Plan-Smart Client Administrator Portal

July 2017

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Plan-Smart Client Administrator Portal

https://www.yourdependentverification.com/plansmart
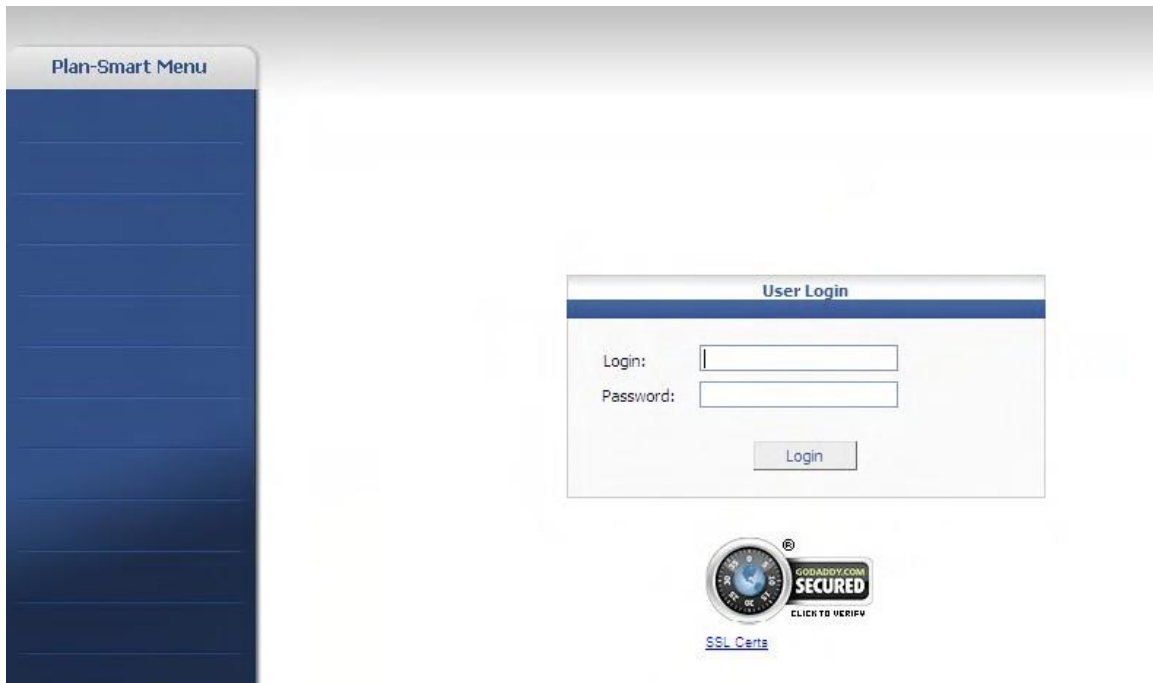
The client user login information will be provided by your Aon Hewitt Client Account Manager upon completion of the demonstration webinar.

Select Company

You may enter the client site by selecting 'Select Company' in the left hand menu bar. If you have access to multiple client shells, you will need to indicate the name of the company you wish to enter.

