

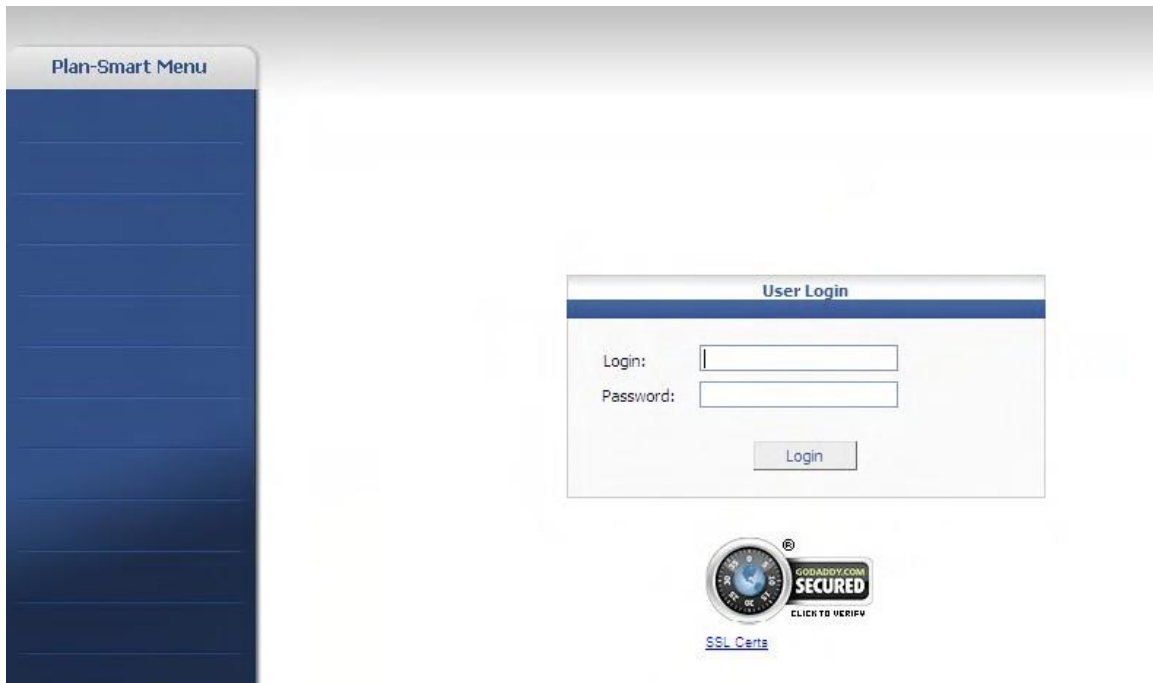
# **Plan-Smart Client Administrator Portal**

