easeConnect 834

BROKER GUIDE

Updated Dec 29, 2021

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INTRODUCTION

Ease has built a broker self service tool that allows eligibility data to be transmitted to the carrier on a scheduled basis via a secure SFTP/FTP portal. The broker, not Ease, is the contact for the carrier when using EaseConnect 834. Ease supports the broker in resolving issues related to Mapping or Carrier required fields, if/when errors occur. An EDI 834 file must abide by HIPAA 5010 standards. The 834 file includes demographic information on the employee, including the plan subscriber's name, plan network information, eligibility and benefit information.

BEFORE YOU BEGIN

To get started, reach out to the carrier sales representative and request approval for the employer group to establish an 834 EDI file connection between Ease and the insurance carrier. Once the employer group has been approved by the carrier, the broker can complete the EaseConnect 834 - Carrier Connection Request Form and provide the account structure, file specifications, companion guide, and SFTP information to Ease.

Pricing

License Tier	**New Carrier Set Up Fee** (Fee is only charged if/when the carrier is not active on EaseConnect834. If carrier is already connected on EaseConnect834, no fee will be charged to the Agency)	**PEPM** (Per Enrolled Subscriber Per Month)	**Maximum PEPM Cost Per Agency** (Broker Agency can have more than 2500 enrolled employees per month on EC834, but **Enterprise** license will not pay for more than 2500 enrolled employees per month)
Pro	Not Available	Not Available	Not Available
Agency	$500	$0.45	No maximum
Enterprise	$500	$0.25	$625 per month ($0.25 x 2500 = $625)

EaseConnect 834 is available for our Agency (available 1/1/2022) and Enterprise (available 10/01/2021) customers:

Products Supported on EaseConnect 834

- Medical
- Dental
- Vision
- Prescription

Note: You must use the correct "Plan Type" in Ease.

LIMITATIONS

- At this time, EaseConnect 834 is limited to **Agency** and **Enterprise** subscriptions with Ease. Please contact your **Account Executive** to update your subscription level.
- To streamline the set up and error discrepancy reports, Ease encourages each agency to have a dedicated representative for EaseConnect 834.
- A "Test File" is required for each new client added to the carrier transmission. After the test file has been approved, the file can be moved into production. (File Naming Convention may need to be updated at this time)
- Initial client size for EaseConnect 834 is limited to clients with 75 or more enrolled subscribers.
- Carriers may have limitations on adding new EDI requests during the 4th Quarter or within 60-90 days from renewal. This varies by carrier, so please confirm with your carrier representative.

CONNECTED CARRIERS

Listing of Carriers Currently Connected with Ease

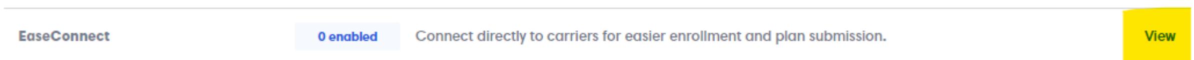
Click here for an updated list of carriers that are published with EaseConnect 834.

GETTING STARTED

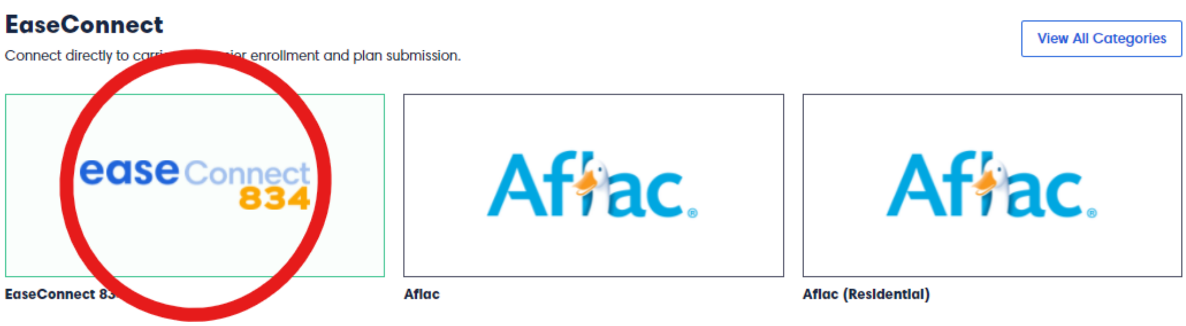
After a new carrier is mapped successfully, the broker can enable EaseConnect 834 on a per client basis in the Marketplace.

Steps to map a client on EaseConnect 834 (carrier must approve EDI file feed before this process start)