Select Period

Once you have selected the company, you will need to select 'Select Period' in the left hand menu bar. We have the ability to manage several "layers" of a project by separating certain groups of employees subject to audit into periods. This is most commonly due to multiple plans subject to audit, with different eligibility criteria. It may also be for segregated reporting purposes determined during implementation.
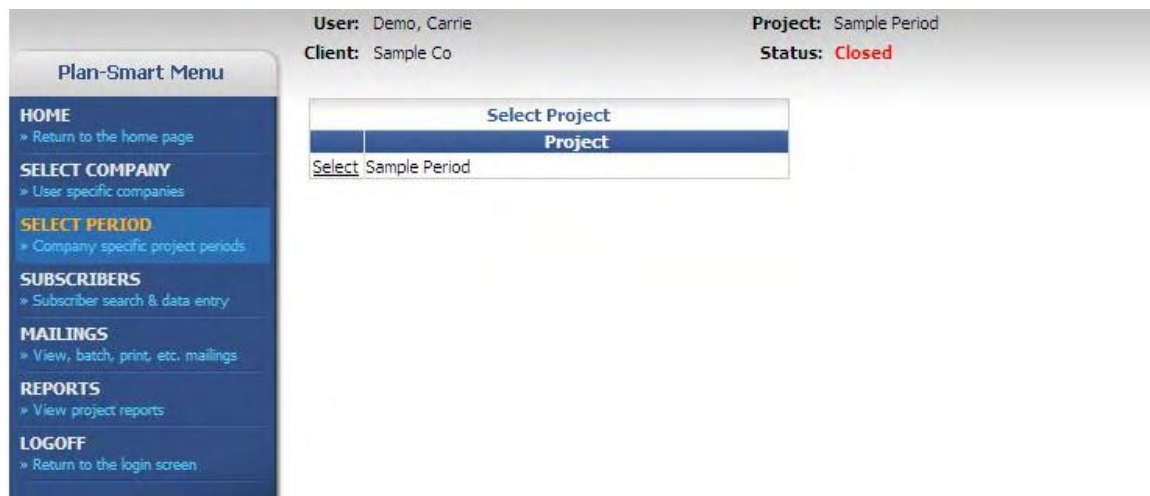
Note: The client's user's access may be defined by Company, Period, or Division level to limit accessibility to information. We may also define certain roles to the client user to limit the system functionality access, such as "read-only".

Home

Once the period is selected, you will default to the 'Home Page'. This landing page provides a wealth of project data and will act as a project dashboard for the client user.

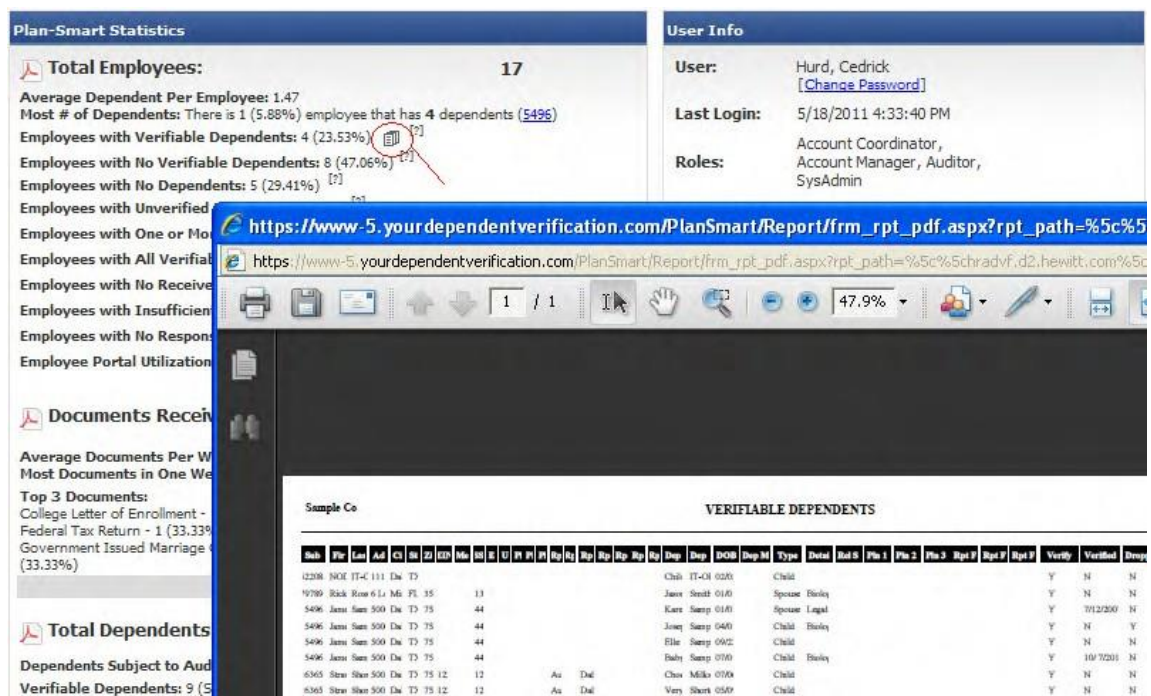'Plan-Smart Statistics' reflect the statistics of a comprehensive audit.

