New Hire Verification of Eligibility

NOTE: Trustors that utilize a payroll import to the BAS system will be exempted from this process.

# New Hire Verification of Eligibility Documentation Workflow Narrative

1. Reta/BAS will educate administrators about the new eligibility documentation process and emphasize that the administrators should have their new hire’s supporting documentation ready PRIOR to entering the new hire record in RetaEnroll. Ready will mean either scanned and prepared for upload or printed and ready to fax to BAS.
2. If an administrator chooses to fax the documentation to BAS, the New Hire wizard will prompt the administrator to print a special bar coded fax cover sheet that will identify the specific new hire for the BAS fax servers. The bar code on the coversheet will enable the fax server to attach the documents to the exact new hire’s record, automatically, 24/7.
3. New hire records will pend the receipt of supporting documentation by BAS. BAS will review submitted documentation on a daily basis during regular office hours. System will not allow pended new hire record to be released without attached document being opened to ensure review before release. BAS will notify administrators via email (no notification to employees) of documents submitted and approved (no further action on any party’s behalf required). BAS will notify administrators of documentation received that is unacceptable and request replacement documentation. BAS will send an email weekly reminding administrators of all new hire records that are in a pending status.
   1. Acceptable forms of supporting documentation are:
      1. Pay Check Stub
      2. Time Card
      3. Payroll System Screen Shot of Employee Record
      4. Employment Contract
      5. AB 1825 New Hire Form
4. Once the new hire has been released from pending, the employee will have a new hire enrollment period equal to the date of release plus the trustor’s standard new hire enrollment days (e.g. 30 days).

# New Hire Verification of Eligibility Documentation Workflow

Administrator add employees into RetaEnroll

NO

YES

New Hire Enrollment Period

YES

Email Notification to Administrator

NO

YES

Documentation Approved

Documentation reviewed by BAS

Fax documentation to BAS

NO

Upload documentation

**Employee’s Employment Status Documentation**

**Selected Employee:** <Full Name>

Before this employee can be released into an “Active” status services including, but not limited to benefits enrollment, your group requires that you substantiate the employee’s employment. Here are the next steps:

1. Use the document upload function below, or fax to us, your documentation that substantiates the employee’s employment status (View Valid Documentation).
2. Within 24-business hours of your upload/fax of the complete/valid documentation in step one above, BAS will review your submission. If the documentation is acceptable, we will release the employee from pending to active status. If we have any questions about your submission, we will contact you. Please confirm your contact information below

**Your Contact Information**

**Name** <Administrator’s Full Name>

**Phone** Edit <Phone>

**Email** Edit <Email>

Reset Save

**Document Submission**

**Selected Employee:** <Full Name>

**Choose One**

○ Upload an electronic image

○ Fax your documentation

**Document Submission via Upload**

**Selected Employee:** <Full Name>

**Select Document from Your Computer**

If you don’t have the document converted to a PDF or other electronic document, please do make the conversion now and store the document on your PC. Afterwards, return to this screen and perform the upload.

**Multiple Documents:** You may submit as many separate documents as necessary. Simply, click the Browse button, select the document, click Save, and repeat as many times a necessary.

Browse \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Save

**Documents Selected for Submission**

|  |  |
| --- | --- |
| **Action** | **Document Name** |
| Remove | ABC.doc |

Clear List Upload All Documents

|  |
| --- |
| **Upload Confirmation**  This will confirm that <#> documents uploaded successfully.  Close |

Upon upload, clear documents in grid above

**Document Submission via Fax**

**Selected Employee:** <Full Name>

Click the “Print Fax Cover Sheet” button below. This process will print an EMPLOYEE-SPECIFIC fax coversheet on your printer that you must use to submit your documents.

**Note**: If you are processing 2 or more employees, you MUST use separate fax cover sheets for each. We have this requirement because each fax cover sheet contains a bar code specific to each employee and enables our fax servers to automatically attach the employees’ documents to their individual accounts.

**Print Fax Coversheet** Print Now

Finished with this Employee