July 2017

**alight**

# 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.

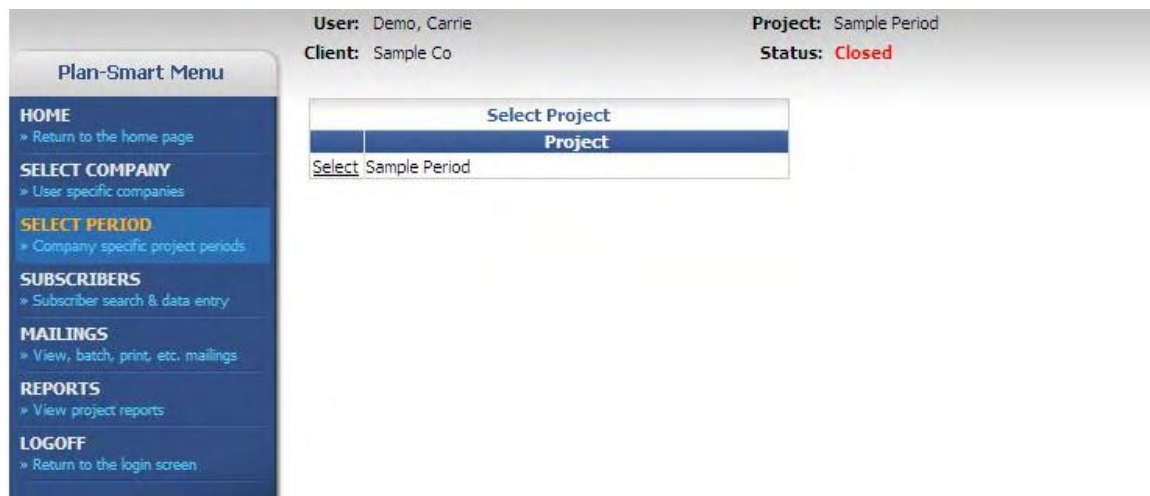
## Select Company

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 screenshot displays the 'Plan-Smart Home Page' dashboard, which is divided into several sections. The main section on the left, titled 'Plan-Smart Statistics', contains three sub-sections: 'Total Employees: 14', 'Documents Received: 3', and 'Total Dependents: 19'. Each sub-section provides detailed statistics and links to further information. The 'Total Employees' section lists various employee categories and their counts, such as 'Average Dependent Per Employee: 1.35' and 'Most # of Dependents: There are 2 (14.29%) employees that have 3 dependents (5493, 5499)'. The 'Documents Received' section shows 'Average Documents Per Week: .05' and 'Most Documents in One Week: Week of 8/21/2006 had 3 documents received'. The 'Total Dependents' section lists 'Top 3 Documents' and 'Bottom 3 Documents'. The right side of the dashboard features a 'User Info' section with details about the current user, 'Demo, Carrie', including their last login and roles. Below this is a 'Company Info' section with details about 'Sample Co', including its address, project information, and contact details. At the bottom right is a 'Calendar' section.

Plan-Smart Statistics	
<b>Total Employees:</b>	<b>14</b>
Average Dependent Per Employee: 1.35	
Most # of Dependents: There are 2 (14.29%) employees that have 3 dependents (5493, 5499)	
Employees with Verifiable Dependents: 0	[?]
Employees with No Verifiable Dependents: 0	[?]
Employees with No Dependents: 4 (28.57%)	[?]
Employees with Unverified Dependents: 1	[?]
Employees with One or More Verified Dependents: 1	[?]
Employees with All Verifiable Dependents Verified: 1	[?]
Employees with No Received or Pending Documents: 1	[?]
Employees with Insufficient Docs (No Dependents Verified): 0	[?]
Employees with No Response: 0	[?]
Employee Portal Utilization: n/a	[?]
<b>Documents Received:</b>	<b>3</b>
Average Documents Per Week: .05 [?]	
Most Documents in One Week: Week of 8/21/2006 had 3 documents received	
<b>Top 3 Documents:</b>	<b>Bottom 3 Documents:</b>
College Letter of Enrollment - 1 (33.33%)	State Issued Marriage Certificate - 1 (33.33%)
Federal Tax Return - 1 (33.33%)	Federal Tax Return - 1 (33.33%)
State Issued Marriage Certificate - 1 (33.33%)	College Letter of Enrollment - 1 (33.33%)
<b>Verification Statistics</b>	
<b>Total Dependents:</b>	<b>19</b>

User Info	
<b>User:</b>	Demo, Carrie <a href="#">[Change Password]</a>
<b>Last Login:</b>	1/27/2010 10:11:45 AM
<b>Roles:</b>	Client 1 (basic), Client 2 (advanced), Reporting

