree’s coverage, select “Member Company”. If you want NTCA to bill the retiree directly, select “Individual”. You can use these fields for situations where you want a benefit coverage billed to the company and another benefit coverage billed directly to the retiree.

Note: If you do not update the bill method for each field, your company’s default billing method will apply.

Click “Next”.

Note: Forms are sent within two business days after the event is generated in the system.

Death of an Employee or Director

Enter “Transaction Date” and “Date of Death” as the same date. Once these dates are entered, click “Next” and no further steps are needed.

Reporting Final Compensation

When employees participating in the R&S Program separate service, final compensation must be submitted.

<u>Eligible pension salary is defined below:</u>

'Separation of Employment' indicates the employment relationship has ended. The date on which the separation occurs will be used to determine the eligible W-2+ compensation. The 'Final Payroll' is the payroll period that contains the separation date. Generally, all eligible compensation earned during the year up to and including on the 'Final Payroll' is included in the W-2+ definition (with the exception of the value of employer provided group term life greater than $50,000).

Compensation paid after separation of employment is only considered W-2+ Compensation if, absent the separation of employment, the compensation would have been paid to the former employee and is paid within the later of 2½ months after the employee's separation of employment or the end of the plan year in which the separation of employment occurred.

Post-separation compensation considered for plan contributions does not include payments for severance, sick time, vacation, or other leave paid after the final payroll is not included in W-2+ unless such payments are included in the employee's paycheck for the payroll period that includes the date of separation.

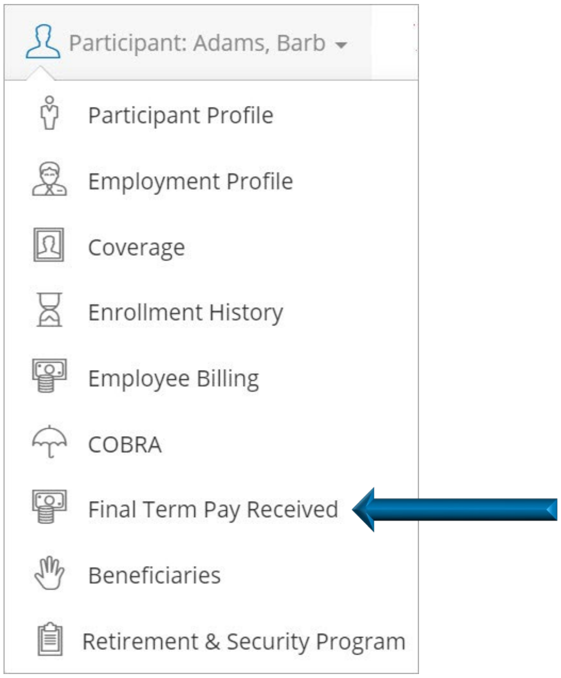
Compensation paid to a former employee who left employment for qualified military service or long-term disability payments paid to an employee or former employee are included in W-2+ compensation only if the employer has elected on its adoption agreement to allow such employees to continue participation.

Reporting final compensation is either a 2-step process or a 3-step process depending on when the employee began participation in R&S. Both the W2 Earnings and Pension Salary need to be entered. If your employee has been a continuing participant of R&S or began participating as of January 1st, reporting final compensation will be a 2-step process. If your employee began R&S participation mid-year, reporting final compensation will be a 3-step process. To verify when R&S coverage began, go to the "Coverage History" screen for the participant.

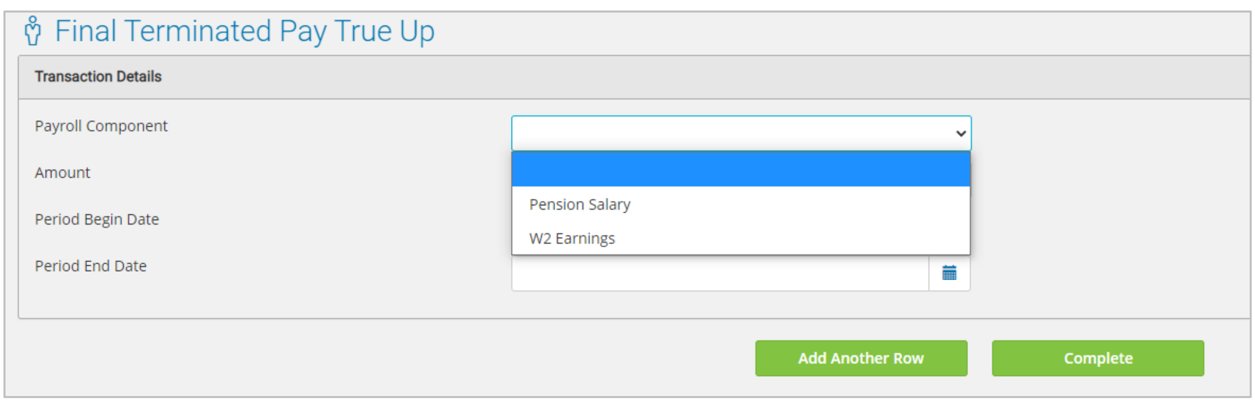
Note: All of the steps in either the 2-step process or the 3-step process must be completed for the information submitted to be accurate.

Reporting Final Term Pay Received for a Full-year R&S Participant (2-step process)

Select “Final Term Pay Received” from the participant drop down box.



When you open the screen to enter final pay, you will notice the “Payroll Component” box allows you to select either Pension Salary or W2 Earnings.



From the “Payroll Component” drop down box select “Pension Salary.”

Enter the compensation amount.

Enter the “Period Begin Date.” For employees that have been a participant for the entire year, this date will be January 1 of the current year.

Enter the “Period End Date.” This is the last day the employee was an active employee.

Click “Add Another Row.”

From the “Payroll Component” drop down box, select W2 earnings.

Enter the compensation amount.

Enter the “Period Begin Date.”

Enter the “Period End Date.”

Click “Complete.” Do not click “Add Another Row” a second time.

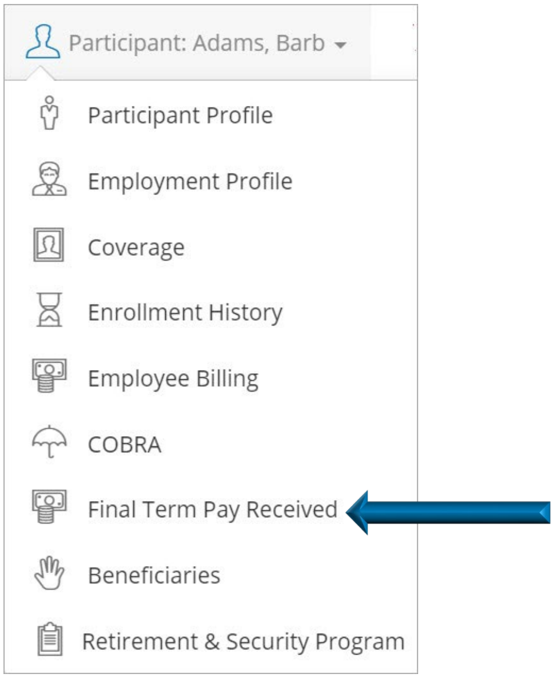
Once you have entered the amounts, you will see a blank screen.

To verify amounts that have been entered see the **Verify Your Final Comp Entries** section of this document.

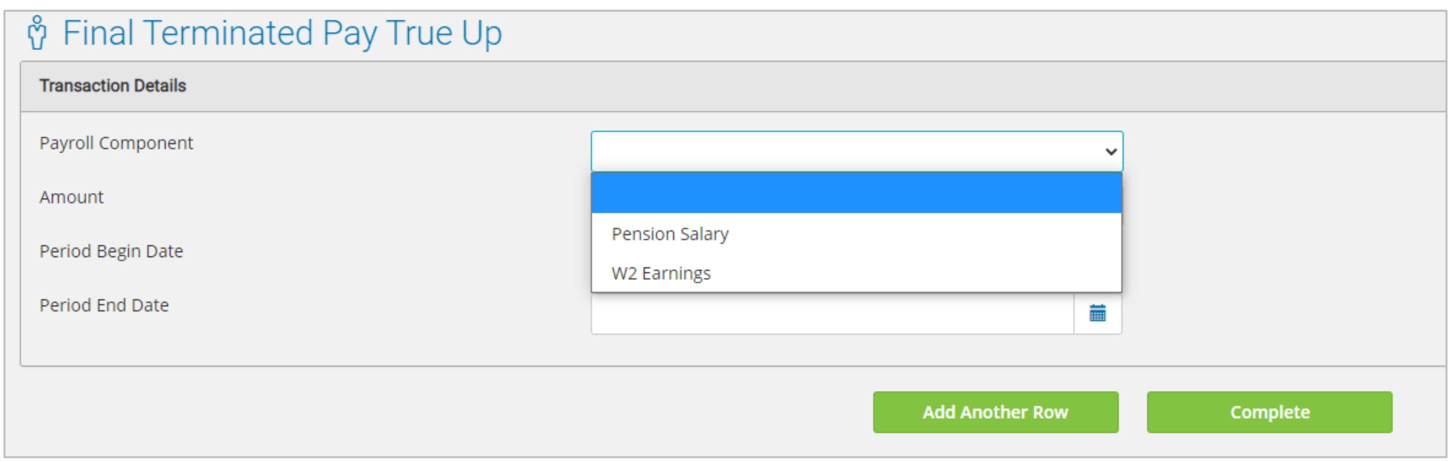
Reporting Final Term Pay Received for a Mid-year R&S participant (3-step process)

If your employee started R&S participation Mid-Year, you will be entering final compensation in 3 steps (see example below):

Select “Final Term Pay Received” from the participant drop down box.



When you open the screen to enter final pay, you will notice the “Payroll Component” box allows you to select either Pension Salary or W2 Earnings.



From the “Payroll Component” drop down box select “Pension Salary.”

Enter the compensation amount.

Enter the “Period Begin Date”. For employees where R&S participation started mid-year, this date will be their eligibility date. It will likely be April 1, July 1 or October 1.

Enter the “Period End Date.” This is the last day the employee was an active employee.

Click “Add Another Row.”

From the “Payroll Component” drop down box, select W2 earnings.

Enter the compensation amount the employee received prior to beginning participation in R&S.

Enter the “Period Begin Date.” The date W2 earnings began during the year for the employee.

Enter the “Period End Date.” This will be the last day of the month prior to when R&S participation began.

Click “Add Another Row” to add the W2 earnings while the employee was a participant in R&S.

Enter the “Period Begin Date.” The date the employee began participating in R&S.

Enter the “Period End Date.” This is the last day the employee was an active employee.

Click Complete.

Once you have entered the amounts, you will see a blank screen.

To verify amounts that have been entered see the **Verify Your Final Comp Entries** section of this document.

Example of the 3-step process to enter final comp for a mid-year participant:

Employee who began participating in R&S 4/1/2021 and termed employment on 4/30/2021:

In this case, you will enter final comp for W2 Earnings two times to split the non-participating and participating comp.

You will also enter final compensation for the pension salary for the compensation earned while participating in R&S.

Total 2021 W2 compensation is $42,000

Enter W2 final comp for dates: 1/1/2021 – 3/31/2021 as $30,000 W2 Earnings

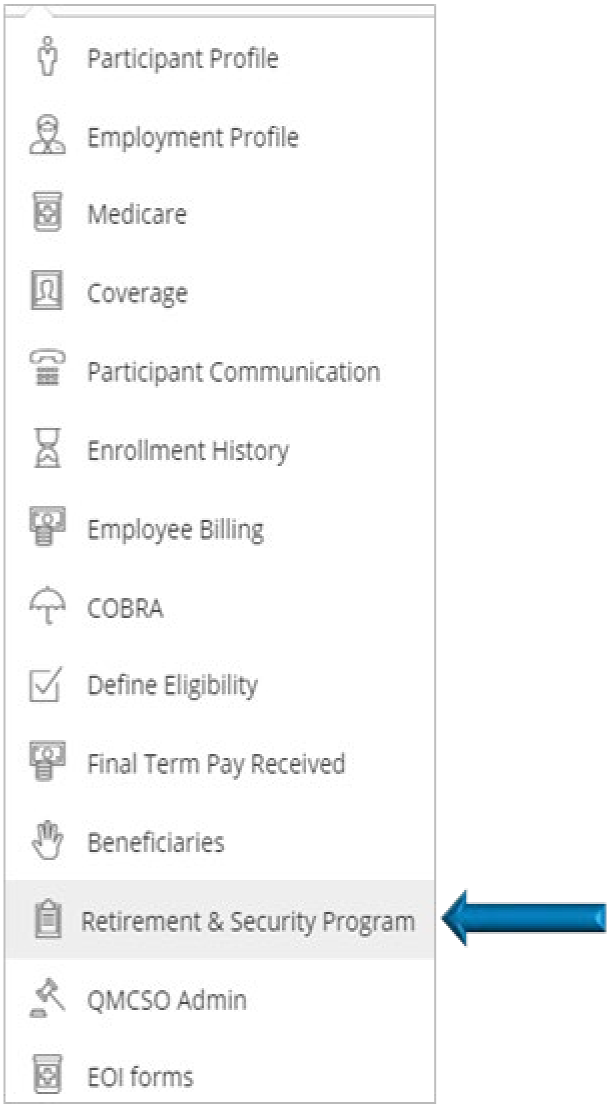
Enter W2 final comp for dates: 4/1/2021 – 4/30/2021 as $12,000 W2 Earnings

Enter Pension final comp for dates: 4/1/2021 – 4/30/2021 as $12,000 Pension Salary

If you enter the wrong amount, please contact NTCA to assist with correcting the comp.