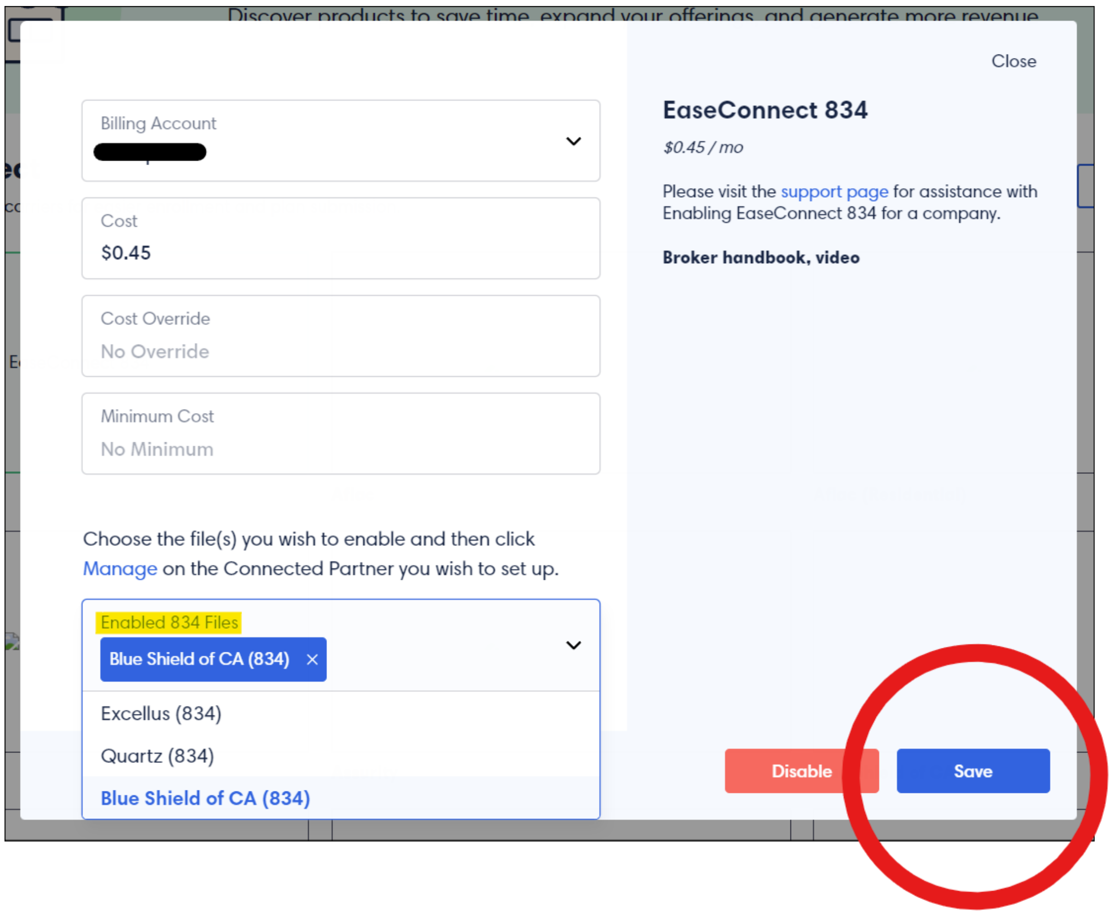
1. Go to **Marketplace**.
2. Click **View** next to **EaseConnect**.



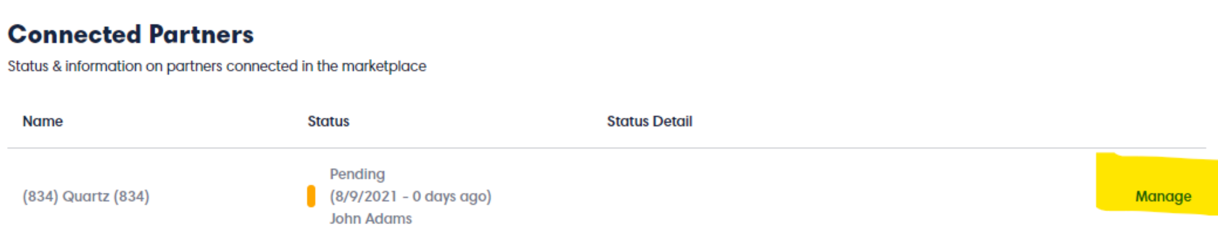
3. Go to **EaseConnect 834.**



4. Click **Enable Partner** and choose **[carrier] (834)** and **Save.**

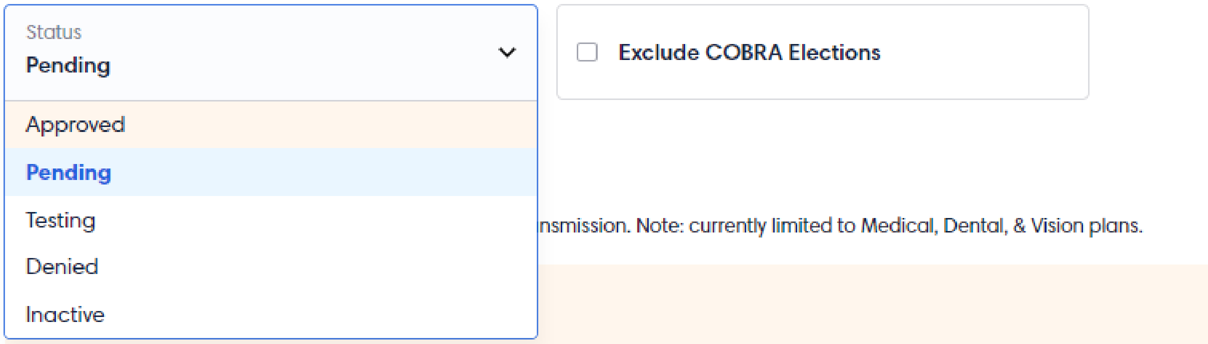


5. Go to **Client** > **Profile > Overview > Connected Partners.**
6. Click **Manage** next to **(834) [carrier] (834).**

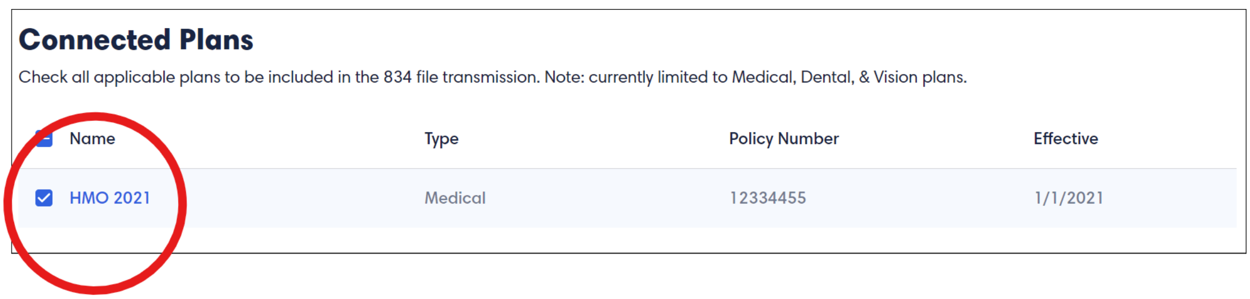


7. Confirm **Status** is valid.
   - Pending = initial plan setup
   - Testing = when employer group data is being analyzed by [carrier] 834