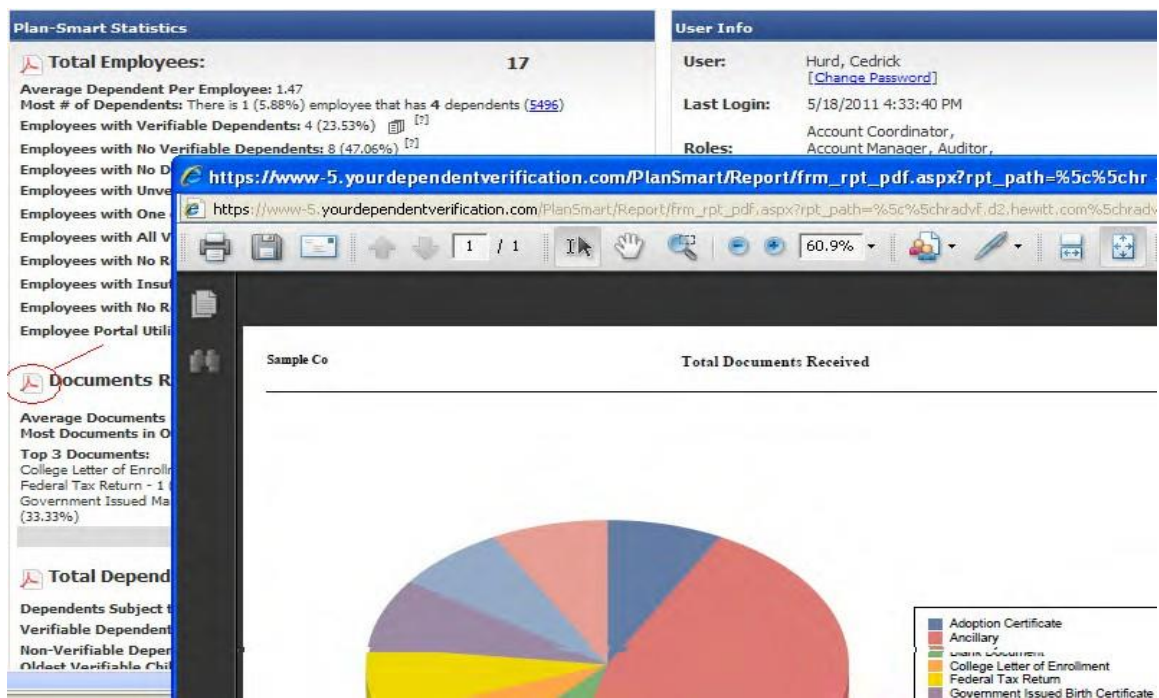
Company Info	
<b>Company:</b>	Sample Co
<b>Address:</b>	123 Main Street Dallas 75555 TX
<b>Project:</b>	Sample Period (7/1/2006-12/1/2006)
<b>Days Left:</b>	Project has completed
<b>Cost Per Dependent:</b>	\$245.00
<b>Project Close Date:</b>	7/1/2007
<b>Client Info / Alerts (Sample Period)</b>	
<b>Account Manager:</b>	Heinefield, Chris
<b>Sales Representative:</b>	Poganick, Bill

Calendar
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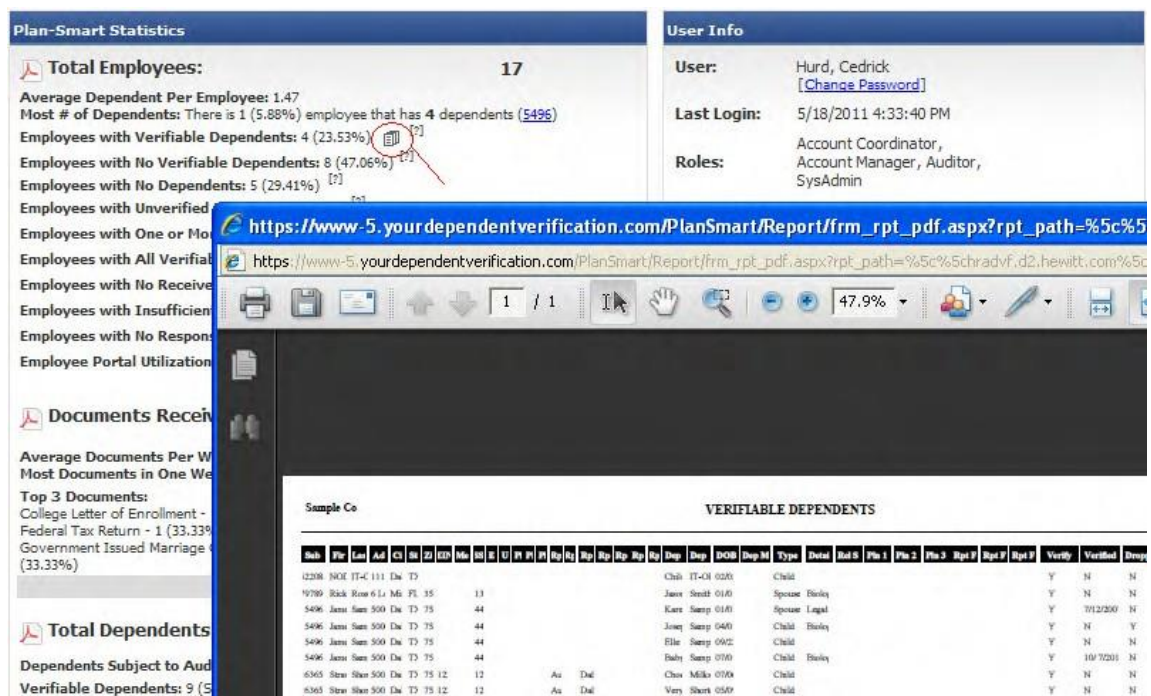
The dashboard reflects granular statistics of the audit project.