Verify Your Final Comp Entries

You can verify the amounts you entered using "Retirement & Security Program" from the participant drop down box.



Click "View Pensionable Earnings".

Historical salary information will be displayed for all years the participant was in R&S.

Pensionable Pay Hours Summary

Entity Id: [redacted]

Earnings

Year	Begin Date	End Date	W2 Earnings	Pension Salary
2020	01/01/2020	12/31/2020	$33,537.93	$33,537.93
2019	01/01/2019	09/30/2019	$24,558.00	$24,558.00
2018	01/01/2018	12/31/2018	$30,939.06	$30,939.06
2017	01/01/2017	12/31/2017	$30,716.00	$30,716.00
2016	01/01/2016	12/31/2016	$28,740.00	$28,740.00
2015	04/01/2015	12/31/2015	$19,678.00	$19,678.00

1

6 results found 10

While viewing R&S historical salary information, if your participant began R&S mid-year, click on the year to display multiple lines.

Pensionable Pay Hours Detail

Earnings Detail

Year	Begin Date	End Date	W2 Earnings	Pension Salary
2021	04/01/2021	04/30/2021	$12,000.00	$12,000.00
2021	01/01/2021	03/31/2021	$30,000.00	$0.00

1

2 results found 10

Reporting

Detailed reports with information about your participants' benefit plans and coverages are available using *My NTCA Benefits*. From the home page, select the "Reporting" icon from the left side of the screen.

The reporting tools module will open in a separate browser tab. If there is a period of no activity in the reporting tools module, the site may time out your session and you will need to log back into *My NTCA Benefits*.

Quick Tip: Pop-up blockers should be disabled on your computer to access the reporting tools.

Available Reports

Report Name	Type	Description	Typically Used To
*Beneficiary Extract	Standard	Provides beneficiary demographic and enrollment information	Confirm beneficiaries are on file with NTCA benefits.
*Benefit Extract	Standard	Provides participant benefit elections as of the current date (excluding SSN)	Review participant benefit elections.
*Dependent Extract	Standard	Provides dependent demographic and enrollment information (excluding SSN)	Audit employee records and preparing for open enrollment.
Employee Extract	Standard	Provides participant demographic and employment information (excluding SSN)	Review information on file with NTCA benefits.
Enrollment Status	Standard	Provides the status of events.	Confirm completion of enrollment process for newly hired employee. See life events such as birth, marriage, divorce and address changes triggered by entry in the *My NTCA Benefits* participant portal.
*Benefit Change Report	Custom	Provides benefit plans and cost details for participants making benefit changes in a specified time period.	Identify participant record changes that could impact payroll deductions.
Benefit Election	Custom	Provides coverage election details for annual enrollment.	Determine annual enrollment elections that could impact payroll deductions.
Benefit Savings	Custom	Provides list of employees enrolled in the Savings Plan as of a specific selection criterium.	Verify participant enrollment dates in the Savings Plan.
Billing Summary by State	Custom	Provides invoice totals and participant count by group, entity, invoice date, and billing item for a chosen state.	Show state-specific information for review of billing rates.
Estimated Salary	Custom	Provides list of estimated salary information.	By members with salary-related benefit plans to report future estimated salaries for their participants (e.g., annual estimated salary collection project.)

** These reports are scheduled and available on-demand.*

On-Demand Reporting

The Standard Reports menu will provide options to extract data specific to participants and participants' dependents. This screen shows the list of available reports with a brief description of each report's primary purpose.

Standard Reports

Each of these reports provides the ability to pre-filter the data based on several criteria. Once a report is run, the data can be further excluded, grouped, sorted and have formulas applied as required. Once manipulated, the data can then be downloaded in a comma-delimited format that can be opened in Excel or as a read-only PDF file.

Report	Description
Beneficiary Extract	Provides beneficiary demographic and enrollment information
Benefit Extract	Provides participant benefit elections as of the current date (excluding SSN)
Dependent Extract	Provides dependent demographic and enrollment information (excluding SSN)
Employee Extract	Provides participant demographic and employment information (excluding SSN)
Enrollment Status	Provides the status of events.

Quick Tips:

- The extract reports may be useful for auditing employee records and/or preparing for open enrollment comparisons.
- The Enrollment Status report provides a quick way to see if the enrollment process has been completed for a newly hired employee.

Enrollment Status Report

To select a report from the Standard Report menu, highlight and click on the report name.

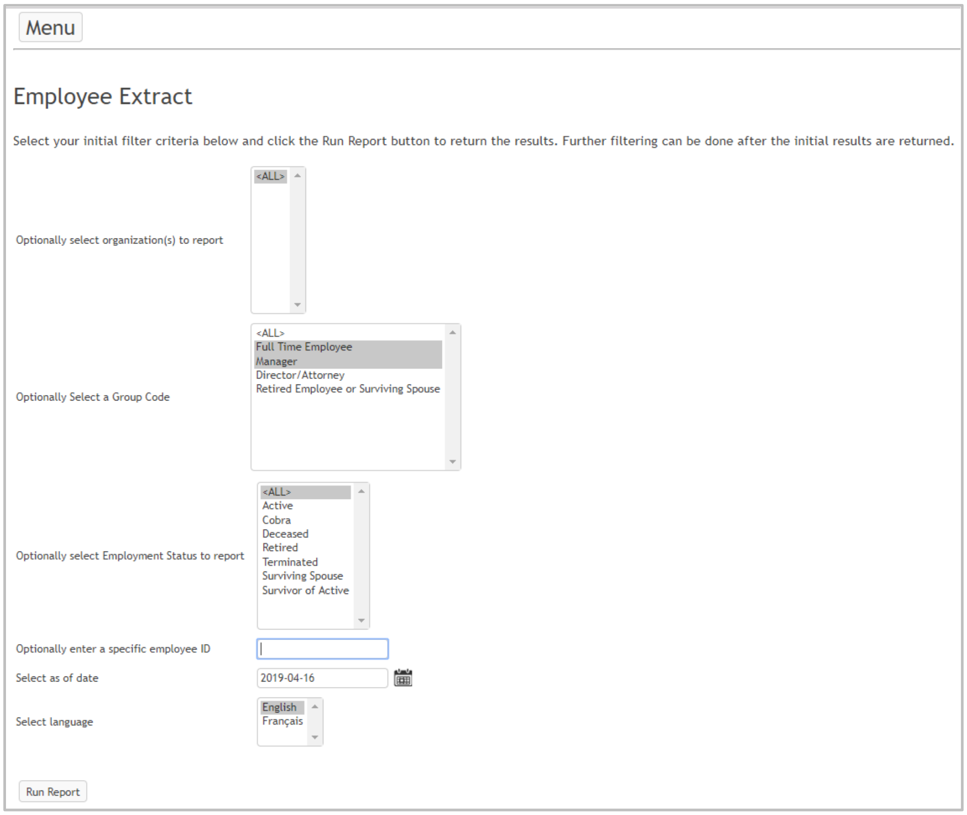
Standard Reports

Each of these reports provides the ability to pre-filter the data based on several criteria. Once a report is run, the data can be further excluded, grouped, sorted and have formulas applied as required. Once manipulated, the data can then be downloaded in a comma-delimited format that can be opened in Excel or as a read-only PDF file.

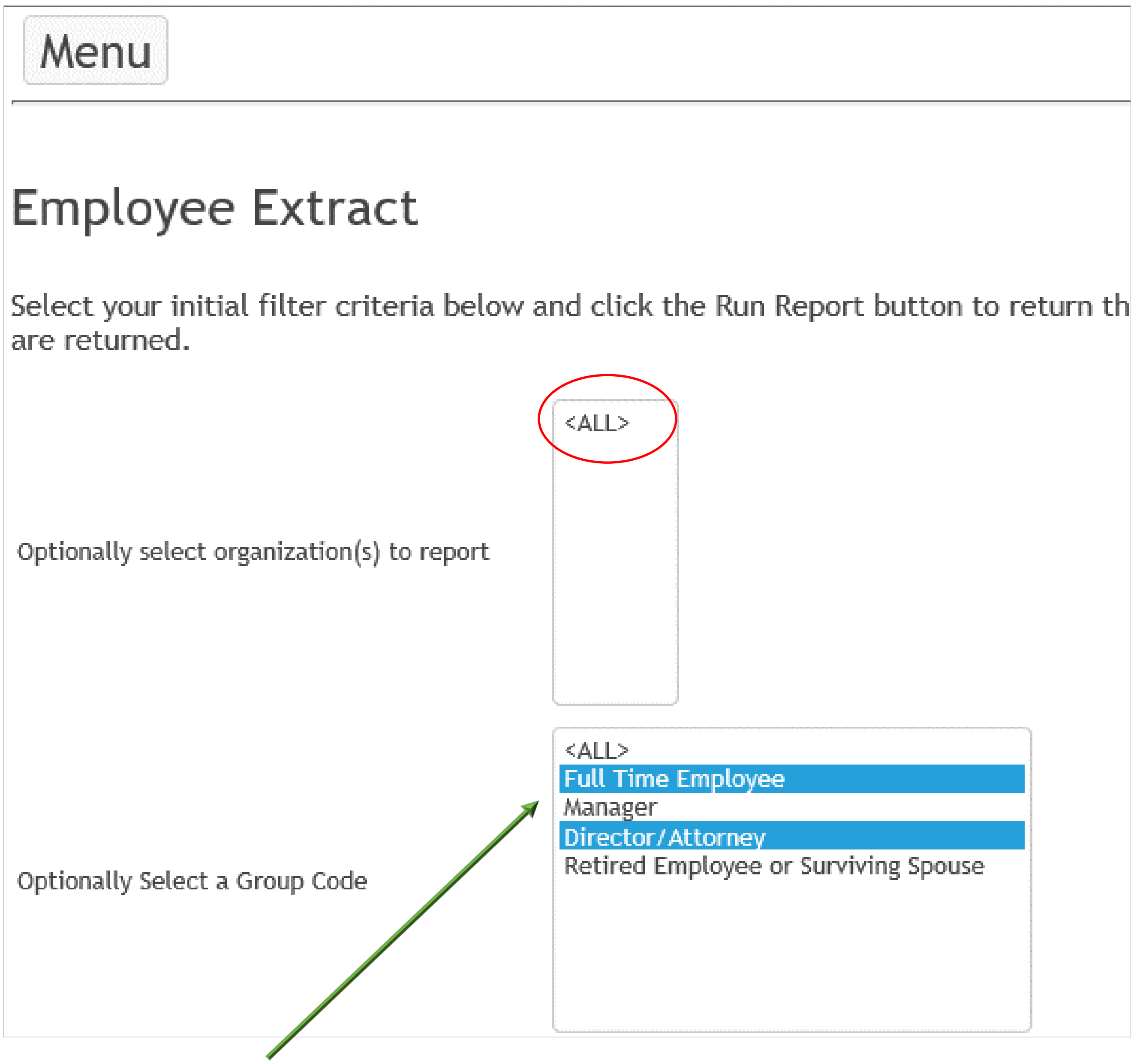
Report	Description
Beneficiary Extract	Provides beneficiary demographic and enrollment information
Benefit Extract	Provides participant benefit elections as of the current date (excluding SSN)
Dependent Extract	Provides dependent demographic and enrollment information (excluding SSN)
Employee Extract	Provides participant demographic and employment information (excluding SSN)
Enrollment Status	...he status of events.

Report Criteria Options

A menu will appear with initial criteria options.

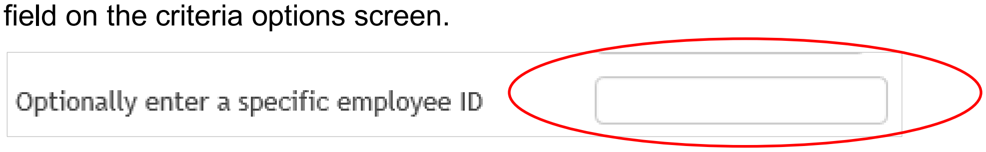


Select a filter criterion for each reporting option even if the selection is “ALL”. For example, for the Employee Extract report, you can choose to select a specific company or ALL companies. The same can be done in each of the “Optionally select…” criteria fields.



Quick Tip: To choose multiple selection criteria, hold the Ctrl key and press enter to make selections.

You can run a report and extract data for a specific participant. Just enter the Employee ID number in the input field on the criteria options screen.