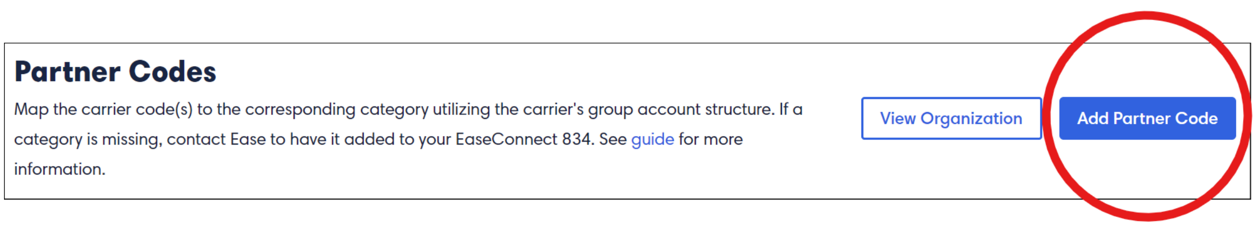
- Approved = when employer group is in production with [carrier] 834



8. Include **Connected Plans.**
   - Check all applicable [carrier] 834 plans
   - If plan(s) are not already configured, continue to **Configure Plan** to add associated plans

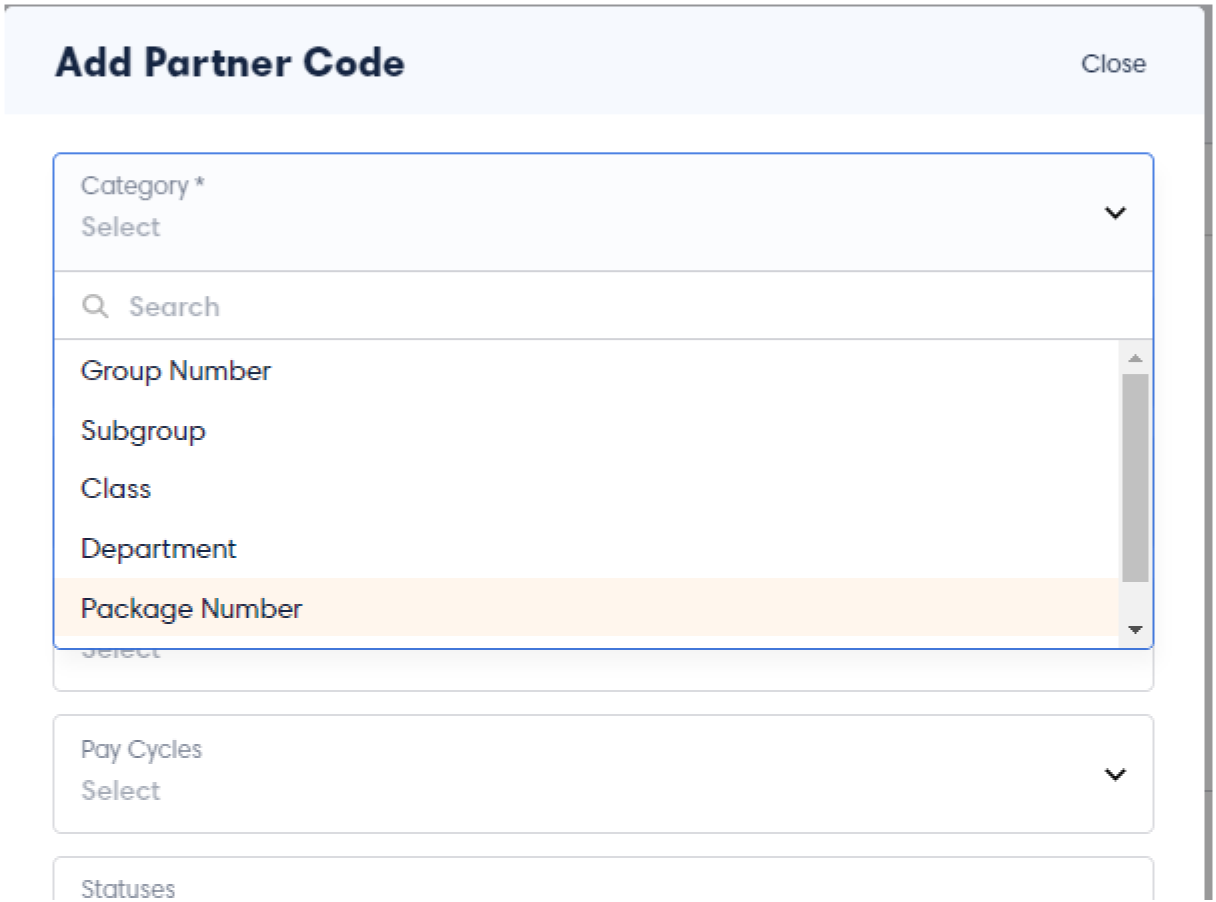


9. Add **Partner Codes,** if necessary.

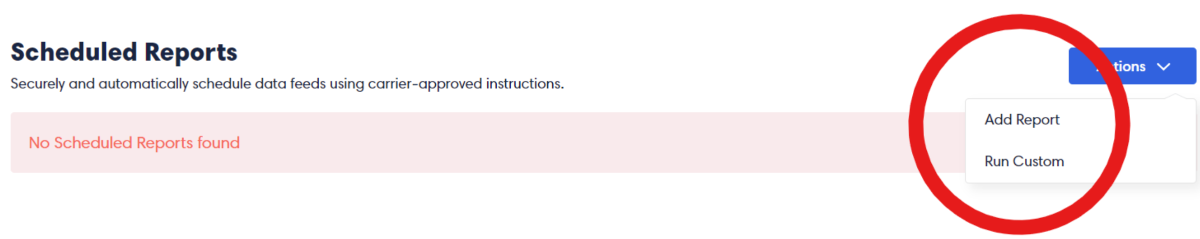


10. Choose **Category** from drop down menu.
    - Categories were added during set up as Partner Code Categories
    - If a category is missing, contact Ease at easeconnect834@ease.com to have it added to your broker EaseConnect 834 setup
    - Add the Name and Code from broker portal EaseConnect 834 setup
    - Complete the information in the dialog box as it pertains to the chosen Category; i.e. for Group Number, add the location, etc that pertains to that group number

