

ease Connect 834

BROKER GUIDE

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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

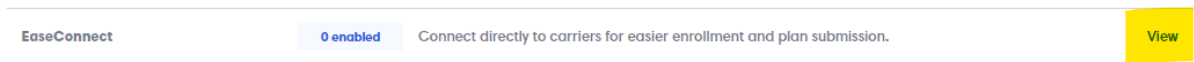
Click here for an [updated list](#) of carriers that are published with EaseConnect 834.

GETTING STARTED

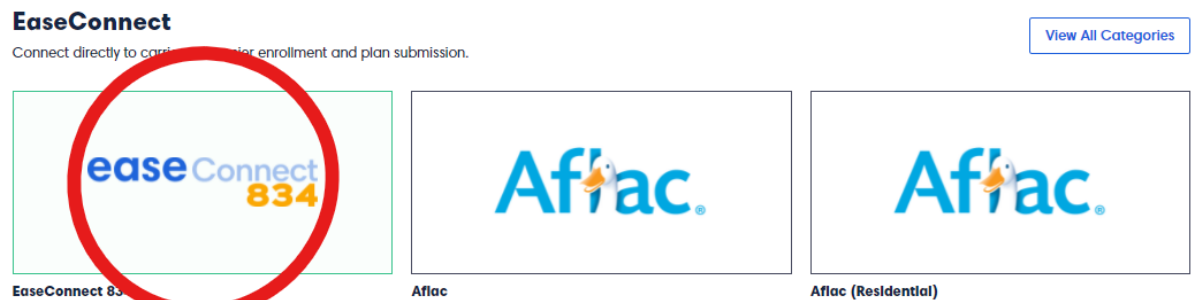
After a new carrier is mapped successfully, the broker can enable EaseConnect 834 on a per client basis in the Marketplace.

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**.

Discover products to save time, expand your offerings, and generate more revenue

Close

EaseConnect 834
\$0.45 / mo

Please visit the [support page](#) for assistance with Enabling EaseConnect 834 for a company.

Broker handbook, video

Billing Account
[Redacted]

Cost
\$0.45

Cost Override
No Override

Minimum Cost
No Minimum

Choose the file(s) you wish to enable and then click [Manage](#) on the Connected Partner you wish to set up.

Enabled 834 Files

Blue Shield of CA (834) x

Excellus (834)

Quartz (834)

Blue Shield of CA (834)

Disable Save

5. Go to **Client > Profile > Overview > Connected Partners**.
6. 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

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

Status
Pending

Approved

Pending

Testing

Denied

Inactive

☐ Exclude COBRA Elections

nsmission. Note: currently limited to Medical, Dental, & Vision plans.

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

Connected Plans
Check all applicable plans to be included in the 834 file transmission. Note: currently limited to Medical, Dental, & Vision plans.

<input type="checkbox"/> Name	Type	Policy Number	Effective
<input checked="" type="checkbox"/> HMO 2021	Medical	12334455	1/1/2021

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

Partner Codes
Map the carrier code(s) to the corresponding category utilizing the carrier's group account structure. If a category is missing, contact Ease to have it added to your EaseConnect 834. See [guide](#) for more information.

View Organization
Add Partner Code

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

Add Partner Code
Close

Category *
Select

Search

Group Number
Subgroup
Class
Department
Package Number

Pay Cycles
Select

Statuses

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

Scheduled Reports

Securely and automatically schedule data feeds using carrier-approved instructions.

No Scheduled Reports found

Actions

Add Report
Run Custom

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)

Scheduled Reports

Company

Fruit Broker, Inc.



Add Scheduled Report

No scheduled reports have been found.

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

The screenshot shows a report card for a partner. The card has a header with a partner name (redacted) and an 'Actions' dropdown menu. Below the header, there are fields for 'Partner' (redacted), 'System Id' (134ffe51-27d1-485f-896c-d18789a6613d), 'Type' (redacted), 'Schedule' (At 12:00 AM - Eastern Standard Time), 'Next Run' (8/25/2021 12:00 AM), 'Last Run Status' (redacted), 'Last Run Date' (redacted), 'Current Run Status' (Waiting), and 'Waiting'. The 'Actions' dropdown menu is open, showing 'Run' and 'Reset' options.

- 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**.

Connected Partners

Status & information on partners connected in the marketplace

Name	Status	Status Detail
(834) Anthem CA LRG GRP	<div><div></div>Testing (12/22/2021 - 6 days ago) John Adams</div>	Activity , Manage

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

(834) Anthem CA LRG GRP Setup

Status

Testing

Approved

Pending

Testing

Denied

Inactive

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**.

Scheduled Reports

Securely and automatically schedule data feeds using carrier-approved instructions.