**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.

Plan-Smart Statistics		User Info
<b>Total Employees:</b> 14 Average Dependent Per Employee: 1.35 Most # of Dependents: There are 2 (14.29%) employees that have 3 dependents ( <a href="#">5493</a> , <a href="#">5499</a> ) Employees with Verifiable Dependents: 0 [?] Employees with No Verifiable Dependents: 0 [?] Employees with No Dependents: 4 (28.57%) [?] Employees with Unverified Dependents: 1 [?] Employees with One or More Verified Dependents: 1 [?] Employees with All Verifiable Dependents Verified: 1 [?] Employees with No Received or Pending Documents: 1 [?] Employees with Insufficient Docs (No Dependents Verified): 0 [?] Employees with No Response: 0 [?] Employee Portal Utilization: n/a [?]	<b>Employees with One or More Verified Dependents:</b> Number of employees with at least ONE dependent verified. This number includes dependents that are VERIFIABLE and NON-VERIFIABLE. Dependents marked as OPTED-OUT are NOT included.	<b>User:</b> Demo, Carrie <a href="#">[Change Password]</a> <b>Last Login:</b> 1/27/2010 10:11:45 AM <b>Roles:</b> Client 1 (basic), Client 2 (advanced), Reporting
<b>Documents Received:</b> 3 Average Documents Per Week: .05 [?] Most Documents in One Week: Week of 8/21/2006 had 3 documents received Top 3 Documents: [?] Bottom 3 Documents: [?]		<b>Company Info</b> Company Name: [?] Address: [?] City: [?] State: [?] Zip: [?] Phone: [?] Fax: [?] Email: [?] Sample Period (7/1/2006-12/1/2006): [?] <b>Days Left:</b> Project has completed <b>Cost Per Dependent:</b> \$245.00 <b>Project Close Date:</b> 7/1/2007 <b>Client Info / Alerts (Sample Period)</b> [?] [?] [?]

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.






Average Dependent Per Employee: 1.35  
 Most # of Dependents: There are 2 (14.29%) employees that have 3 dependents ([5493](#), [5499](#))  
 Employees with Verifiable Dependents: 0 [?]  
 Employees with No Verifiable Dependents: 0 [?]  
 Employees with No Dependents: 4 (28.57%) [?]

'Plan-Guard Statistics' reflect the statistics of the on-going verification process, Plan-Guard.