- Click Add Partner Code
- Repeat for all Categories and/or Partner Codes

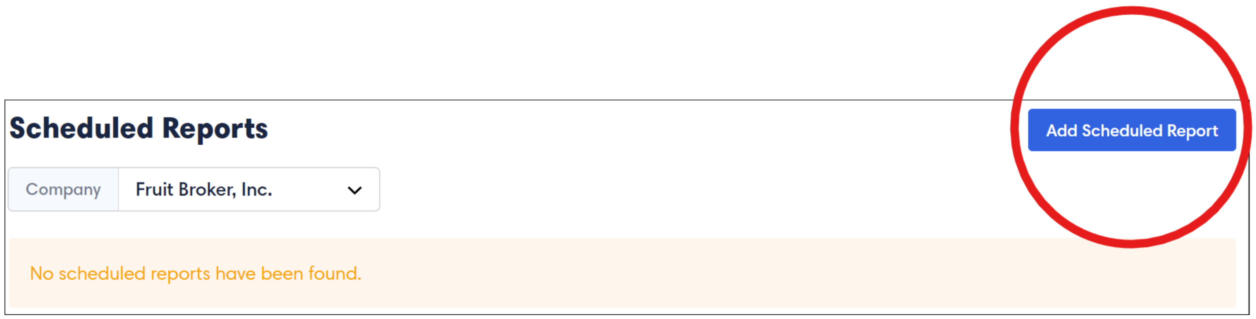


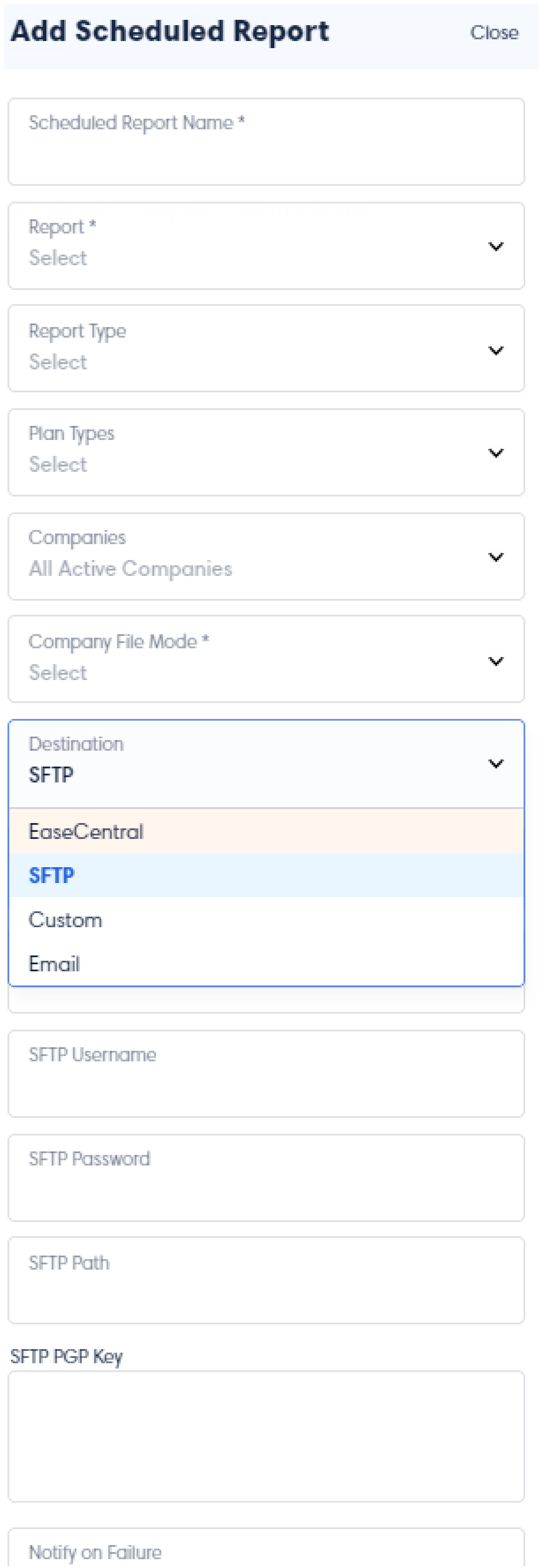
11. Click **Actions** under **Scheduled Report** section and choose **Add Report** option.



