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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 user name 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.
Go to Group Billing:
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 “Billing Details” 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.”
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.
You can search transactions by:

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

### Additional Search Options

**View/Group By**

- Grouped By Item
- Grouped By Employee
- Grouped By Item, Employee, Billing Period
- Grouped By Item, Invoice, Billing Period, Employee

- **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.

<table>
<thead>
<tr>
<th>Billing Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>24 Hour Accident</td>
</tr>
<tr>
<td>Administrative Fee</td>
</tr>
<tr>
<td>Basic AD&amp;D</td>
</tr>
<tr>
<td>Basic Life</td>
</tr>
<tr>
<td>Child Life</td>
</tr>
<tr>
<td>Dental</td>
</tr>
<tr>
<td>Director 24 Hour Accident</td>
</tr>
<tr>
<td>Director AD&amp;D</td>
</tr>
<tr>
<td>Director Hi-Limit BTA</td>
</tr>
<tr>
<td>Director Life</td>
</tr>
<tr>
<td>Employee Hi-Limit BTA</td>
</tr>
<tr>
<td>Interest Fee</td>
</tr>
<tr>
<td>LTD</td>
</tr>
<tr>
<td>Medical</td>
</tr>
<tr>
<td>Insufficient Funds Fee</td>
</tr>
<tr>
<td>Retiree Dental</td>
</tr>
<tr>
<td>Retire Life</td>
</tr>
<tr>
<td>Retiree Medical</td>
</tr>
<tr>
<td>Spouse Life</td>
</tr>
<tr>
<td>STD</td>
</tr>
<tr>
<td>Supplemental AD&amp;D</td>
</tr>
<tr>
<td>Supplemental Employee Life</td>
</tr>
<tr>
<td>Supplemental Spouse Life</td>
</tr>
<tr>
<td>Wellness Incentive</td>
</tr>
</tbody>
</table>
- 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."

### Additional Search Options

<table>
<thead>
<tr>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>De minimus consideration</td>
</tr>
<tr>
<td>Fee Waiver</td>
</tr>
<tr>
<td>Interest Write Off</td>
</tr>
<tr>
<td>Miscellaneous</td>
</tr>
<tr>
<td>Prefunding Notional Account Contribution</td>
</tr>
<tr>
<td>Reallocation Credit</td>
</tr>
<tr>
<td>Write Off Credit</td>
</tr>
</tbody>
</table>

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

### Find Credits

#### Date Created

**Date Filter**

- Current Invoice Period
- Prior Invoice Period
- Custom Date Range
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’s 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 Group Health Program Billing

<table>
<thead>
<tr>
<th>Group #</th>
<th>Previous Balance</th>
<th>Amounts Paid</th>
<th>Amounts Involved</th>
<th>Adjustments</th>
<th>Credits</th>
<th>Total Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>08876</td>
<td>$1,750.00</td>
<td>$0.00</td>
<td>$831.47</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$2,581.47</td>
</tr>
</tbody>
</table>

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. - 5 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: $2,581.47
Amount Paid: 

Group #: 08876
Test Company

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

Processed 11/20/2019
NTCA Retirement and Security Program Billing

<table>
<thead>
<tr>
<th>Group #</th>
<th>Previous Balance</th>
<th>Amounts Paid</th>
<th>Amounts Invoiced</th>
<th>Adjustments</th>
<th>Credits</th>
<th>Total Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>09876</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$5,555.56</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$5,555.56</td>
</tr>
</tbody>
</table>

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.nica.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.

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Please Do Not Send Correspondence with Payment.

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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, you will be presented a “Select Company” panel.

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

Company Details

Information on this screen includes:

**Basic**
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. You will find a quick way to locate the NTCA member relations manager assigned to your company.

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

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. Select “Yes” from “Show Terminated Contracts”.

Feature History
The icon under the “Actions” column navigates to a Feature History screen to view a history of Adoption Agreement amendments (by effective date) for a specific plan. To view the history, highlight a specific plan and select the “Download Excel File” under the “Action” column.

This example screen shows the action of downloading the Excel file when a company added Supplemental Life coverage to the Group Health Program Adoption Agreement.
Select “Return to Contracts” to navigate back to the Adoption Agreement tab.

**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 doesn’t necessarily mean your company has elected benefits for the group(s). Also, there may not be any participants at your company in these groups.

Group Plans
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.
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.

**Status**
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.

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.

**Employee ID**
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.

**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

October 2019
L = Leave of Absence  
C = COBRA

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

Information on this screen includes:

Employment status data

Estimated Salary  
This is the amount used for billing benefit plan contributions.