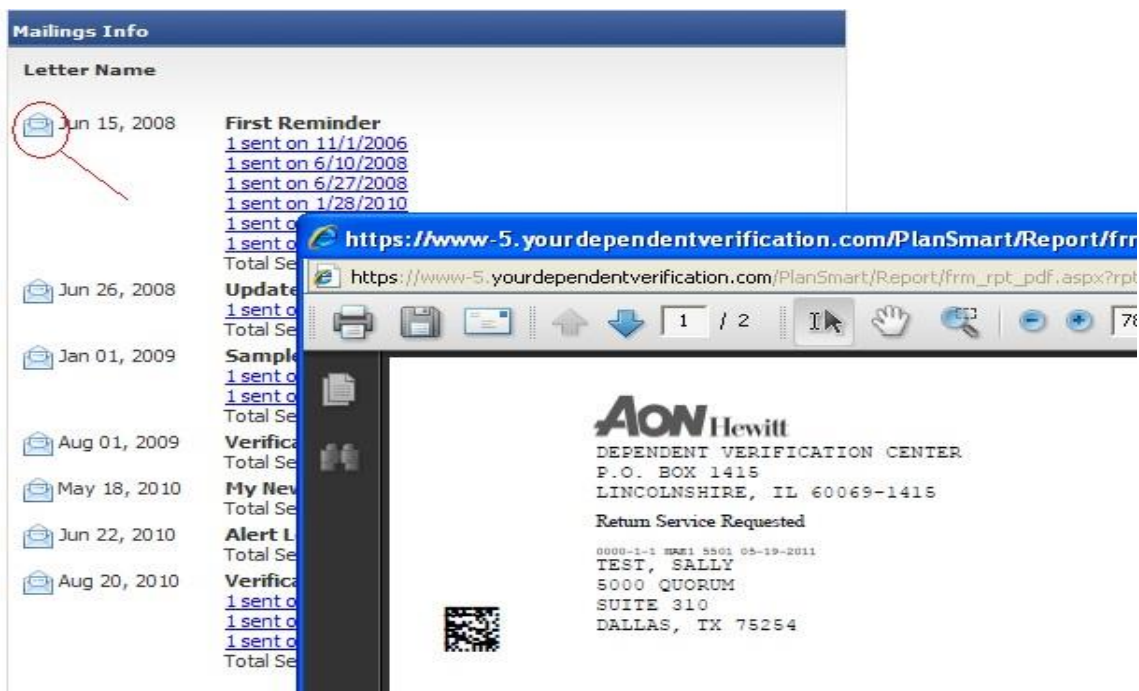
Plan-Guard Statistics	
<b>Total Verifiable Dependents</b> Verifiable Dependents in Plan-Guard Only: 0 Verifiable Dependents in Plan-Smart Only: 0 Verifiable Dependents in Plan-Smart now in Plan-Guard: 0	<b>0</b>
<b>Dependents Currently in Plan-Guard</b> Employees with Dependents Currently in Plan-Guard: 0	<b>0</b>
<b>Plan-Guard Dependents Verified</b> Total Plan-Guard Dependents to Date: 2 Failed to Verify: 1 [?] Verifiable Employee Opt Out: 0 [?] Non-Verifiable Employer Opt Out: 0 [?] Average Verified Per Week*: 0 [?] Total Annual Savings: \$2,940.00	<b>1 (50.00%)</b>



You may view scheduled calendar based mailing information under 'Mailings Info'.





Mailings Info	
Letter Name	
 Jun 15, 2008	<b>First Reminder</b> <a href="#">1 sent on 11/1/2006</a> <a href="#">1 sent on 6/10/2008</a> <a href="#">1 sent on 6/27/2008</a> <a href="#">1 sent on 1/28/2010</a> <a href="#">1 sent on 3/14/2011</a> <a href="#">1 sent on 3/15/2011</a> Total Sent: 6
 Jun 26, 2008	<b>Updated 7/3 - Verification Request Letter</b> <a href="#">1 sent on 12/4/2009</a> Total Sent: 1
 Jan 01, 2009	<b>Sample Letter</b> <a href="#">1 sent on 10/26/2010</a> <a href="#">1 sent on 11/23/2010</a> Total Sent: 2
 Aug 01, 2009	<b>Verification Request Letter</b> Total Sent: 0
 May 18, 2010	<b>My New Letter</b> Total Sent: 0

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



The screenshot shows the 'Mailings Info' section of an application. It lists several letters with their dates and names. The first letter, 'First Reminder' dated Jun 15, 2008, is highlighted with a red circle around its envelope icon. A magnifying glass is shown over the icon. Below the list, a preview of the letter is displayed, showing the Aon Hewitt logo, address (P.O. BOX 1415, LINCOLNSHIRE, IL 60069-1415), and return service information. The preview also includes a QR code and a list of recipients (TEST, SALLY) with their addresses (5000 QUORUM SUITE 310, DALLAS, TX 75254).