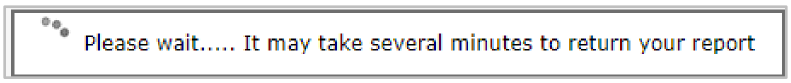
Quick Tip: The employee ID is the NTCA-assigned number. This number is included on your benefit plan bills.

The “Select as of date” option defaults to the current calendar date and produces results for current record data. You can change the “select of date”, but it’s important to remember that the date entered will result in records retrieved onto the report that have data elements with starting effective dates less than or equal to the date selected and ending effective dates that are either blank or greater than the selected as of date.

Generating Reports

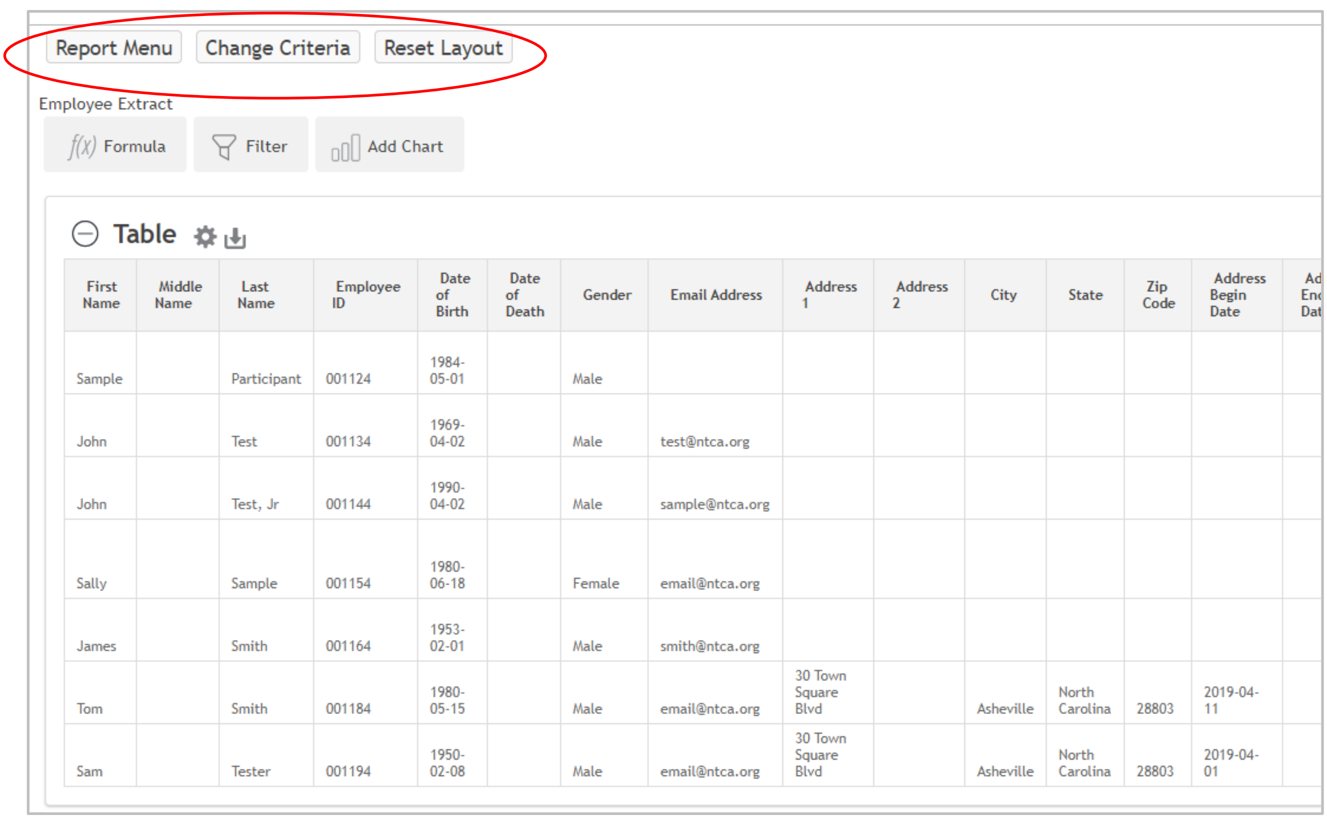
Click on the “Run Report” button when you have finished selecting the various report criteria.

You will see a message on the screen indicating the report is being generated.



The report results will be displayed on the screen. You have several options:

- Return to the main reporting menu to select a different report. Select “Report Menu.”
- Return to the prior screen to change the filter criteria selected for your current report. Select “Change Criteria.”
- Reset the layout of the current table that is displayed if filters have been selected. Select “Reset Layout.”

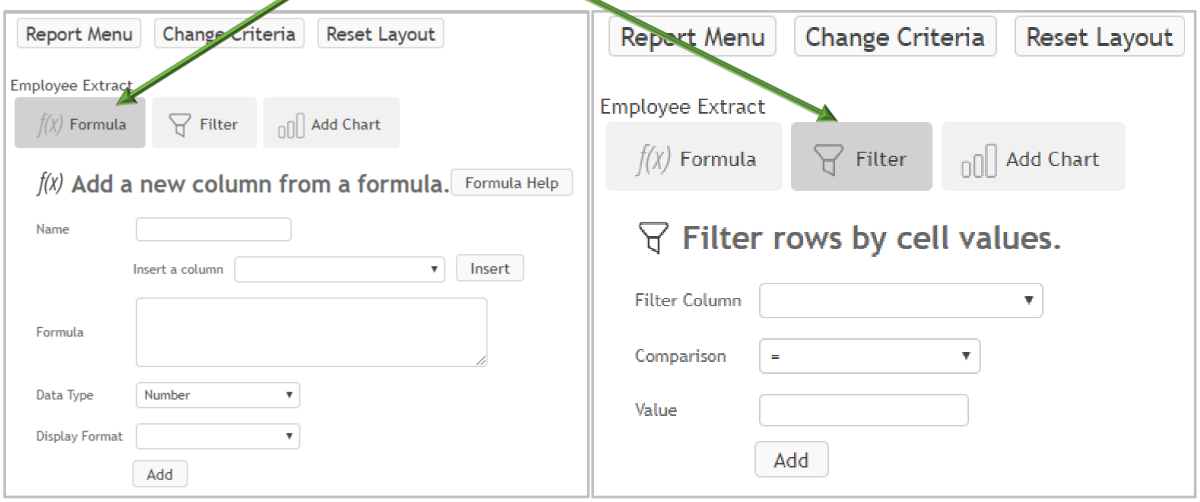


First Name	Middle Name	Last Name	Employee ID	Date of Birth	Date of Death	Gender	Email Address	Address 1	Address 2	City	State	Zip Code	Address Begin Date	Ad End Dat
Sample		Participant	001124	1984-05-01		Male								
John		Test	001134	1969-04-02		Male	test@ntca.org							
John		Test, Jr	001144	1990-04-02		Male	sample@ntca.org							
Sally		Sample	001154	1980-06-18		Female	email@ntca.org							
James		Smith	001164	1953-02-01		Male	smith@ntca.org							
Tom		Smith	001184	1980-05-15		Male	email@ntca.org	30 Town Square Blvd		Asheville	North Carolina	28803	2019-04-11	
Sam		Tester	001194	1950-02-08		Male	email@ntca.org	30 Town Square Blvd		Asheville	North Carolina	28803	2019-04-01	

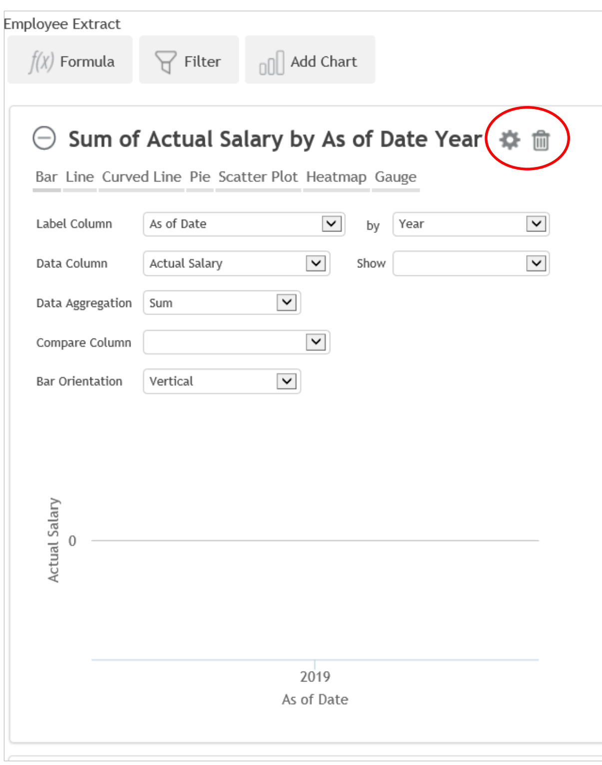
Refining Report Results

Using the “Formula”, “Filter” and “Add Chart” options buttons will allow you to refine the data results and provide additional tools for your data analysis.

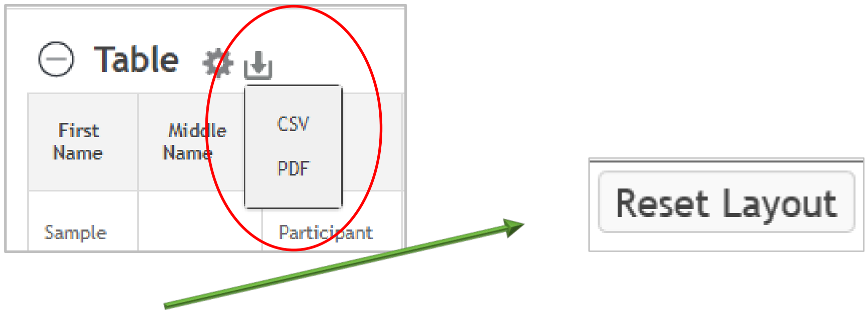
If you have selected the “Formula” or “Filter” options, simply click on the button again and the expanded panel will condense.



When you select the “Add Chart” option, use the gear icon to condense or expand chart options. Click the trash icon to remove the chart from the screen.



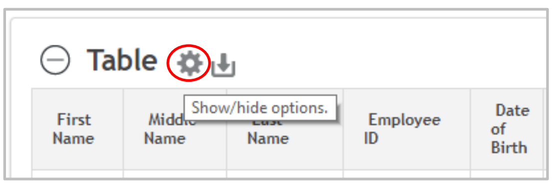
You can also download the data into Excel and apply filters using Excel tools. Click the arrow icon and select CSV (Excel).   A PDF format option is also available.



Quick Tip: Use the Reset Layout button found at the top of this screen to remove Formulas, Filters or Charts from the specific report.

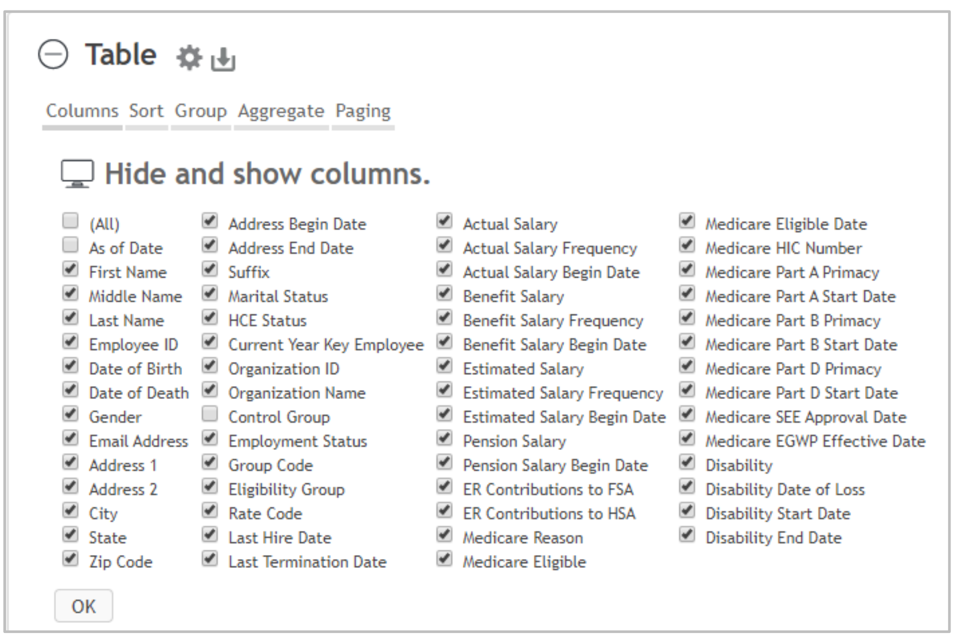
Additional Reporting Filter Options

Other filter options are available when you select the gear icon shown above the results table.



A list of data fields available on the selected report will be displayed, and it's easy to select the specific information you want to include on the report.