The dashboard reflects granular statistics of the audit project.

Note: *You must have the ability to open PDF documents in order to access any of the reports in Plan-Smart. Additionally, you must disable pop-up blockers for this site.*

In most instances, the symbol to the left of a statistic represents a statistical report.
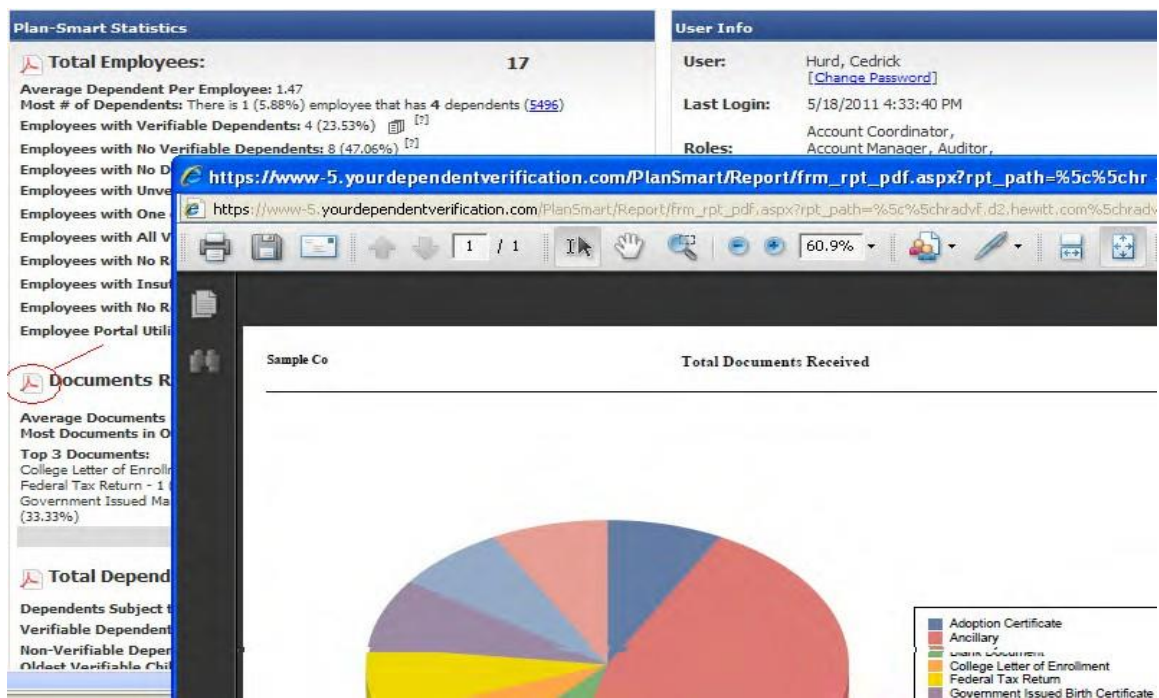
In most instances, the symbol to the right of a statistic represents a detailed list report.

The question mark icon to the right of the statistic defines the reporting logic.

There are several links throughout the page of Aon Hewitt Account Numbers. Clicking on any one of these links will take you directly to the subscriber's record.