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.

Mailings Info	
Letter Name	
 Nov 01, 2006	<b>Verification Request</b> <a href="#">1 sent on 11/1/2006</a> <a href="#">1 sent on 6/10/2008</a> Total Sent: 2
 Jun 15, 2008	<b>First Reminder</b> <a href="#">1 sent on 11/1/2006</a> <a href="#">1 sent on 6/10/2008</a> <a href="#">1 sent on 6/27/2008</a> Total Sent: 3
 Jun 26, 2008	<b>Updated 7/3 - Verification Request Letter</b> <a href="#">1 sent on 12/4/2009</a> Total Sent: 1
 Aug 01, 2009	<b>Verification Request Letter</b> Total Sent: 0

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.

User Info	
<b>User:</b>	Demo, Carrie [ <a href="#">Change Password</a> ]
<b>Last Login:</b>	1/27/2010 10:11:45 AM
<b>Roles:</b>	Client 1 (basic), Client 2 (advanced), Reporting

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.

Company Info	
<b>Company:</b>	Sample Co
<b>Address:</b>	123 Main Street Dallas 75555 TX
<b>Project:</b>	Sample Period (7/1/2006-12/1/2008)
<b>Days Left:</b>	Project has completed
<b>Cost Per Dependent:</b>	\$245.00
<b>Project Close Date:</b>	7/1/2007
<b>Client Info / Alerts (Sample Period)</b>	   
<b>Account Manager:</b>	Heinefield, Chris
<b>Sales Representative:</b>	Poganick, Bill



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

# Script Item

1 Can I send in documents now, although I did not receive a letter?

No. Your next opportunity to enroll will be open enrollment which begins October 20th, 2009.

2 OPT-OUT PROCESSING SCRIPT

I will send you a Dependent Opt-Out Form to be completed and returned back to HRAdvance. The dependent(s) will be subject to the verification process until HRAdvance has received the form and written notification from the Plan Sponsor confirming the Plan coverage has

Company Info

**Company:** Sample Co


**Address:** 123 Main Street  
Dallas 75555 TX

**Project:** Sample Period (7/1/2006-6/30/2011)

**Days Left:** 42 days  
Week **254** of **260** week project

**Cost Per Dependent:** \$245.00

**Project Close Date:** 7/1/2007

**Client Info / Alerts (Sample Period)** 

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

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%)

**Calendar**

July 2009						
<						>
Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1

**Mailings for 8/1/2009**

**Letter Name:** Verification Request Letter

**Type:** Send to Subs with Verifiable Dependents that are Non-Verified

**Verification List?:** Yes

**Dependent List?:** No

**Dependent Coupon?:** Yes

**Number Sent:** 0

**Calendar**

>
Sat
2

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.

**File Transfer Status for Wednesday, 1/27/2010**

Calendar for October 2009:

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

From: 10/1/2009 To: 10/1/2009 Filter Due Issues

[View Report](#)

**File Transfer Issues Due from 10/1/2009-10/1/2009**

**File Transfer Issues Scheduled for 10/1/2009**

**File Transfer Issues Manually Created on 10/1/2009**

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

NUMBER OF ISSUES OPEN: 0 (0.00%)

Number of Issues Requiring Followup: 0 (0.00%)

Most Issue in One Week: Week of 8/21/2006 had 42 issues

Oldest Open Audit Issue: No open audit issues

Oldest Open Issues: No open issues

**Total Issue Details:** 350

From: 10/1/2009 To: 10/1/2009 Filter Due Issues

[View Report](#)