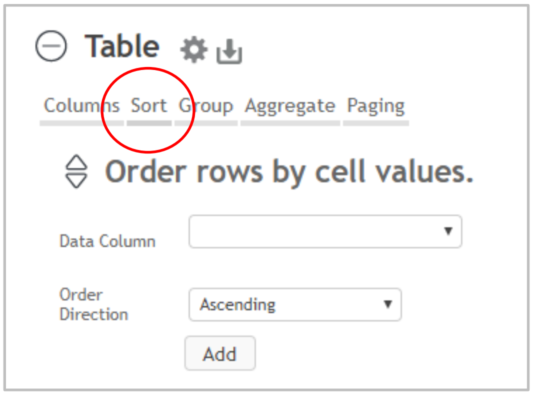
Quick Tip: Select "(All)" and click twice to deselect all columns. Then check the boxes beside the specific data element for your report and click "Ok".

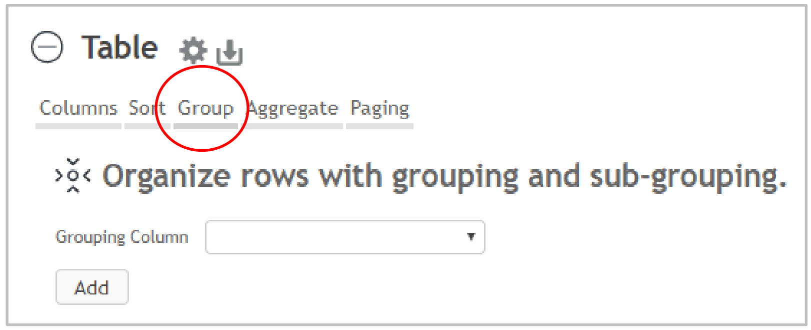


Report Layout Options

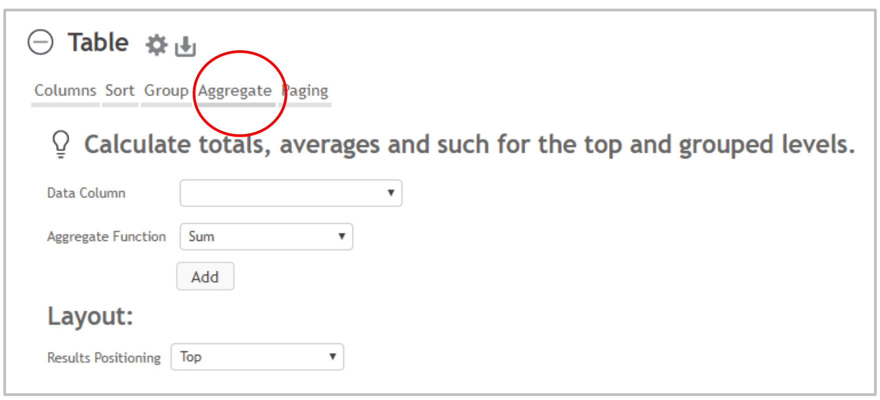
Additional tools are available to further refine the presentation of your report results.

You can sort results by specific columns by selecting the “Sort” option or group specific selections of data rows together using the “Group” option.

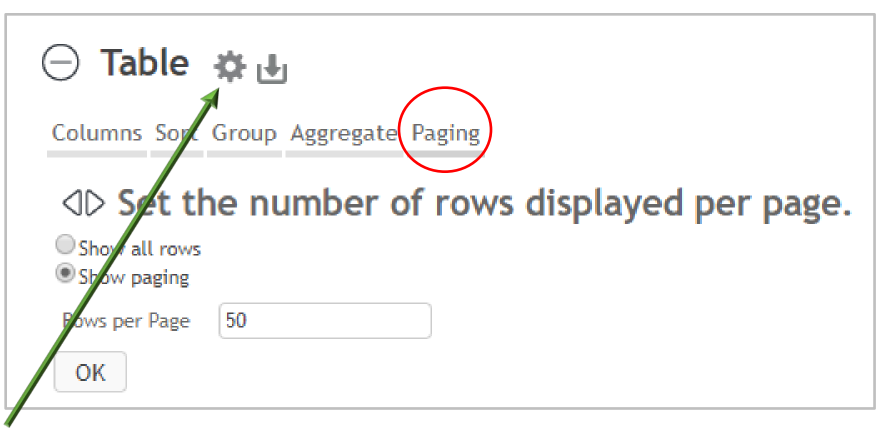




The “Aggregate” option provides options to calculate totals, averages and other functions, and then define how those results appear on the report layout.



Use the “Paging” option to change the maximum rows displayed on a page.



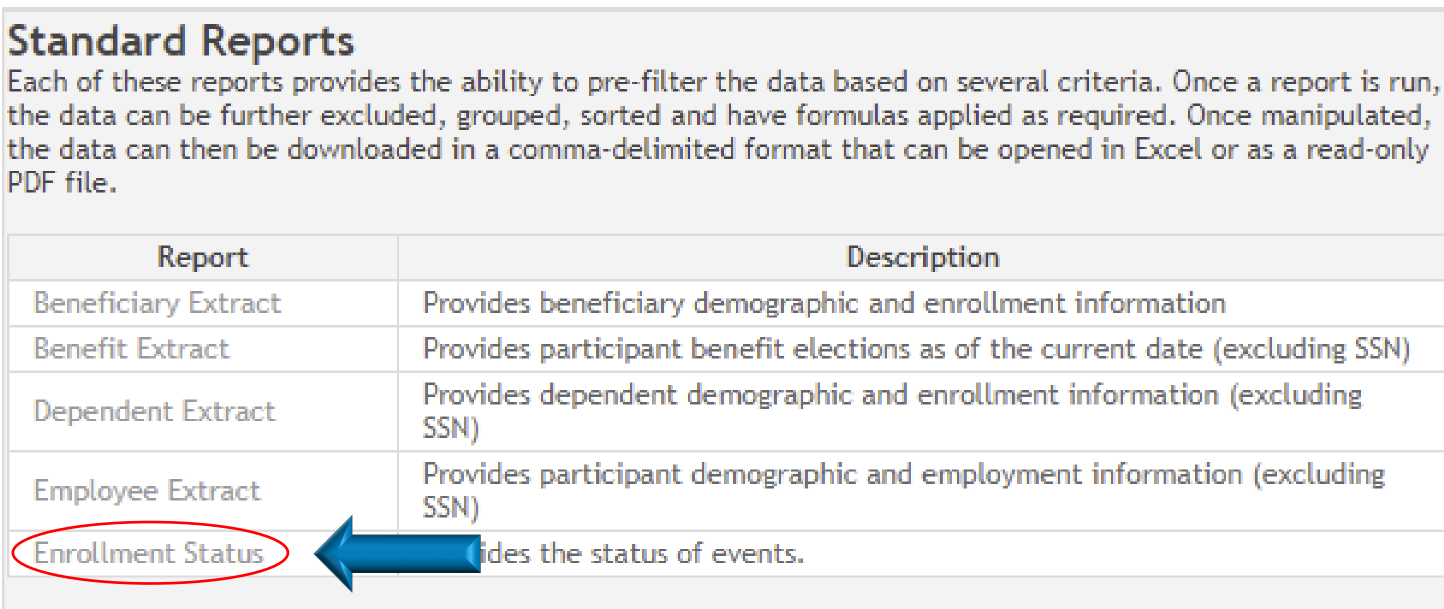
Click on the gear icon to close the selected options.

Return to the main report menu by selecting Report Menu or close the reporting browser once you are done using the Reporting Tool.

Annual Enrollment Reporting

You can use specific reports to monitor the status your participants' annual enrollment elections, and to identify the plans and coverage levels elected by each participant for the next year.

To determine which participants have entered and saved their enrollment elections using the *My NTCA Benefits* participant portal, select "Enrollment Status" from the Standard Reports menu by highlighting and clicking the report name.



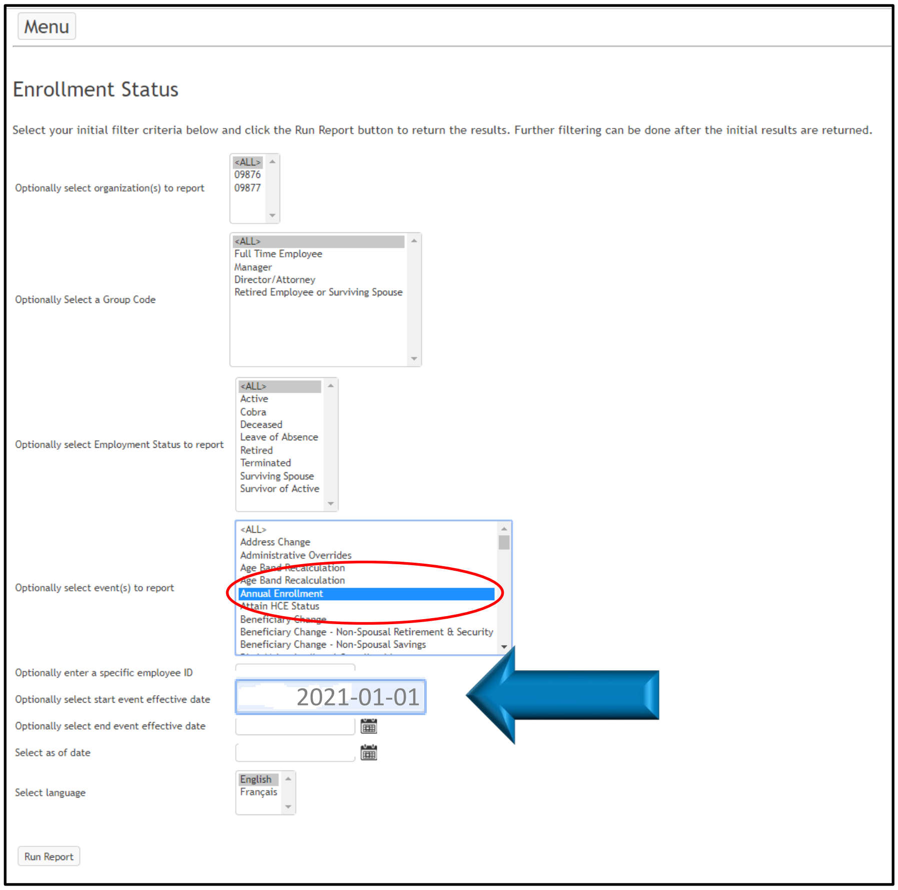
Standard Reports

Each of these reports provides the ability to pre-filter the data based on several criteria. Once a report is run, the data can be further excluded, grouped, sorted and have formulas applied as required. Once manipulated, the data can then be downloaded in a comma-delimited format that can be opened in Excel or as a read-only PDF file.

Report	Description
Beneficiary Extract	Provides beneficiary demographic and enrollment information
Benefit Extract	Provides participant benefit elections as of the current date (excluding SSN)
Dependent Extract	Provides dependent demographic and enrollment information (excluding SSN)
Employee Extract	Provides participant demographic and employment information (excluding SSN)
Enrollment Status	ides the status of events.

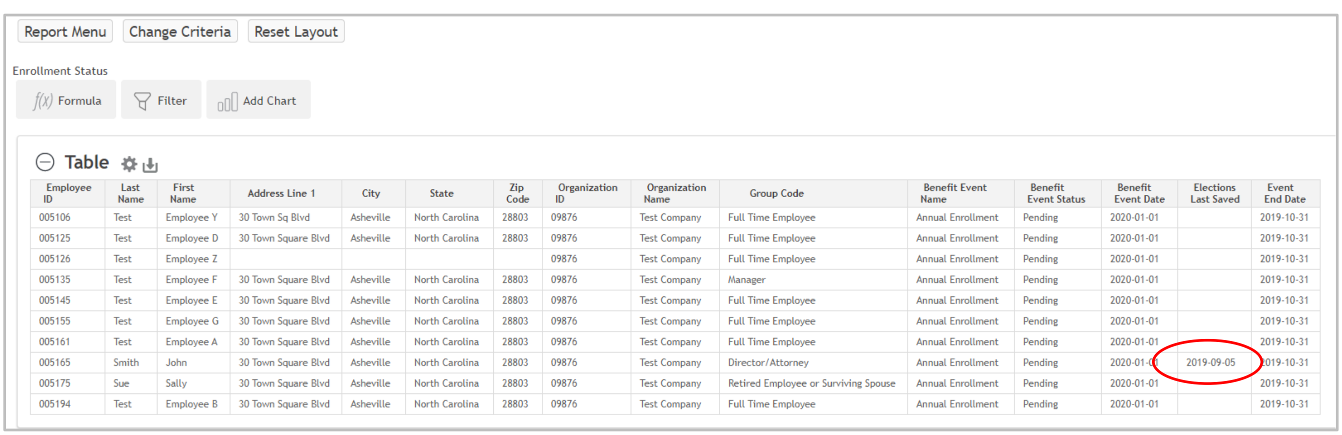
Report Criteria Options

When the menu appears with initial criteria options, select the specific reporting criterion and include the Annual Enrollment event report in your selections.



Select the first date of the next year as the “start event effective date’ date to see the status of each participant’s entry of their annual enrollment election. For example, input ‘2021-01-01’ to see the status of participant’s 2021 enrollment elections. The ‘end event effective date’ and the ‘select as of date’ should be blank.

