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| **DOCUMENT DETAILS** | |
| **CLIENT NAME** | Maxor National Pharmacy |
| **LAST MODIFIED DATE** |  |
| **TECHNICAL CONTENT** |  |
| **SOLUTIONS ARCHITECT** |  |

# Description

The benefits file provides information regarding all employees who were enrolled, waived, or who have been offered medical coverage for at least one day during the reporting period.

# Purpose

Medical coverage offers and enrollments are utilized in conjunction with HRIS and Payroll files to determine monthly compliance. At least 95% of ACA eligible employees must appear on the benefits file as either enrolled, waived, or offered coverage on a monthly basis.

# Frequency

At least monthly.

# Historical Files

The Health e(fx) system implementation will require historical data to be loaded for creation of the 1095 and 1094 tax forms. Provide files from the beginning of the current reporting year. The files should be a monthly snapshot of the benefit information that occurred that month.

# File Naming Convention

Files must be transmitted with the naming convention established during implementation, to support automatic data file consumption by the Health e(fx) system.

# Data Selection Criteria

Select all employee’s enrolled in or offered medical coverage for at least one day during the reporting period. Any individual that has added coverage, waived coverage, or terminated benefit coverage should be included. If employee is an active employee enrolled in COBRA coverage, those individuals should be included on this file.

# Benefits File Specification

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| --- | --- |
| **REPORT SETUP INFORMATION** | |
| **FILE FREQUENCY** | Monthly to report elections at end of prior month |
| **FILE NAMING CONVENTION** | maxor\_bendep\_yyyymm.txt |
| **FILE ORIGIN** | UltiPro |
| **FILE FORMAT** | Pipe Delimited Text |
| **HEADER/TRAILER** | Header record required; No trailer record |
| **DETAIL RECORD** | Employees and dependents offered coverage in self-funded plans |

# Required Data Elements – all benefits active, termed or waived for medical – MEDBC or I5

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| --- | --- | --- | --- | --- | --- | --- |
| **#** | **Health e(fx) Field / Description** | **Data Type (Max)** | **Required?** | **Sample Values** | **Client Column Header** | **Mapping Notes** |
| 1 | **Employee SSN**: Employee Social Security number. Please send numeric data only with no dashes. Leading zeros do not need to be sent. | varchar(50) | REQUIRED | 9-digit number | **SSN** | Eepssn |
| 2 | **Dependent Social Security number**. If no SSN, send value as blank. Please send in clear text form with no dashes. Leading zeros do not need to be sent. | varchar(50) | REQUIRED | 9-digit number |  | Conssn – if all 9’s or all 1’s leave blank |
| 3 | **Relationship**: Indicate the relationship of the dependent to the employee. | varchar(50) | REQUIRED | Child, Spouse C; S |  | conrelationship |
| 4 | **Waived Coverage Indicator**: Opt-Out indicator of medical coverage for the current plan year. | bit | REQUIRED | Yes, No; 1, 0; T, F; Y, N; True, False | **OPTOUT** | If EedBenStatus = W send Y else leave blank |
| 5 | **Offer Date**: Medical coverage effective date that was offered to eligible employee.  New hire – eedbenstarte date  Life events – do not change date until 1/1 | date | REQUIRED | YYYYMMDD  MM/DD/YYYY | **OFFER\_DATE** | If new hire during date range of file send eedbenstartdate  Else send 1st of month following EecDateOfBenefitSeniority  if prior to 1st of current year send 1st of current year  (this date should change each January 1st) |
| 6 | **Plan Name**: Name of health coverage plan (e.g. PPO Plan, HMO Plan). For anyone that has waived coverage, leave value plan and send opt-out code. | nvarchar(150) | REQUIRED | Medical PPO | **PLAN\_NAME** | If EedBenStatus <> W send dedlongdesc in DedCode table where DedCode = eeddedcode |
| 7 | **Plan Tier**: Indicator of coverage tier selected during enrollment administrative period (i.e. single or with dependents). | varchar(200) | REQUIRED | Employee Only; Employee + Children; Employee + Spouse; Family | **PLAN\_TIER** | bnoDescription in BenOpt table were bnoCode = eedbenoption |
| 8 | **Plan Provider**: A value is not required unless it is necessary in order to determine plan offering. | varchar(50) | REQUIRED | Aetna, BCBS | **PROVIDER** | If eeddedcode = MEDBC send BCBS  If eeddedcode = I5 send Kaiser |
| 9 | **Employer Premium**: Actual cost that employer pays monthly for elected plan. If the file is not sent monthly, confirm the frequency amount reflected on the file. - ER amt x26 /12 – monthly | money | REQUIRED | 1100.00 | **EMPLOYER\_PREMIUM** | get ER rate from OptRate table based on EedBenOption and PgrPayFrequency x26 divided by 12 |
| 10 | **Employee Premium**: Actual cost that employee pays monthly for elected plan. If the file is not sent monthly, confirm the frequency amount reflected on the file - EE amt x26 /12 – monthly | money | REQUIRED | 95.00 | **EMPLOYEE\_PREMIUM** | get EE rate from OptRate table based on EedBenOption and PgrPayFrequency x26 divided by 12 |
| 11 | **Plan Effective Date**: Effective date employee begins coverage on the plan. | YYYYMMDD | REQUIRED | YYYYMMDD  MM/DD/YYYY | **PLAN\_EFFECTIVE\_DATE** | eedbenstartdate |
| 12 | **Plan Exit Date**: Last date of benefits coverage. If employee is not included on benefit file, Health e(fx) assumes they are no longer covered and will look to collect a plan exit date. | YYYYMMDD | REQUIRED | YYYYMMDD  MM/DD/YYYY | **PLAN\_EXIT\_DATE** | eedbenstopdate– do not send future term dates |
| 13 | **First name of dependent** | varchar(50) | REQUIRED | JOHN | **DEP\_FIRST\_NAME** | connamefirst |
| 14 | **Last name of dependent** | varchar(50) | REQUIRED | DOE | **DEP\_LAST\_NAME** | connamelast |
| 15 | **Date of Birth**. Must contain a four digit year | date | REQUIRED | MM/DD/YYYY | **DEP\_DOB** | condateofbirth |
| 16 | **Effective Date dependent begins coverage on the plan**. | date | REQUIRED | MM/DD/YYYY | **DEP\_EFFECTIVE\_DATE** | DbnBenStartDate |
| 17 | **Date dependent exits the plan**. | date | REQUIRED | MM/DD/YYYY | **DEP\_EXIT\_DATE** | DbnBenStopDate – do not send future term dates |