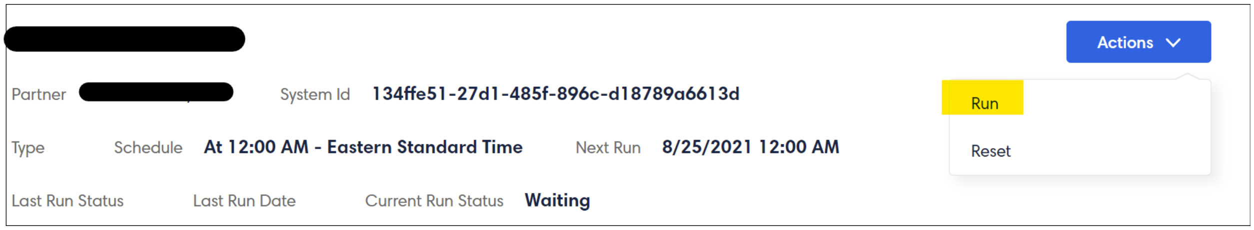
12. Click **Add Scheduled Report** and complete all applicable fields (This step is only required when setting up your agency's first employer group with [carrier] 834).
    - Scheduled report name
    - Report (this will be connected EC834 carrier name)

- Report Type (testing or production)
- Companies (See directions below for adding clients to Scheduled Report)
- Company File Mode (Aggregate/Multi or Seperate/Single)
- Destination (SFTP)
- SFTP Host (included in carrier directions)
- SFTP Port (included in carrier directions)
- SFTP Username (included in carrier directions)
- **SFTP Password (included in carrier directions)**
- SFTP Path (included in carrier directions, if necessary)




Add Scheduled Report
Close
Scheduled Report Name *
Report *
Select
Report Type
Select
Plan Types
Select
Companies
All Active Companies
Company File Mode *
Select
Destination
SFTP
EaseCentral
SFTP
Custom
Email
SFTP Username
SFTP Password
SFTP Path
SFTP PGP Key
Notify on Failure

13. Click **View** under **Scheduled Report** section to view history of reports.
    - Generate Test 834 file
        - Select file name

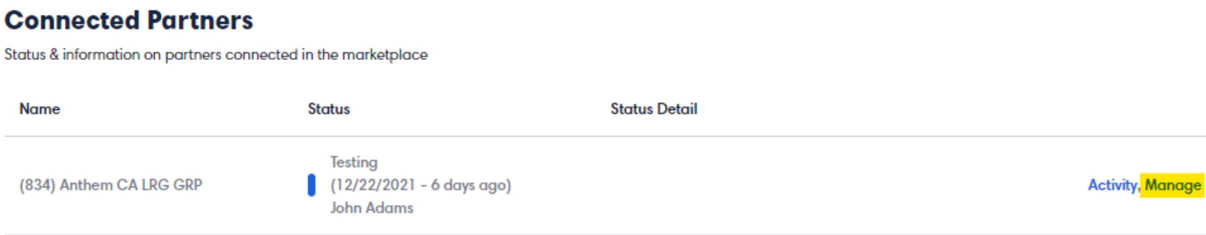


        - Click **Actions**
        - Choose **Run**
14. Review **Discrepancy Report** from carrier and make corrections.
    - Carrier reports are received outside the Ease system
    - Discrepancy reports vary by carrier, please contact your carrier for information on how discrepancy reports are distributed
15. Continue testing until you get approval from carrier to move to production.
16. Once approved, move **Status** to **Approved**.
    - File name may need to be updated for new [carrier] 834

ADD/REMOVE CLIENTS from SCHEDULED REPORTS

Clients are added **automatically** to the scheduled report for each carrier. We recommend creating a “test” Scheduled Report and a “Production” Scheduled report so reports are updated accurately. The “Status field” for each client drives the process for adding the client to “Test” or “Production” report.

1. Go to **Client > Profile** and scroll to **Connected Partners** section.
2. Find carrier and click **Manage**.



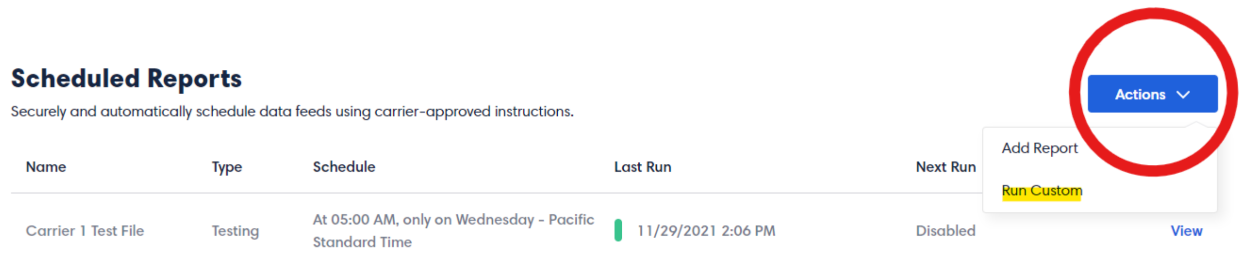
3. Update “**Status**” for client based on direction from carrier.

4. Status Definitions
    - **Approved** - Use this option when the carrier approves the client for Production”
        - Clients with this setting are automatically added to the **“Production” Scheduled Report** for this carrier.
    - **Pending** - Use this option when the client is starting the connection process and it should not be added to **“Testing”** or **“Production”** file.
    - **Testing** - Use this option when submitting a **“Test”** file to the carrier
        - Clients with this setting are automatically added to the **“Test” Scheduled Report** for this carrier.
    - **Denied** - Use this option if the carrier has denied the client access to submit an 834 file feed.
    - **Inactive** - Use this option if the client has stopped submitting EDI 834 files to the carrier.

SENDING OPEN ENROLLMENT OR TEST FILE

Steps to send Open Enrollment files for a client using EaseConnect 834:

1. Go to **Client** > **Profile > Overview > Connected Partners**.
2. Click **Manage** next to **[carrier] (834)**.
3. In **Scheduled Reports**, click **Actions** and choose **Run Custom**.



4. **Click File Report** for **[carrier] (834)** from drop down list.
5. Add Open Enrollment file name.
6. Mark **Plans** to include in open enrollment or test file and click **Run.**
    - Partner Codes need to be updated to include Open Enrollment plans and account structure changes from the carrier before submitting the Open Enrollment file.