Click ‘Run Report’ and the results will appear on screen. If there is a date appearing in the ‘Elections Last Saved’ column, it means the participant has completed their annual enrollment election.



Employee ID	Last Name	First Name	Address Line 1	City	State	Zip Code	Organization ID	Organization Name	Group Code	Benefit Event Name	Benefit Event Status	Benefit Event Date	Elections Last Saved	Event End Date
005106	Test	Employee Y	30 Town Sq Blvd	Asheville	North Carolina	28803	09876	Test Company	Full Time Employee	Annual Enrollment	Pending	2020-01-01		2019-10-31
005125	Test	Employee D	30 Town Square Blvd	Asheville	North Carolina	28803	09876	Test Company	Full Time Employee	Annual Enrollment	Pending	2020-01-01		2019-10-31
005126	Test	Employee Z					09876	Test Company	Full Time Employee	Annual Enrollment	Pending	2020-01-01		2019-10-31
005135	Test	Employee F	30 Town Square Blvd	Asheville	North Carolina	28803	09876	Test Company	Manager	Annual Enrollment	Pending	2020-01-01		2019-10-31
005145	Test	Employee E	30 Town Square Blvd	Asheville	North Carolina	28803	09876	Test Company	Full Time Employee	Annual Enrollment	Pending	2020-01-01		2019-10-31
005155	Test	Employee G	30 Town Square Blvd	Asheville	North Carolina	28803	09876	Test Company	Full Time Employee	Annual Enrollment	Pending	2020-01-01		2019-10-31
005161	Test	Employee A	30 Town Square Blvd	Asheville	North Carolina	28803	09876	Test Company	Full Time Employee	Annual Enrollment	Pending	2020-01-01		2019-10-31
005165	Smith	John	30 Town Square Blvd	Asheville	North Carolina	28803	09876	Test Company	Director/Attorney	Annual Enrollment	Pending	2020-01-01	2019-09-05	2019-10-31
005175	Sue	Sally	30 Town Square Blvd	Asheville	North Carolina	28803	09876	Test Company	Retired Employee or Surviving Spouse	Annual Enrollment	Pending	2020-01-01		2019-10-31
005194	Test	Employee B	30 Town Square Blvd	Asheville	North Carolina	28803	09876	Test Company	Full Time Employee	Annual Enrollment	Pending	2020-01-01		2019-10-31

Benefit Extract Report

When the Annual Enrollment event has been closed for your company, use the "Benefit Extract" report from the Standard Reports menu to identify final plan and coverage elections by your participants.

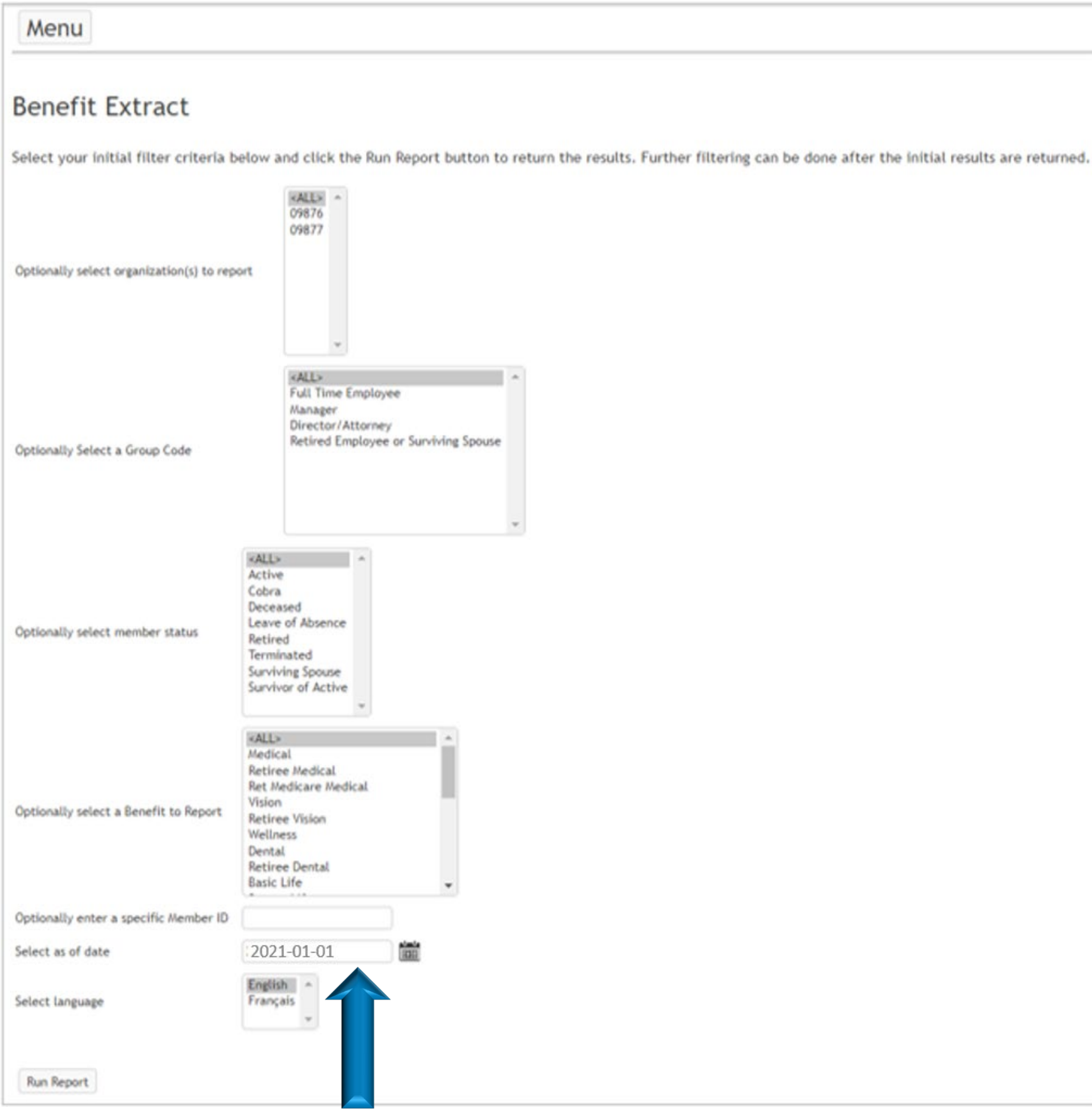
Standard Reports

Each of these reports provides the ability to pre-filter the data based on several criteria. Once a report is run, the data can be further excluded, grouped, sorted and have formulas applied as required. Once manipulated, the data can then be downloaded in a comma-delimited format that can be opened in Excel or as a read-only PDF file.

Report	Description
Beneficiary Extract	Provides beneficiary demographic and enrollment information
Benefit Extract	participant benefit elections as of the current date (excluding SSN)
Dependent Extract	Provides dependent demographic and enrollment information (excluding SSN)
Employee Extract	Provides participant demographic and employment information (excluding SSN)
Enrollment Status	Provides the status of events.

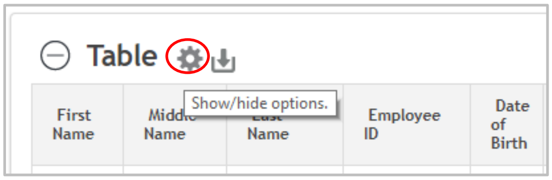
Report Criteria Options

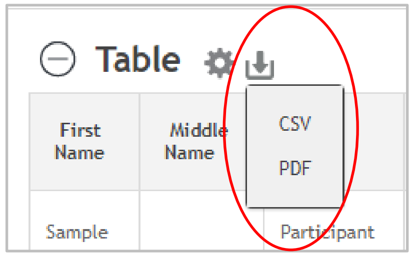
When the menu appears with initial criteria options, select the specific reporting criterion.

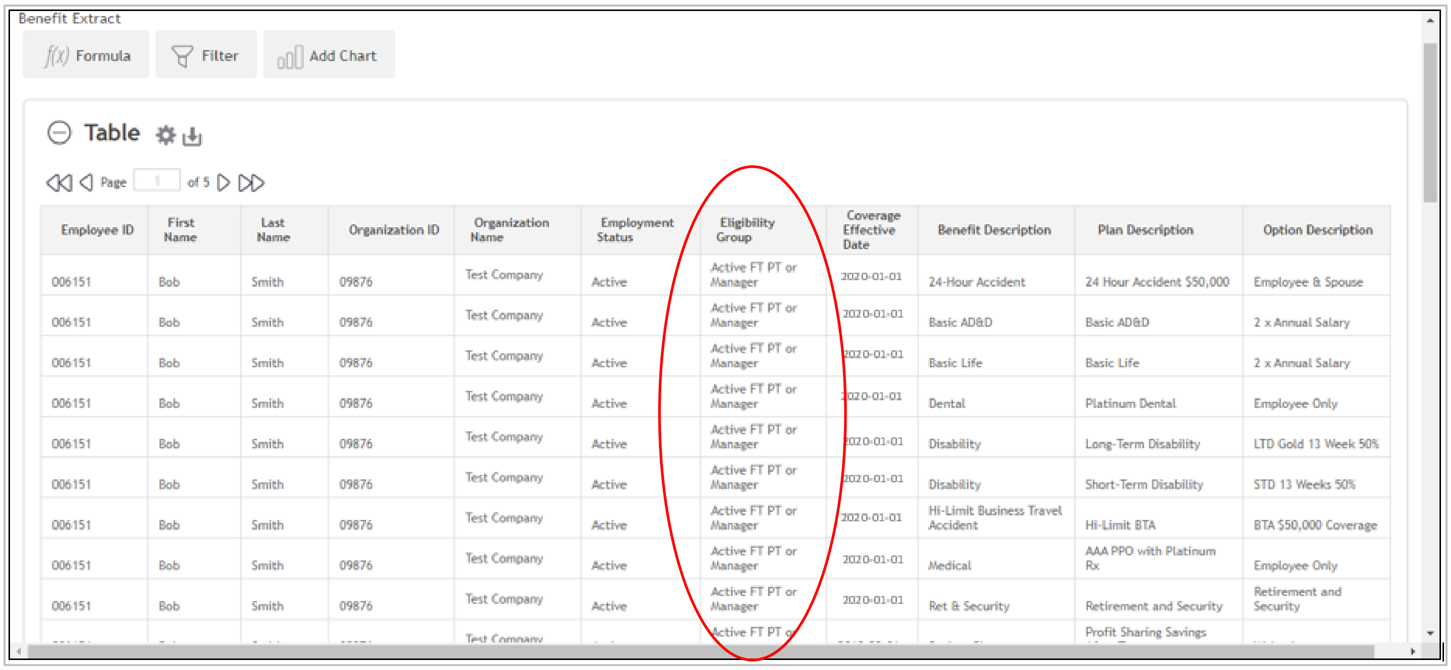


IMPORTANT: Set your “as of date” to the first day of the next year using the format YYYY-01-01. Then, run the report to see the final elections made by your participants.

Quick Tip: Refer to the [“Additional Reporting Filter Options”] section for more information on how to remove or sort columns and download your data.