'Plan-Guard Statistics' reflect the statistics of the on-going verification process, Plan-Guard.
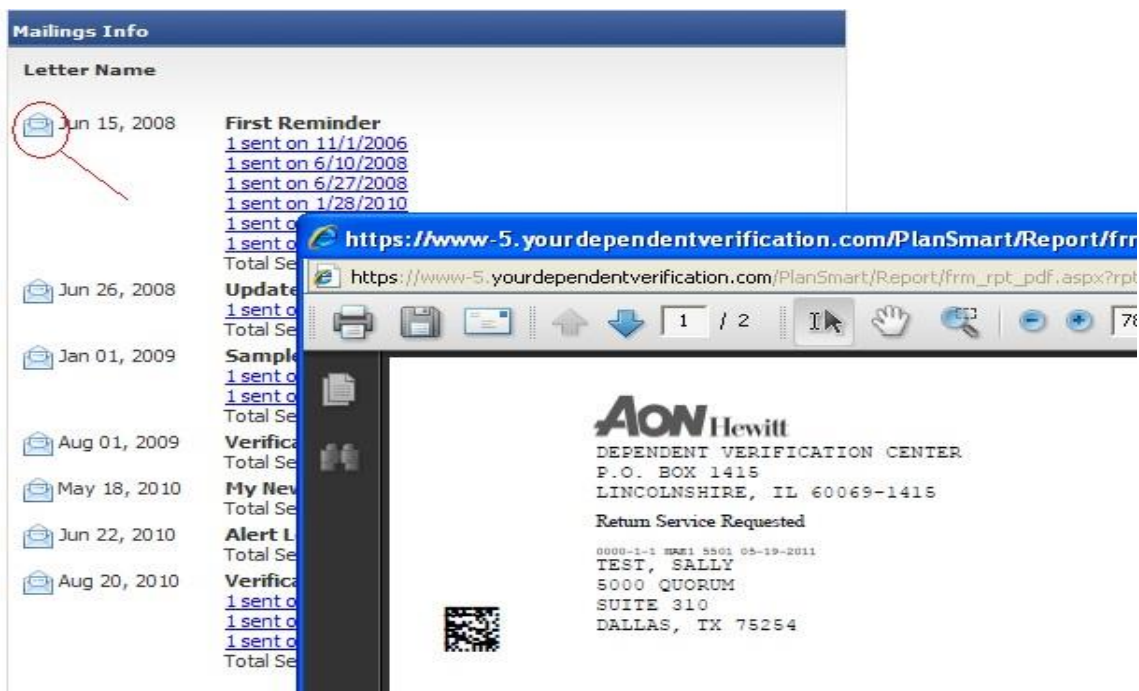
You may view scheduled calendar based mailing information under 'Mailings Info'.

The envelope icon to the left of the letter date and name will allow you to view the current version of the letter.

The links under the letter name will show you the letter status and allow you to view the detailed mailing list by day and letter type.

You can view user information and access levels under 'User Info'. You have access to change your password, view last login, and view access roles.

You can view general information for the project under 'Company Info'. This section allows you to view general company information, as well as the project dates for the comprehensive audit, the days left for the project, the cost per dependent per month used to calculate project savings, close date (if the project is complete), period specific dates, eligibility criteria, employee scripting, and period alerts, Client Account Manager name, and the Sales Executive name.

You are able to view client specific details by mousing over the 'Client Info/Alerts' icons.

The 'Calendar' will reflect scheduled mailing activity. Scroll over the date to view the scheduled mailing information and targeted recipients.

File transfer activity is tracked in 'File Transfer Status'. Similar to the mailing 'Calendar', you can view scheduled file transfer activity by defining your date parameters.

You may review more detailed process information by selecting 'View Report'.

Subscribers

You may view employee and dependent detail information under the 'Subscribers' link in the left hand menu bar.

You can search for either subscriber or dependent records by a number of search options.

Note: *The assigned Subscriber ID Number is the 'Account #' field. Additionally, the information and search options will be determined by the information received in the initial data feed, such as your company's 'EIN'.*

Once you find the record you want to search, click 'Select' next to the employee's name.

All icons within the employee record show detailed information specific to the family and the plan in which the family is enrolled.

Mousing over the house in the 'Verify Status' block will allow you to view the employee's dependent information: The dependent name; the dependent type; the dependent date of birth (DOB); the dependent age; the dependent 'Verified' status, the dependent 'Dropped' status (a dependent is considered 'Dropped' when they are opted out of or removed from the plan); the dependent 'Failed' status (the dependent will show as failed if they are unable to verify during the dependent audit); and the dependent's 'Gatekeep' (Plan-Guard only – this is the dependent's audit window when in Plan-Guard).

Note: The 'Verify Status' percentage represents action required to be taken, if any. It does not indicate family verification status.

To view the full record information, you will navigate by using the top available menu options.

The 'Demographics' tab houses the employee's address and contact information. Depending on the user access, you may be limited to making changes. You can view the employee's subscriber portal login information by clicking on 'Portal Access'.

The 'Audit' tab houses all inbound documents, document data elements, and verification attempts.