Run Custom

Close

Scheduled Report *

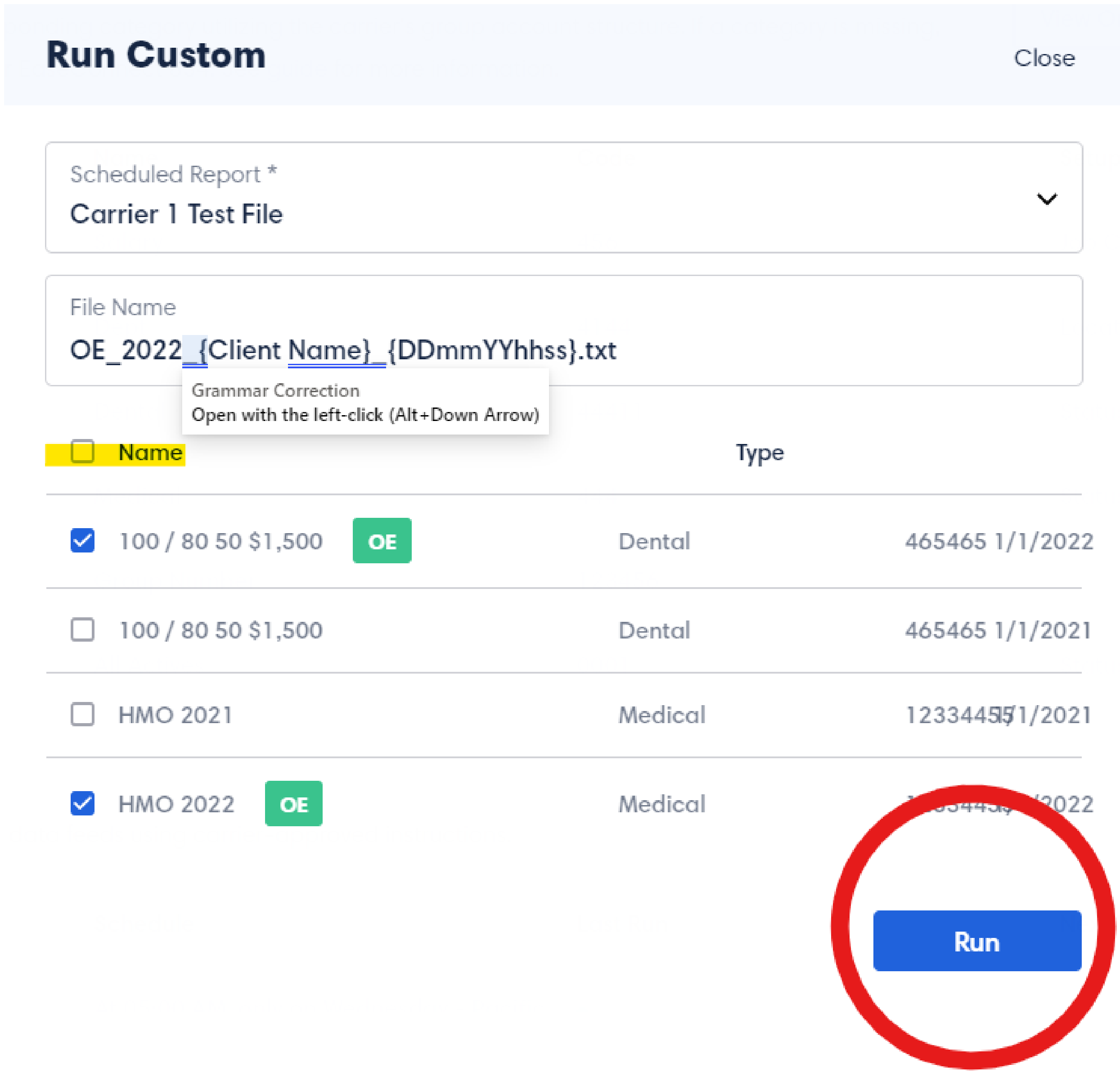
Carrier 1 Test File

File Name

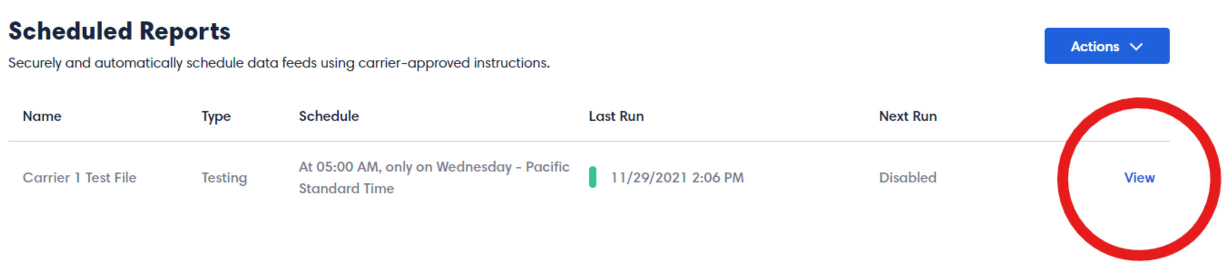
ADD OPEN ENROLLMENT TEST FILE NAME HERE (Use carrier preferred File Name)

Name	Type	Start Date
100 / 80 50 $1,500	Dental	1/1/2021
Anthem Silver PPO 2500/35% w/HSA PrevRx (Prudent Buyer)	Medical	12/1/2021
HMO 2021	Medical	1/1/2021
HMO 2022 OE	Medical	1/1/2022
HPN Balance HMO Silver 45/7000/30%	Medical	12/1/2021
Pediatric Dental	Pediatric Dental	1/1/2022

Run



7. To view report, click **View** next to **Scheduled Report** and review your open enrollment or test file from **Report History.**



Report History

User	Start Date	End Date	Status	
[redacted]	11/29/2021 2:06 PM	11/29/2021 2:06 PM	Success	Details

DISABLING EASECONNECT 834

If the client has changed insurance carriers, or the [carrier] (834) has migrated to EaseConnect or EaseConnect+, disable EaseConnect 834 for [carrier] (834).