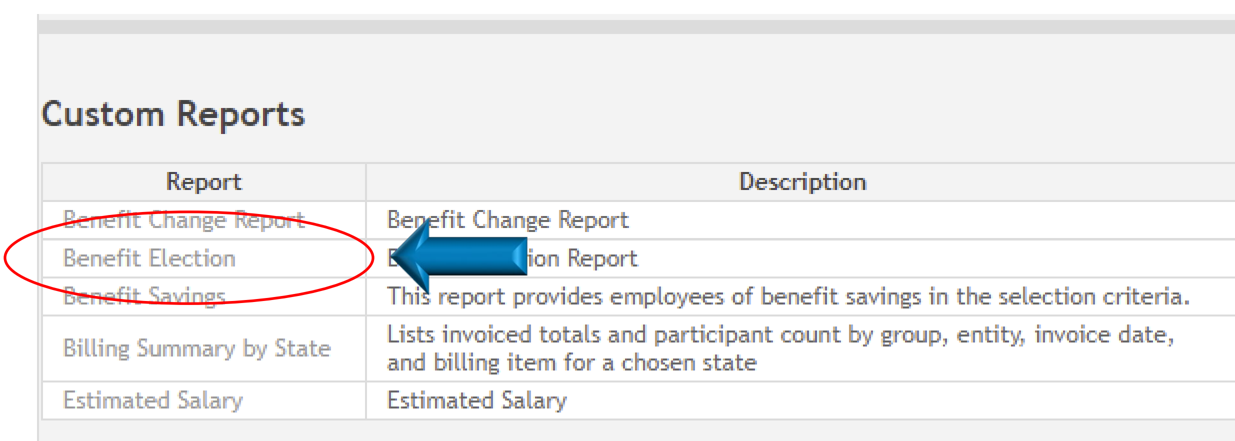




Employee ID	First Name	Last Name	Organization ID	Organization Name	Employment Status	Eligibility Group	Coverage Effective Date	Benefit Description	Plan Description	Option Description
006151	Bob	Smith	09876	Test Company	Active	Active FT PT or Manager	2020-01-01	24-Hour Accident	24 Hour Accident $50,000	Employee & Spouse
006151	Bob	Smith	09876	Test Company	Active	Active FT PT or Manager	2020-01-01	Basic AD&D	Basic AD&D	2 x Annual Salary
006151	Bob	Smith	09876	Test Company	Active	Active FT PT or Manager	2020-01-01	Basic Life	Basic Life	2 x Annual Salary
006151	Bob	Smith	09876	Test Company	Active	Active FT PT or Manager	2020-01-01	Dental	Platinum Dental	Employee Only
006151	Bob	Smith	09876	Test Company	Active	Active FT PT or Manager	2020-01-01	Disability	Long-Term Disability	LTD Gold 13 Week 50%
006151	Bob	Smith	09876	Test Company	Active	Active FT PT or Manager	2020-01-01	Disability	Short-Term Disability	STD 13 Weeks 50%
006151	Bob	Smith	09876	Test Company	Active	Active FT PT or Manager	2020-01-01	Hi-Limit Business Travel Accident	Hi-Limit BTA	BTA $50,000 Coverage
006151	Bob	Smith	09876	Test Company	Active	Active FT PT or Manager	2020-01-01	Medical	AAA PPO with Platinum Rx	Employee Only
006151	Bob	Smith	09876	Test Company	Active	Active FT PT or Manager	2020-01-01	Ret & Security	Retirement and Security	Retirement and Security
				Test Company		Active FT PT o			Profit Sharing Savings	

Benefit Election Report

The “Benefit Election” report in Custom Reports provides a side-by-side view of the benefit plan elections for your participants for the current year and next year. This report may be particularly helpful in identifying changes for payroll adjustments.

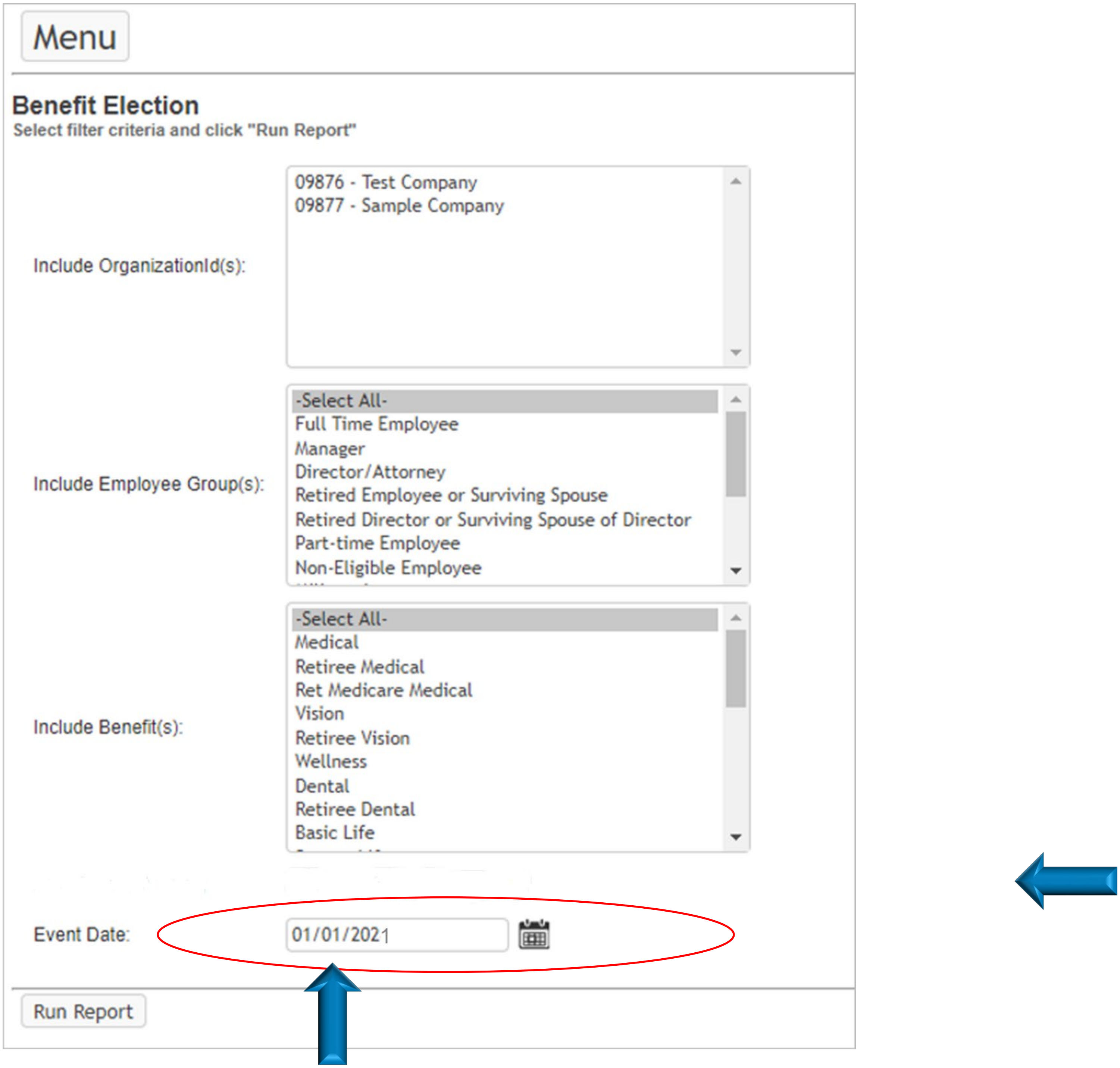


Custom Reports

Report	Description
Benefit Change Report	Benefit Change Report
Benefit Election	E ion Report
Benefit Savings	This report provides employees of benefit savings in the selection criteria.
Billing Summary by State	Lists invoiced totals and participant count by group, entity, invoice date, and billing item for a chosen state
Estimated Salary	Estimated Salary

When the menu appears with initial criteria options, select the specific reporting criterion. When you get to the “Select Benefit Event” section, the event should automatically show the annual enrollment event.

Report Criteria Options



IMPORTANT: Set your "Event Date" to the first day of the next year. It should be after the annual enrollment event closing date. The default will be 01/01/2021 if you are running the report for the 2021 annual enrollment event. Then, run the report to see a side-by-side view of the benefit plan elections for your participants.

Quick Tip: Refer to the "Additional Reporting Filter Options" section for more information on how to remove or sort columns and download your data.

Compare the information in the current year and future year columns to see all changes to plans and coverages made by your participants for their annual enrollment elections. You will likely want to download this data to an Excel file so you can more easily sort the data for your analysis and to identify changes that may impact payroll deductions.

Employee ID	Organization ID	First Name	Last Name	Current Benefit Description	Current Plan Description	Current Option Description	Current Amount Elected	Current Amount Inforce	Future Benefit Description	Future Plan Description	Future Option Description	Future Amount Elected	Future Amount Inforce	Defaulted Coverage
4872	9876	Bill	Sample	Savings Plan	Profit Sharing Savings Before Tax	Profit Sharing Savings Before Tax	5.00%	5.00%	Savings Plan	Profit Sharing Savings Before Tax	Profit Sharing Savings Before Tax	5.00%	5.00%	Yes
5106	9876	Joe	Test	Dental	Platinum Dental	Employee	$0.00	$0.00	Dental	Platinum Dental	Employee & Family	$0.00	$0.00	No
5106	9876	Joe	Test	Disability	Long-Term Disability	LTD Plat 26 Week 70%	$2,853.00	$2,853.00	Disability	Long-Term Disability	LTD Plat 26 Week 70%	$2,939.00	$2,939.00	No
5106	9876	Joe	Test	Medical	AAA PPO with Platinum Rx	Employee & Family	$0.00	$0.00	Medical	Bronze PPO with Platinum Rx	Employee & Family	$0.00	$0.00	No
5106	9876	Joe	Test	Ret & Security	Retirement and Security	Retirement and Security	$0.00	$0.00	Ret & Security	Retirement and Security	Retirement and Security	$0.00	$0.00	No
5106	9876	Joe	Test	Savings Plan	Profit Sharing Savings Before Tax	Profit Sharing Savings Before Tax	999.00%	999.00%	Savings Plan	Profit Sharing Savings Before Tax	Profit Sharing Savings Before Tax	2.00%	2.00%	No
5155	9876	Jane	Doe	Medical	Waived	Waived	$0.00	$0.00	Medical	Waived	Waived	$0.00	$0.00	Yes
5194	9876	Chris	Test	Hi-Limit Business Travel Accident	Hi-Limit BTA	BTA $50,000 Coverage	$50,000.00	$50,000.00	Hi-Limit Business Travel Accident	Hi-Limit BTA	BTA $50,000 Coverage	$50,000.00	$50,000.00	No
6151	9876	Bob	Smith	Medical	Silver PPO with Platinum Rx	Employee & Family	$0.00	$0.00	Medical	Silver PPO with Platinum Rx	Employee & Family	$0.00	$0.00	No
6151	9876	Bob	Smith	Ret & Security	Retirement and Security	Retirement and Security	$0.00	$0.00	Ret & Security	Retirement and Security	Retirement and Security	$0.00	$0.00	No
6151	9876	Bob	Smith	Savings Plan	Profit Sharing Savings Before Tax	Profit Sharing Savings Before Tax	999.00%	999.00%	Savings Plan	Profit Sharing Savings Before Tax	Profit Sharing Savings Before Tax	2.00%	2.00%	No
6161	9876	Karen	Example	Medical	Waived	Waived	$0.00	$0.00	Medical	A 1000/2000 with Platinum Rx	Employee & Spouse	$0.00	$0.00	No

Benefit Change Report

You can use the Benefit Change Report to identify your participants' benefit plan elections and other changes and to determine payroll adjustments.

Select "Benefit Change Report" from the Custom Reports menu by highlighting and clicking the report name.

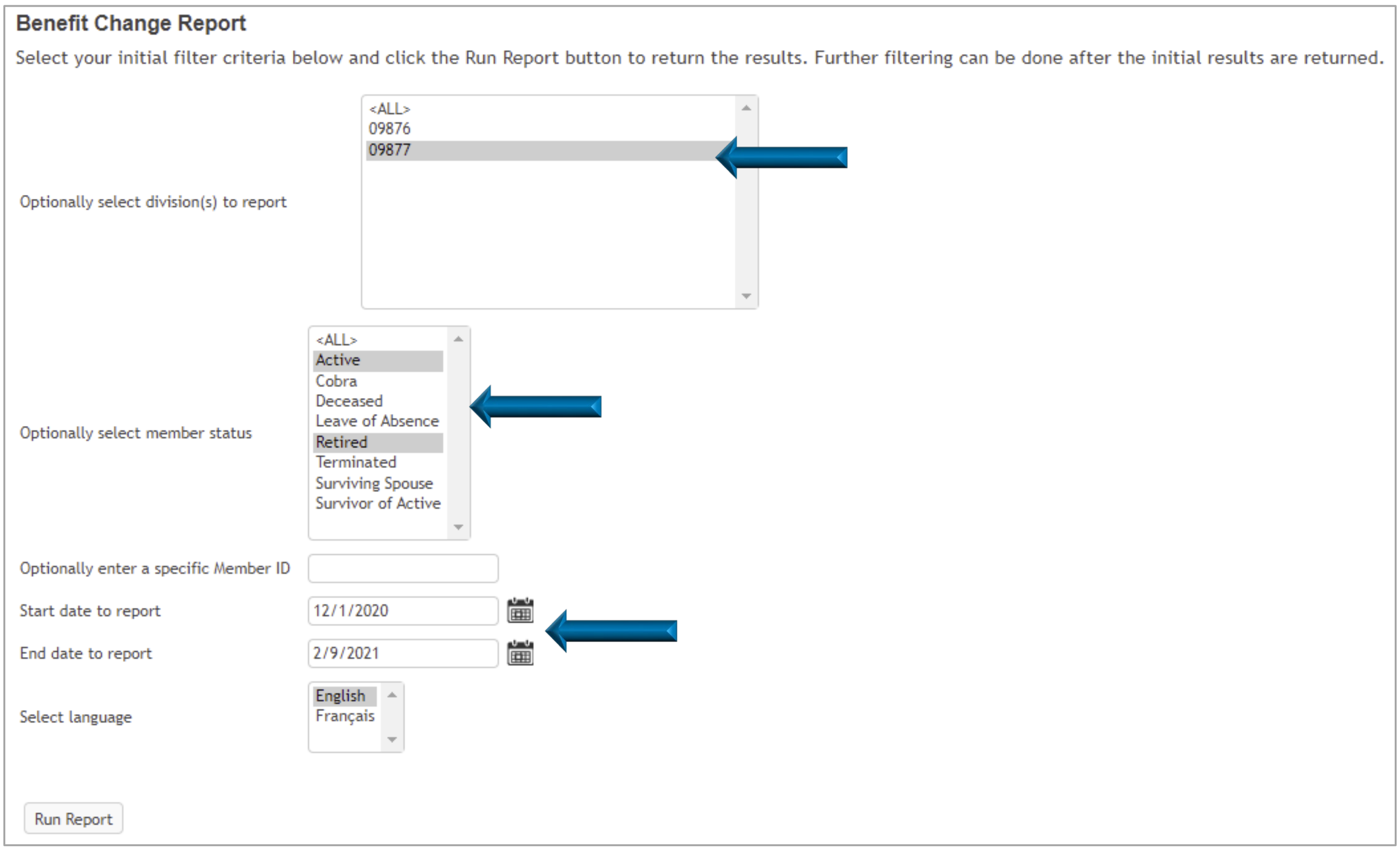
Custom Reports

Report	Description
Benefit Change Report	Benefit Change Report
Benefit Election	Benefit Election Report
Benefit Savings	This report provides employees of benefit savings in the selection criteria.
Billing Summary by State	Lists invoiced totals and participant count by group, entity, invoice date, and billing item for a chosen state
Estimated Salary	Estimated Salary

Report Criteria Options

When the menu appears with initial criteria options, select the specific reporting criterion. To select more than one criterion, use the Ctrl key. Enter the date range for the period you want to identify changes made by your participants. Note: The “End date to report” automatically defaults to the current date.