The employee screen in the upper left hand corner of the page houses family specific information available in a series of mouse-overs.

The 'House' icon represents the family and their verification status.

The 'Envelope' icon represents scheduled outbound mailings and mail status.
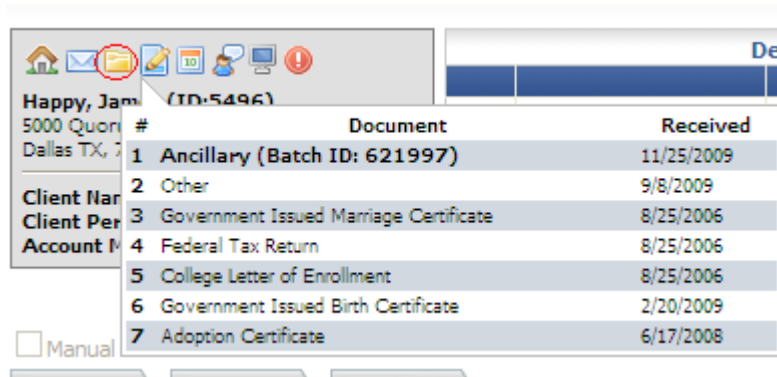
The 'Folder' icon represents received inbound documents.

The 'Pencil/Paper' icon represents specific eligibility criteria based on the plan in which the family is enrolled.

The 'Calendar' icon represents date specific project information.
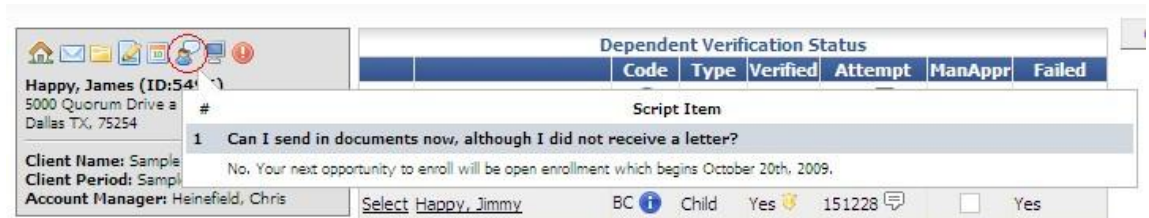

The 'Person' icon represents client specific scripting utilized by our Customer Care Representatives.

The 'Computer' icon represents the employee's login to the subscriber portal.

The 'Urgent' represents any critical information needing to be dispersed to all areas of operations instantaneously.

The 'Issues' tab houses all employee/dependent specific notes, resulting from employee interaction with customer service, the auditor's results after reviewing documents submitted by the employee, file transfer activity, and/or other general system notes.

The 'Issue Information' will reflect the user or group that created the issue, the source category, the reason category, result category, issue status (open, closed, or follow-up), and issue text as applicable.

The 'Verification Requirements' will list plan eligibility criteria and documents required for verification by dependent detail type specific to the plan in which the family is enrolled.

Code	Type	Info
AC	Adopted Child	ⓘ
AS	Adopted Child Student	ⓘ
BC	Biological Child	ⓘ
BS	Biological Student	ⓘ
CC	Certified Child	ⓘ
CLS	Common Law Spouse	ⓘ
DAC	Disabled Adopted Child	ⓘ
DBC	Disabled Biological Child	ⓘ
DG	Disabled Grandchild	ⓘ
FC	Foster Child	ⓘ
GC	Grandchild	ⓘ
LS	Legal Spouse	ⓘ
LW	Legal Ward	ⓘ

Biological Child

- Must be unmarried
- Tax Return required if child not born in **CURRENT CALENDAR**

Verificaton Sets Accepted (All)

Accepted Sets	Alternate Docs
Government Issued Birth Certificate and Federal Tax Return Within Last 2 Years	
Government Issued Birth Certificate Only	DNA Parentage Test, Divorce Decree

Verificaton Rules

Will not accept voluntary paternity docs

The 'Mailings' tab allows you to view outbound mailings and their mail status.

You can also view a PDF version of the letter mailed to the employee by clicking on the 'View' link next to the letter you wish to see.