Name	Type	Schedule	Last Run	Next Run	
Carrier 1 Test File	Testing	At 05:00 AM, only on Wednesday - Pacific Standard Time	 11/29/2021 2:06 PM	Disabled	<div><div>Actions</div><div>Add Report</div><div>Run Custom</div><div>View</div></div>

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)

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

Run

Run Custom

Close

Scheduled Report *

Carrier 1 Test File

File Name

OE_2022 {Client Name} {DDmmYYhhss}.txt

Grammar Correction
Open with the left-click (Alt+Down Arrow)

<input type="checkbox"/> Name	Type
<input checked="" type="checkbox"/> 100 / 80 50 \$1,500 <div>OE</div>	Dental 465465 1/1/2022
<input type="checkbox"/> 100 / 80 50 \$1,500	Dental 465465 1/1/2021
<input type="checkbox"/> HMO 2021	Medical 12334455 1/1/2021
<input checked="" type="checkbox"/> HMO 2022 <div>OE</div>	Medical 12334455 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**.

Scheduled Reports

Securely and automatically schedule data feeds using carrier-approved instructions.

Actions

Name	Type	Schedule	Last Run	Next Run	
Carrier 1 Test File	Testing	At 05:00 AM, only on Wednesday - Pacific Standard Time	11/29/2021 2:06 PM	Disabled	View

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**.

(834) Quartz (834) Setup

Status ▼

- Inactive
- Approved
- Pending
- Testing
- Denied
- Inactive

☐ Exclude COBRA Elections

transmission. Note: currently limited to Medical, Dental, & Vision plans.

- Go to **Marketplace**.
- Click **View** next to **EaseConnect**.




EaseConnect
0 enabled
 Connect directly to carriers for easier enrollment and plan submission.
 View

- Go to **EaseConnect 834**.

EaseConnect

Connect directly to carriers for easier enrollment and plan submission.

[View All Categories](#)

EaseConnect 834
 Aflac
 Aflac (Residential)

- 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**.

Choose the file(s) you wish to enable and then click [Manage](#) on the Connected Partner you wish to set up.

Enabled 834 Files ▼

- Excellus (834) ×
- Excellus (834)
- Quartz (834)
- Blue Shield of CA (834)

Disable
Save

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

Choose the file(s) you wish to enable and then click [Manage](#) on the Connected Partner you wish to set up.

Enabled 834 Files

Select

Excellus (834)

Quartz (834)

Blue Shield of CA (834)

Disable

Save

FAQ's

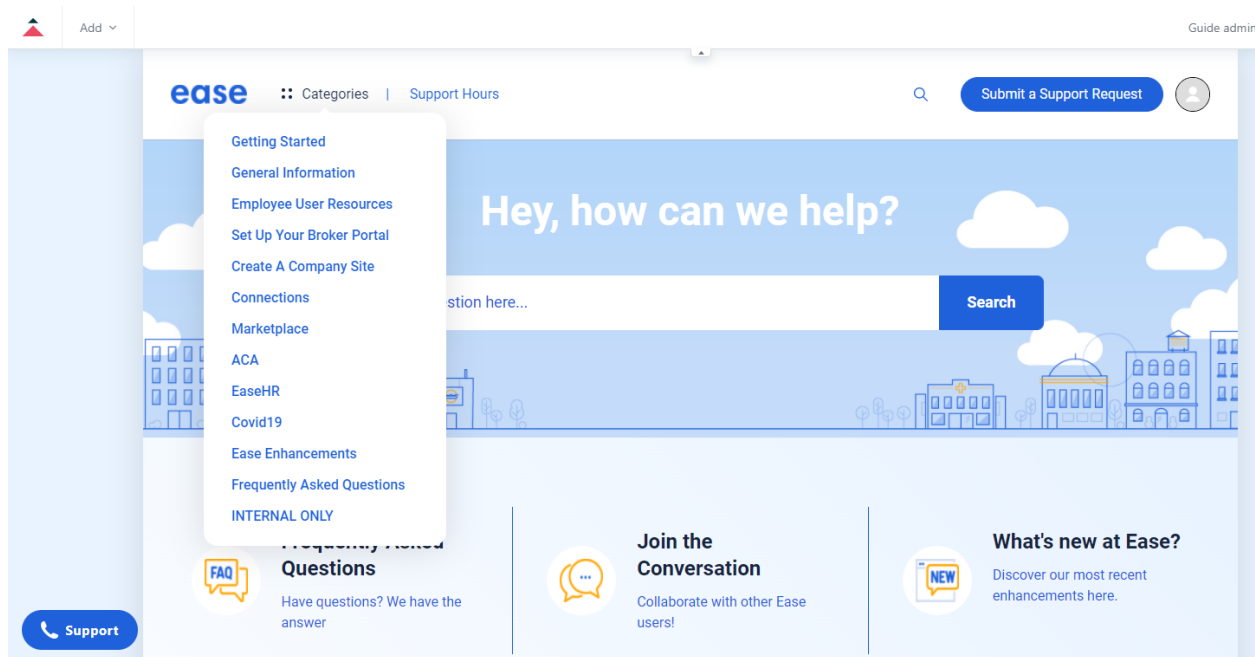
[EaseConnect 834 FAQ](#)

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