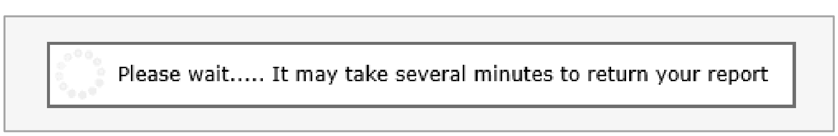
If you want to view a specific participant, enter the individual’s alternate ID number into the “Optionally enter a specific Member ID” field.



Generating Reports

Click on the “Run Report” button when you have finished selecting the various report criteria.

A message will appear on screen that lets you know the report is being generated.



The results based on the criteria you set will show directly on the screen.

Report Menu | Change Criteria | Reset Layout

Benefit Change Report

f(x) Formula | Filter | Add Chart

Table

Page 1 of 5

Organization	Organization Name	Employee ID	First Name	Last Name	Event name	Benefit event date	Prior Benefit Description	Prior Plan Description	Prior Option Description	Prior Amount/Percent Elected	Prior Amount/Percent Approved	Prior Amount Pended	Prior Total Monthly Premium	New Benefit Description	New Plan Description	New Option Description	New Amount/Percent Elected	New Amount/Percent Approved	New Amount Pended	New Total Monthly Premium
09877	Sample Company	001311	Barb	Test	New Hire/Newly Eligible	2021-02-01								24-Hour Accident	Waived	Waived	$0.00	$0.00	$0.00	$0.00
09877	Sample Company	001311	Barb	Test	New Hire/Newly Eligible	2021-02-01								Basic AD&D	Basic AD&D	Waived	$0.00	$0.00	$0.00	$0.00
09877	Sample Company	001311	Barb	Test	New Hire/Newly Eligible	2021-02-01								Hi-Limit Business Travel Accident	Hi-Limit BTA	BTA $50,000 Coverage	$50,000.00	$50,000.00	$0.00	$0.00
09877	Sample Company	001311	Barb	Test	New Hire/Newly Eligible	2021-02-01								Dental	Platinum Dental	Employee Only	$0.00	$0.00	$0.00	$62.00
09877	Sample Company	001311	Barb	Test	New Hire/Newly Eligible	2021-02-01								Disability	Long-Term Disability	Waived	$0.00	$0.00	$0.00	$0.00
09877	Sample Company	001311	Barb	Test	New Hire/Newly Eligible	2021-02-01								Basic Life	Basic Life	Waived	$0.00	$0.00	$0.00	$0.00
09877	Sample Company	001311	Barb	Test	New Hire/Newly Eligible	2021-02-01								Medical	A 2000/4000 with Platinum Rx	Employee Only	$0.00	$0.00	$0.00	$730.00
09877	Sample Company	001311	Barb	Test	New Hire/Newly Eligible	2021-02-01								Ret & Security	Retirement and Security	Retirement and Security	$0.00	$0.00	$0.00	$0.00
09877	Sample Company	001311	Barb	Test	New Hire/Newly Eligible	2021-02-01								Savings Plan	Profit Sharing Savings Before Tax	Waived	0.0%	0.0%	0.0%	0.0%
09877	Sample Company	001311	Barb	Test	New Hire/Newly Eligible	2021-02-01								Savings Plan	Profit Sharing Savings After Tax	Waived	0.0%	0.0%	0.0%	0.0%
09877	Sample Company	001311	Barb	Test	New Hire/Newly Eligible	2021-02-01								Savings Plan	Savings Plan	Eligible	0.0%	0.0%	0.0%	0.0%

The "Event Name" describes the change made by the participant and will be especially helpful to identify payroll-related updates. The "Benefit Event Date" shows the effective date of the specific event.

This shows the results for Barb Test, a new employee hired on February 1, 2021.

Employee Status	Organization	Organization Name	Employee ID	First Name	Last Name	Event name	Benefit event date
Active	09877	Sample Company	001311	Barb	Test	New Hire/Newly Eligible	2021-02-01
Active	09877	Sample Company	001311	Barb	Test	New Hire/Newly Eligible	2021-02-01
Active	09877	Sample Company	001311	Barb	Test	New Hire/Newly Eligible	2021-02-01
Active	09877	Sample Company	001311	Barb	Test	New Hire/Newly Eligible	2021-02-01
Active	09877	Sample Company	001311	Barb	Test	New Hire/Newly Eligible	2021-02-01

The columns after "Benefit event date" will show the most recent information prior to the participant's changes within the date range that was selected. Since Barb Test is a new employee, there is no prior information.

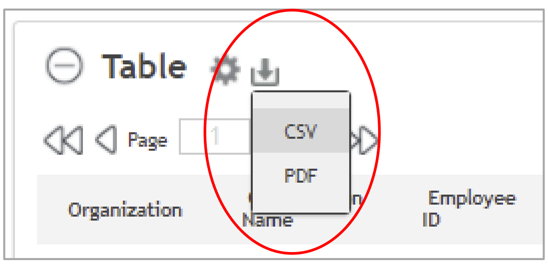
Event name	Benefit event date	Prior Benefit Description	Prior Plan Description	Prior Option Description	Prior Amount/Percent Elected	Prior Amount/Percent Approved	Prior Amount Pended	Prior Total Monthly Premium
New Hire/Newly Eligible	2021-02-01							

The remaining columns will display the "new" information and costs for the benefit plan changes made by your participants. This section of the report will help you easily identify the actions taken by the participant especially activity that may require payroll adjustments. Some changes may have no cost impacts (i.e., note the "Waived" coverages below with $0.00).

New Benefit Description	New Plan Description	New Option Description	New Amount/Percent Elected	New Amount/Percent Approved	New Amount Pended	New Total Monthly Premium
24-Hour Accident	Waived	Waived	$0.00	$0.00	$0.00	$0.00
Basic AD&D	Basic AD&D	Waived	$0.00	$0.00	$0.00	$0.00
Hi-Limit Business Travel Accident	Hi-Limit BTA	BTA $50,000 Coverage	$50,000.00	$50,000.00	$0.00	$0.00
Dental	Platinum Dental	Employee Only	$0.00	$0.00	$0.00	$62.00
Disability	Long-Term Disability	Waived	$0.00	$0.00	$0.00	$0.00
Basic Life	Basic Life	Waived	$0.00	$0.00	$0.00	$0.00

Quick Tip: Run this report on-demand for time periods based on your payroll frequency.

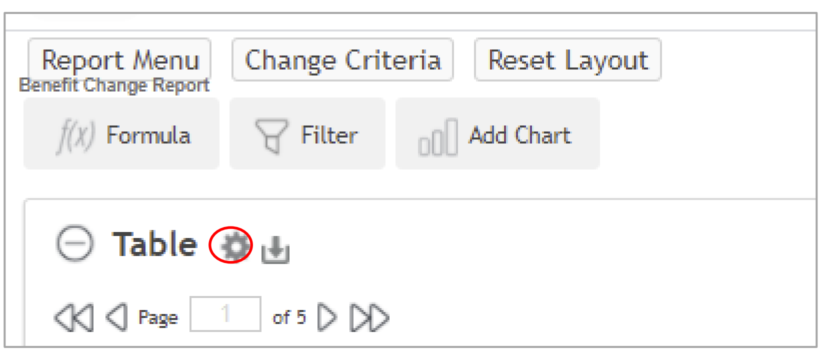
You can download the data into Excel and apply filters using Excel tools. Click the arrow icon and select CSV (Excel). A PDF format option is also available.



The PDF report will open in a new window and can be downloaded and saved from there. The CSV file will appear at the bottom of your screen and you will need to open it to save it.

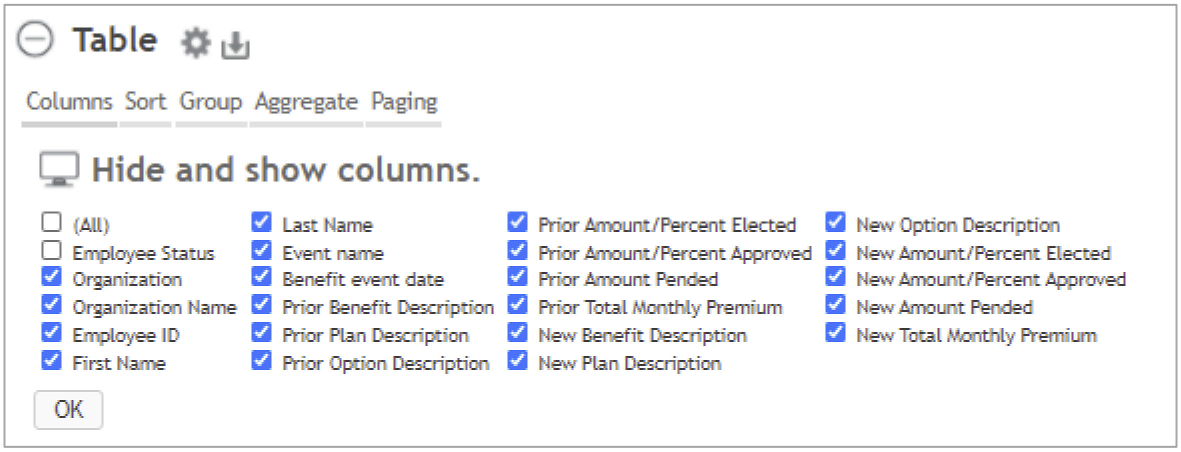
Additional Reporting Filter Options

Other filter options are available when you select the gear icon shown above the results table.



A list of data fields available on the selected report will be displayed, and it is easy to select the specific information you want to include on the report.

Quick Tip: Select “(All)” and click twice to deselect all columns. Then check the boxes beside the specific data element for your report and click “Ok”.

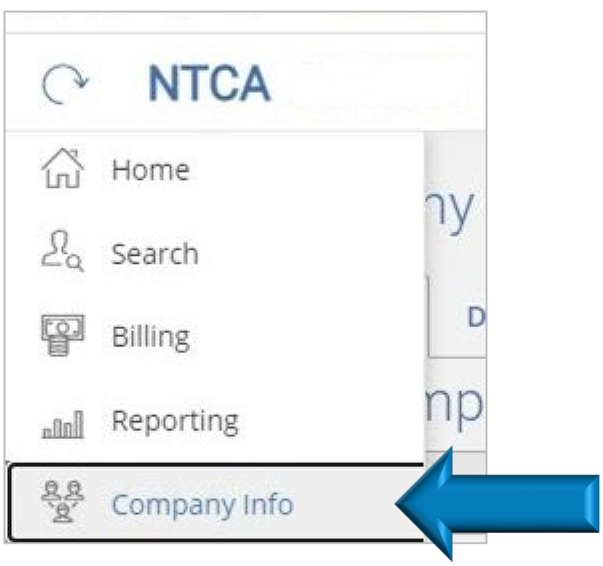


Scheduled Reporting

The Beneficiary Extract, Dependent Extract, Employee Extract and Benefit Change reports are automatically generated on a scheduled basis. This section describes when you will receive these four reports, the steps to customize the frequency for their receipt, how you are notified of their availability, where to find the reports and other helpful tips.

Selecting Scheduled Report Frequency

The default frequency of the scheduled reports is the first of each month. You can change the default frequency and customize the timing for receipt of these four automatically scheduled reports to a different frequency. Select the “Company Info” icon from the navigation bar on the left side of the home page screen.