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

Lifetime Extension of Coverage  
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.
Flex Plan (Section 125) Contributions
A summary of employer and/or employee contribution elections by the participant to the FSA (Flexible Spending Account) can be viewed from this panel.

GHP Wellness Connections Plan Incentives
Wellness plan incentive earnings and medical plan rate reductions are displayed in this area.
Disability Approval Data
Information about the status of short-term disability (STD) or long-term disability (LTD) applications for a participant is easily viewed on this screen.

<table>
<thead>
<tr>
<th>Online or Telephonic Coaching Programs Spouse Bill Date</th>
<th>STD Approval Date</th>
<th>Non-NTCA Disability Indicator</th>
<th>NTCA Disability Indicator</th>
<th>Frozen Estimated Salary as of Disability Date of Loss</th>
</tr>
</thead>
<tbody>
<tr>
<td>Disability Date of Loss</td>
<td>Disability Payment Begin Date</td>
<td>Disability Application Approval Date</td>
<td>Disability Waiver Effective Date</td>
<td>Disability End Date</td>
</tr>
<tr>
<td>Max Duration Date</td>
<td>Group Life Waiver of Premium Status</td>
<td>Frozen Employer Paid Surcharge Rate</td>
<td>Frozen Upcharge Rate</td>
<td>Frozen Upgraded Employee Contribution Rate from Disability Date of Loss</td>
</tr>
<tr>
<td>Frozen Upgraded Employer Contribution Rate from Disability Date of Loss</td>
<td>LTD Rule of ES</td>
<td>Disability Employee After Tax MP Contribution</td>
<td>Disability Employee After Tax PS Contribution</td>
<td>Premium Waiver Medical</td>
</tr>
<tr>
<td>Premium Waiver RJS</td>
<td>Premium Waiver Savings</td>
<td>Premium Waiver Supplemental AD&amp;D</td>
<td>Premium Waiver Supplemental AD&amp;D</td>
<td>-</td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th></th>
<th>Savings Plan</th>
<th>Profit Sharing Savings Before Tax</th>
<th>Profit Sharing Savings Before Tax</th>
<th>$0.00</th>
<th>$0.00</th>
<th>$0.00</th>
<th>01/01/2019</th>
<th>Eligible (01/01/2019)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Savings Plan</td>
<td>Profit Sharing Savings After Tax</td>
<td>Profit Sharing Savings After Tax</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>01/01/2019</td>
<td>Eligible (01/01/2019)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Benefit Cost**

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 located in the “Company Billing” area of the portal and from the Employee Billing icon.
- If your company provides cost-sharing data to NTCA, this screen will display the breakdown of costs between employer and employee.
Event (Effective Date)

<table>
<thead>
<tr>
<th>Event (Effective Date)</th>
<th>Coverage Start Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Hire/Newly Eligible (01/01/2019)</td>
<td>01/01/2019</td>
</tr>
</tbody>
</table>

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”.

An “Event History” screen will open. The “Status” tab shows if the event has been processed or if it is still in progress.
The “Coverage” tab shows which coverage options are available, elected or waived by the participant.

![Event History Screen]

Click the ‘X’ in the top right corner of the “Event History Status” or “Coverage” screens or select the orange “Cancel” button on the Event History panel to return to the main “Coverage” screen.

**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.

![Dependent Coverage Table]

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*Image: Example of dependent coverage data.*

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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.

<table>
<thead>
<tr>
<th>Coverage History</th>
</tr>
</thead>
<tbody>
<tr>
<td>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.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Enrollment History</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select the “Enrollment History” icon from the participant navigation menu to view events processed for the participant.</td>
</tr>
</tbody>
</table>

| 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.

**Enrollment History Status**
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.)

![Enrollment History](image)

**Enrollment History Coverage**
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”.

![Employee Billing](image)

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).

![COBRA Icon](image)

This screen includes:

**Qualifying Event Date**
The effective date of COBRA coverage if elected by the beneficiary.

**Status**
The current status of COBRA coverage and reflects one of these status descriptions.

![Status Options](image)

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 or 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.
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.
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.

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.

Report Selection

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

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 or close the reporting browser once you are done using the Reporting Tool.

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| My NTCA Benefits | X | Standard Reports | X |
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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.
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 ’2020-01-01’ to see the status of participant’s 2020 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.
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.
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.
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.

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. If that event does not display, just open the drop-down menu and select that event.
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 01/01/2020 if you are running the report for the 2020 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.
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.