The 'Resources' tab houses a search engine of County, State, and Consulate contact information to obtain vital records.

Mailings

The 'Mailings' link in the left hand menu bar allows you to view batched mailings by letter type, name, status, or creator. Additionally, you can view the image of each mailing by employee and view the employee mail status.

Reports

The 'Reports' link in the left hand menu bar allows you to access an expansive menu of on-demand reporting and export to a number of different formats.

The 'Info' link to the left of each report name defines the reporting logic.
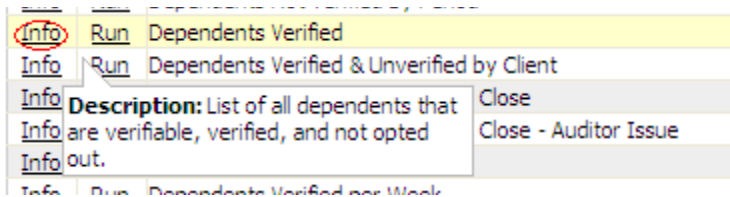
Once you determine which report you want to access, click the 'Run' button.
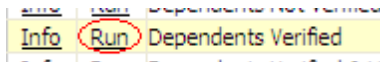
You will need to specify your parameters as applicable. To run in any format other than PDF, select HTML.

Once you retrieve your report, the HTML version will appear.

When you scroll over the icon in the upper left corner, you will see the option to 'Export'. Once you click on the icon, you will need to specify the requested format.
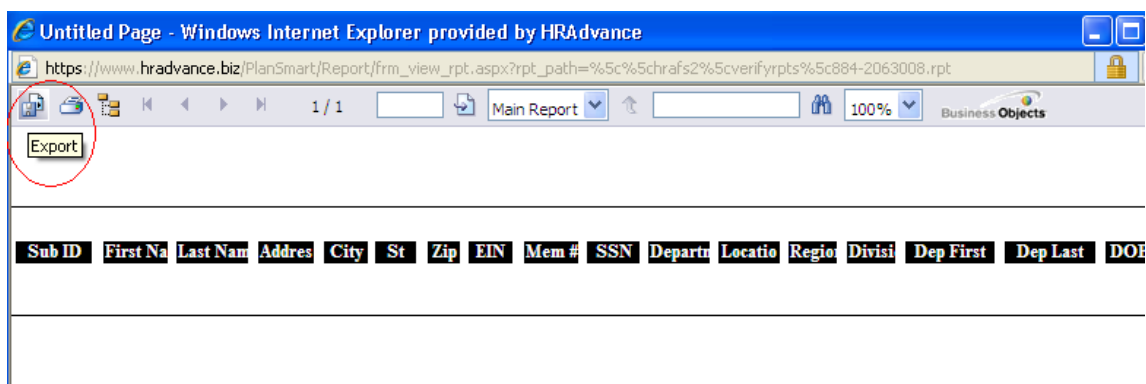
Open your report in the specified format.

If you need to manipulate the file, 'MS Excel 97-2000 (Data Only)' is your best option.

Please Note

The Plan-Smart system will automatically log you out if your session is idle in excess of 10 minutes. You can also log out of your session, by clicking on the 'Log Out' link in the left hand menu bar.

If you need any information in regard to information accessibility, please do not hesitate to contact your Aon Hewitt Client Account Manager.

Common DVS Acronyms

Acronym	Definition
AC	adopted child
BC	biological child
BRE	business return envelope
CCI	customer called in
CLS	common law spouse
DCE	dependent covering employee
DEA	dependent eligibility audit
DEP	dependent
DP	domestic partner
EE	employee
FTR	federal tax return
GIBC	Government issued birth certificate
GIMC	Government issued marriage certificate
LS	legal spouse
POJ	proof of joint ownership
POM	proof of marriage
SUB	subscriber
TR	tax return
VER DEMOS	verified demographic information
VRL	verification request notice

About Alight Solutions

As the leading provider of benefits administration and cloud-based HR and financial solutions, we enhance work and life through our service, technology and data. Our 22,000 colleagues across 14 global centers deliver an unrivaled consumer experience for our clients and their people. **We are Alight. Reimagining how people and organizations thrive.**

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