Steps to disable a client on EaseConnect 834:

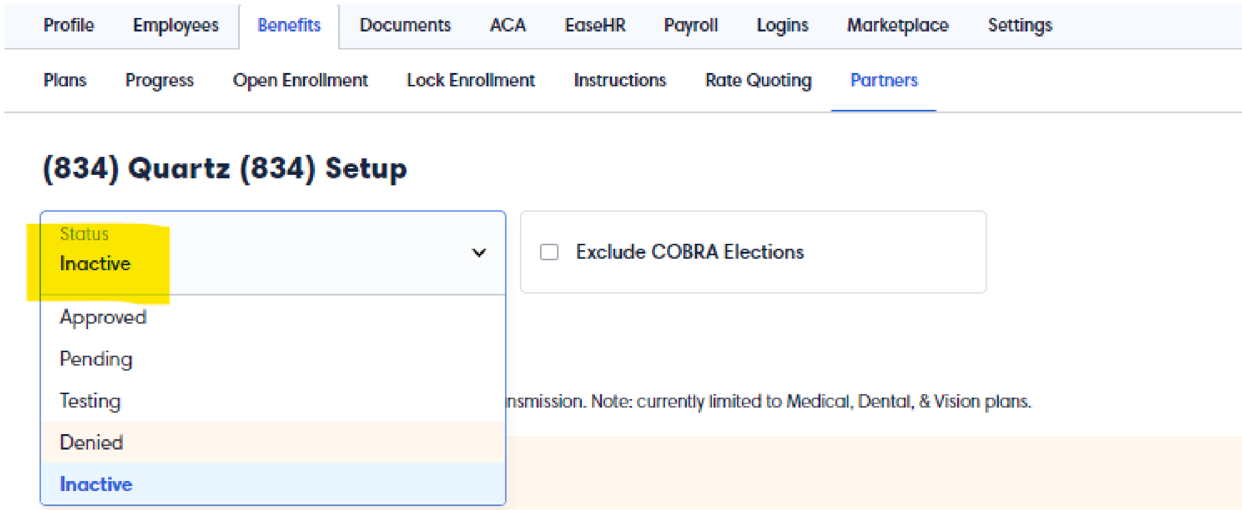
1. Go to **Client** > **Profile > Overview > Connected Partners.**
2. Click **Manage** next to **(834) [carrier] (834)**.

Connected Partners

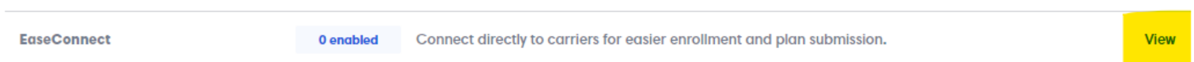
Status & information on partners connected in the marketplace

Name	Status	Status Detail	
(834) Quartz (834)	Pending (8/9/2021 - 0 days ago) John Adams		Manage

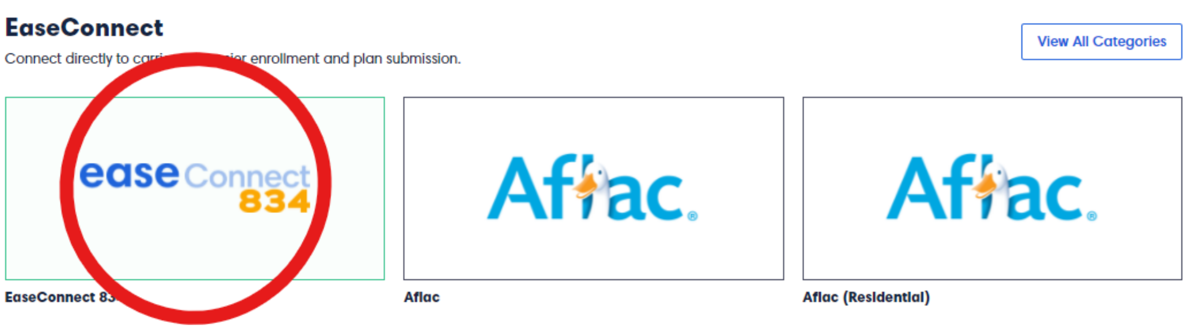
3. Update **Status** to **Inactive**.



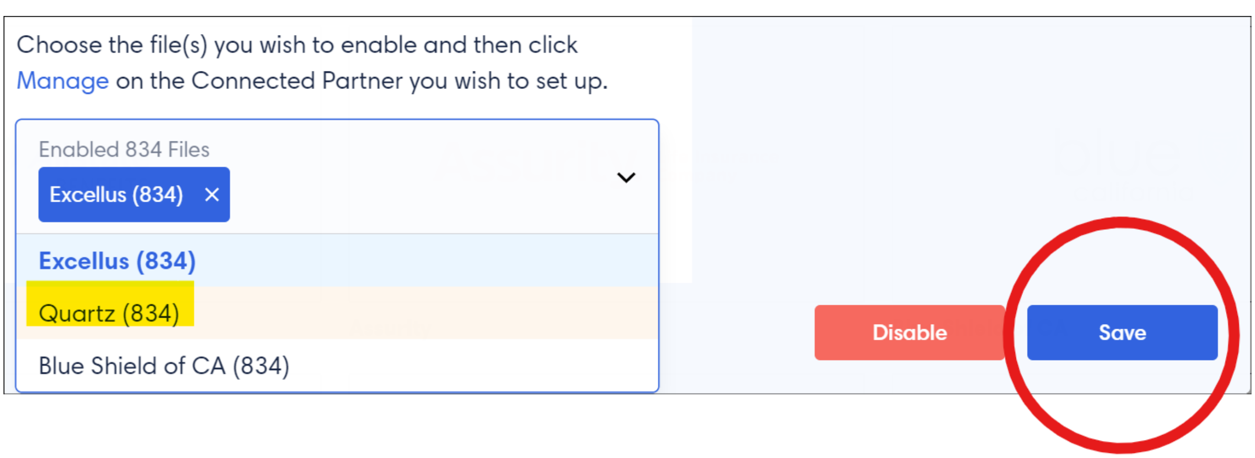
4. Go to **Marketplace.**
5. Click **View** next to **EaseConnect**.