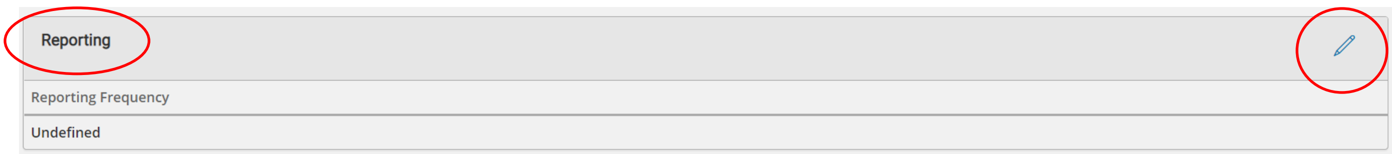


This panel will appear if you manage benefits for multiple companies. Select the company name from the drop-down menu to change the scheduled report frequency for a specific company. If you manage benefits for only one company, then the “Company Info” page will automatically open.

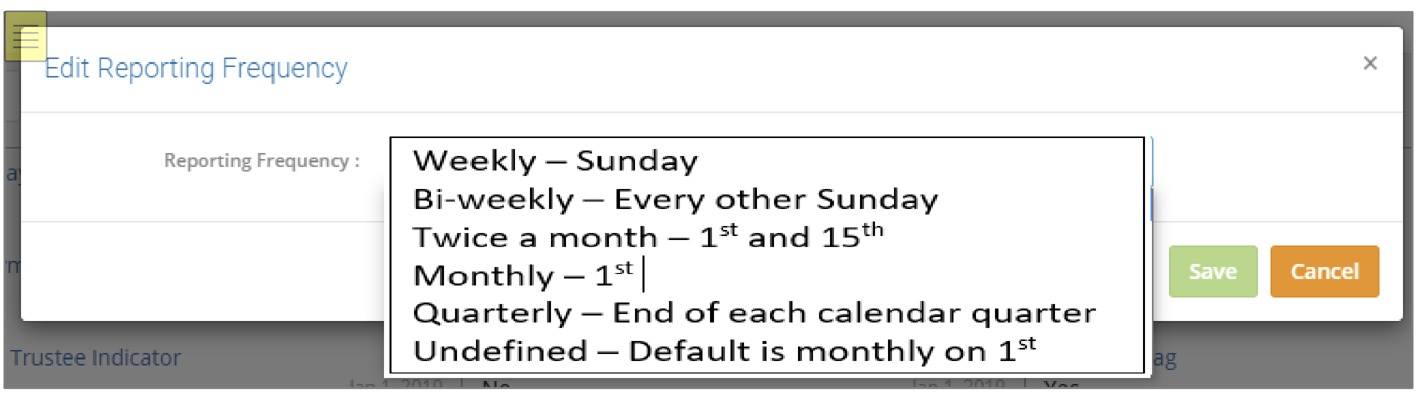
Quick Tip:

- You can select a different frequency for each company's set of reports if you manage benefits more than one organization. You cannot select a different frequency for each individual report or suspend receipt of the scheduled reports.

Your company details will show on this screen. You can update the scheduled report frequency in the "Reporting" section by clicking the pencil icon.

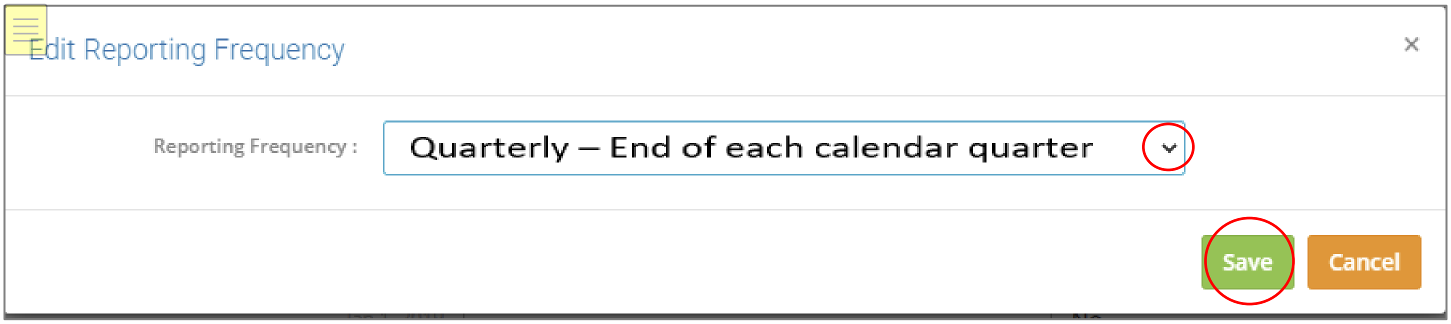


There are five frequency options for scheduling your reports. "Undefined" is the default frequency setting and is set for the first of each month. You can change the scheduled report frequency as often as you find necessary to meet your reporting needs.



** Reports are available in the morning of the scheduled frequency (i.e., the 1st day of the month).*

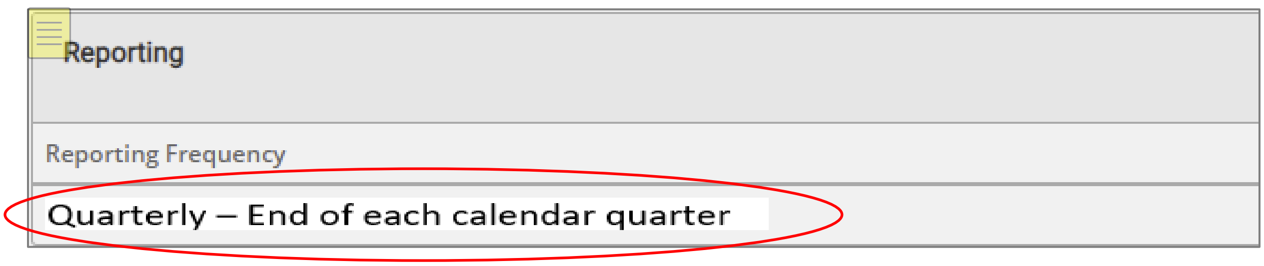
The following screen shows an example of selection of a quarterly reporting frequency. Click Save.



Quick Tips:

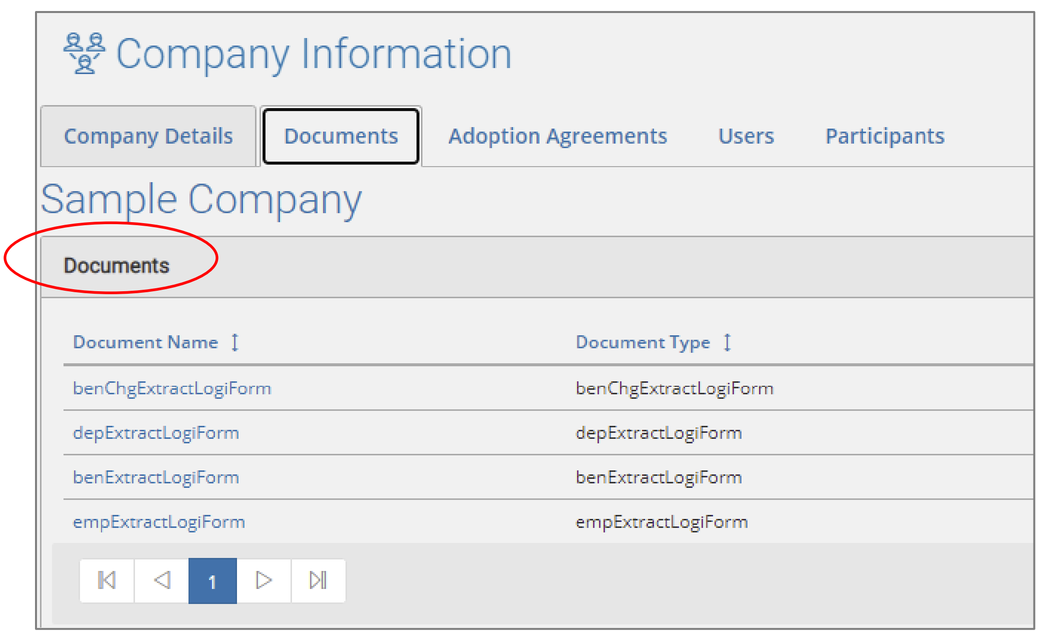
- To see benefit and other changes made by your participants on the participant portal during the past month, you should select the "Monthly" frequency. This will report a full month's activity on the Benefit Change Report.
- If you want to minimize the frequency to receive the automatically scheduled reports, select the "Quarterly" frequency.

On the "Company Info" screen, you will see the updated report frequency in the "Reporting" section.



Documents Tab

Scheduled reports are found in the "Documents" tab. Each report has a unique name under the column "Document Name".



For your reference, the chart below shows the report name with its corresponding document name.

Report Name	**Document Name**
Benefit Change Report	benChgExtractLogiForm
Dependent Extract	depExtractLogiForm
Beneficiary Extract	benExtractLogiForm
Employee Extract	empExtractLogiForm

Quick Tips:

- Scheduled reports are always generated in PDF format.
- Each report contains all available fields. If you need to customize the criteria section for a report (i.e., Employee Extract report for only active employees), you can use "On Demand Reporting."
- *My NTCA Benefits* will retain six months of reports in the "Documents" tab, and then automatically delete the oldest files so there is always only six months of reports on the site.
- The Benefit Change Report includes changes in participant records for a specific time period. If no changes are made within that time period, the report will still automatically generate but include no data.

Email Notifications

You will be notified by an email message that these scheduled reports are available in the Documents tab. If you do not update the frequency of the scheduled reports from the monthly default setting, the email is sent on the first day of the month to the company representative authorized to access these reports on *My NTCA Benefits*. If you customize the frequency to a different schedule, the email is sent in accordance with your selected frequency. For example, if you schedule your reports to generate quarterly, you will receive an email notification on the first day following the end of the preceding quarter. The email is sent by Morneau Shepell, NTCA's software vendor, from the email address donotreply@morneaushepell.com.

Cyber security is a priority for most companies, which may result in additional security measures that filter or block incoming emails or disable links in emails received from external sources. Please consult with your IT department or system administrator to be ensure you can receive emails from the morneaushepell.com domain.

Example Email Notification

From: donotreply@morneaushepell.com <donotreply@morneaushepell.com>
Sent: Sunday, March 7, 2021 10:00 AM
To: Sally Test <sallytest@sampletestcompany.org>
Subject: Your Administrator Reports are Available on My NTCA Benefits

Reports for NTCA member company **Sample Test Company, 09878** are available on the *My NTCA Benefits* portal. **Login at ntcabenefits-admin.ntca.org.** Select the **Company Info** icon and open the **Documents** tab to securely view, print or save the following reports.

Report Date	Report Name
03/07/2021	Benefit Change Extract
03/07/2021	Beneficiary Extract
03/07/2021	Dependent Extract
03/07/2021	Employee Extract

Your company reports will remain available on *My NTCA Benefits* for six months from the report date.

Questions?
NTCA benefits resource specialists are available for assistance at (828) 281-9000 or by email at benefitsresource@ntca.org, Monday - Friday from 9 a.m. to 8 p.m. ET.

Please do not reply directly to donotreply@morneaushepell.com. This email is used by an automated service that does not monitor reply emails.

Found this email in your spam or junk mail?
Add donotreply@morneaushepell.com to your safe senders list to make sure your report notification emails are delivered to your inbox.

NTCA has authorized our software vendor Morneau Shepell to provide this information so you can be assured of the legitimacy of this email message from donotreply@morneaushepell.com. If you have received this notice in error and you are not an authorized representative for Sample Test Company, 09878, please contact NTCA at (828) 281-9000, and delete and destroy this message and all copies.

Need More Help?

For additional assistance and questions, please contact our benefit resources specialists at (828) 281-9000 or benefitsresource@ntca.org. Our team is available Monday through Friday from 9 a.m. until 8 p.m. ET.

Latest News & Announcements

Starting September 1, 2021, we have changed some of the Group Health Program (GHP) medical plan names to better reflect their unique features and make it easier for participants to recognize your medical coverage election. This informational chart includes **all** NTCA GHP medical plans and may show medical plan(s) not available to you and your dependents.

Group Health Program Medical Plan Name Changes	
Current Name	**New Name**
Preferred Provider Organization (PPO) Plans	
Triple AAA PPO	Diamond PPO
Platinum PPO	Platinum PPO (no change)
Gold PPO	Gold PPO (no change)
Silver PPO	Silver PPO (no change)
Bronze PPO	Bronze PPO (no change)
Advantage Plans	
Triple AAA	AAA Advantage
Double AA	AA Advantage
Single A	A Advantage
High-Deductible Health Plans (HDHPs)	
HDHP Triple AAA PPO	Preferred HDHP
HDHP Single A	Select HDHP

What does this mean for you?

If you are enrolled in one of the renamed GHP medical plans, you will start seeing the new name, or an abbreviated version of the name, on your enrollment documents, future ID cards and other benefit plan information. The new name does not impact your coverage or benefits, and we are pleased to provide you and your family with exceptional health care services.

Questions?

Contact NTCA benefits resource specialists at (828) 281-9000, Monday – Friday, from 9 a.m. – 8 p.m. ET or by email at benefitsresource@ntca.org.