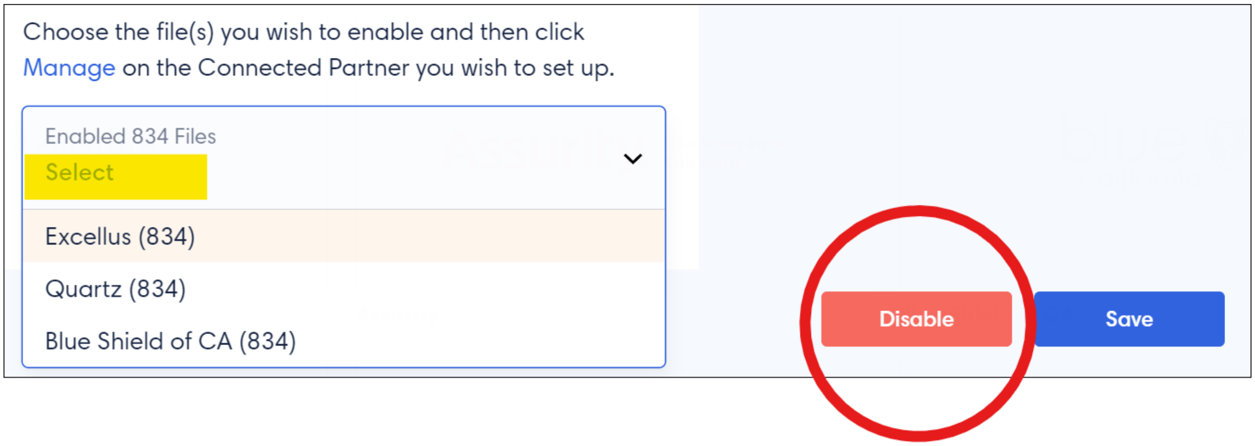
6. Go to **EaseConnect 834**.



7. To only remove one **[carrier] (834),** click the X for **[carrier] (834)** that is no longer in production for client, from the **Enabled 834 Files** list and click **Save.**



8. To remove all, click X for all **[carrier] (834)s** in the drop list and click **Disable**.



FAQ's

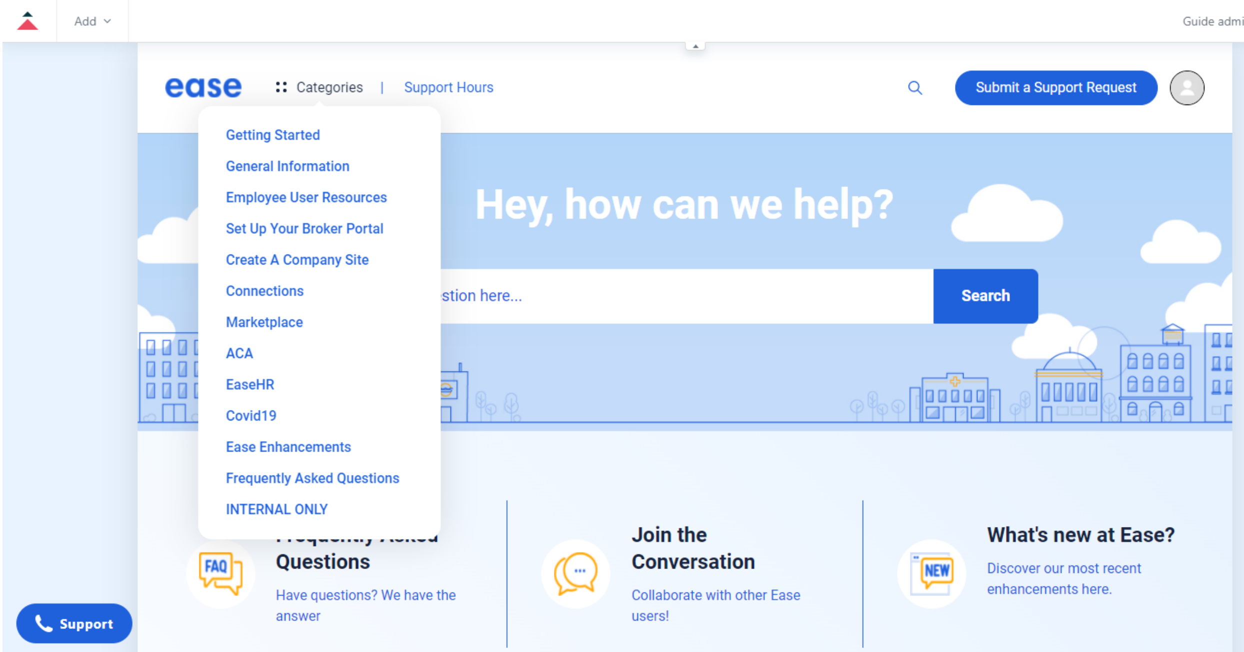
[EaseConnect 834 FAQ]

TROUBLESHOOTING

Build Out the Plans in Ease

If you are new to Ease, you can follow the basic build instructions in the [Broker Quickstart Guide].

For a deeper dive into a particular topic, choose from the Categories list in the Help Center (must be logged in to Ease as a broker to access).



In addition to the traditional build steps, there are a few key things to which to pay close attention to adhere to the carrier's requirements as well as to ensure proper mapping for the connection.

Note: If the case is not set up accurately, you may experience delays due to discrepancies in the data provided to the carrier.

HELP

Carrier

Work with your Carrier Representative for client approval and to collect account structure and transmission data needed for EDI submission.

Ease

Email: easeconnect834@ease.com