1 2 3 4 5 6 7

10/1/2009

009

10/1/2009

https://www.hradvance.biz/PlanSmart/Report/frm\_rpt\_pdf.aspx?rpt\_path=%5c%5chrafs2%5cverifyrpts% - Win...

https://www.hradvance.biz/PlanSmart/Report/frm\_rpt\_pdf.aspx?rpt\_path=%5c%5chrafs2%5cverifyrpts%5c804-2062986.pdf

1 / 1

60.9%

Find

**Plan-Smart EDI Report**

Created Date	Import Name	# of Files	Action	Status	Lines File 1	Lines File 2	Hrs Inven
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## 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.

Search Results (1 record)						
Acct#	Subscriber	Address	Client	Period	Status	VerifyStatus
Select 5496	Happy, James	5000 Quorum D...	Sample Co	Sample Period	Closed	80%

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.

Search Results							(1 record)	
Acct#	Subscriber	Address	Client	Period	Status	Verify Status		
Select 5496	Happy, James	5000 Quorum D...	Sample Co	Sample Period	Closed	 80%		
#	Dependent	Type	DOB	Age	Verified?	Dropped?	Failed?	Gatekeep
1	Happy, Karen	Legal Spouse	1/1/1941	69	7/12/2007	Yes		
2	Happy, Joseph	Biological Student	4/1/1983	26	8/7/2009			Maximum Age Passed (7/8/2009-8/7/2009)
3	Happy, Elle	Biological Student	9/22/1986	23	6/24/2008		Yes	
4	Happy, Jimmy	Biological Child	12/1/1989	20	5/7/2008		Yes	Maximum Age Passed (1/1/2008-1/31/2008)
5	Happy, Baby	Child	7/1/2009	0	No			

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

Subscriber Search	Demographics	Data Entry	Audit	Issues	Mailings	Plan-Start	Resources
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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'.

Subscriber Search Demographics Data Entry Audit Issues Mailings Plan-Start Resources

**Subscriber Information**

\*Last Name: Happy \*First Name: James Middle: Gender: SSN: 444-32-1234 Date of Birth: 11/1/1940

\*Address: 5000 Quorum Drive a Address Line 2: Address Line 3: Language: English

\*City: Dallas \*State: TX Zip: 75254 Home Phone: 888-888-8888 Mail Hold til: Reason:

Save Cancel Insert New Dependent Portal Access Custom Text Group Upload Document View Change Log

**Company Information**

EIN: Member Number: Department: Division: Location: Region: Office Phone: Cell Phone: Email: cheinefgiel@yahoo.com Email 2: Hire Date:

**Dependent Information**

	Name	DOB	SSN	Type	Verify	Plan-Smart	OptOut	Fail
Edit	Happy, Karen	1/1/1941		Spouse	✓	✓	✓	
Edit	Happy, Joseph	4/1/1983		Child	✓			✓
Edit	Happy, Elle	9/22/1986		Child	✓	✓		✓
Edit	Happy, Jimmy	12/1/1988		Child	✓			✓

Manually Audit

Last modified by: Lopez, Carrie on 12/18/2009 12:12:59 PM

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

Subscriber Search Demographics Data Entry Audit Issues Mailings Plan-Start Resources

**Dependent Verification Status**

	Code	Type	Verified	Attempt	ManAppr	Failed
Select Happy, Karen	LS	Spouse	dropped	34939		No
Select Happy, Joseph	BS	Child	Yes	789167	✓	No
Select Happy, Elle	BS	Child	Yes	176160	✓	Yes
Select Happy, Jimmy	BC	Child	Yes	151228		Yes
Select Happy, Baby		Child	No			No

Clear Selections

Manual Audit

**Attempts** Exceptions Comments

Attempt	Date	Attempted By
Select 1025431	11/29/2009 7:53:47 PM	Singh, Gobind
Select 878502	9/9/2009 2:51:48 AM	Chamoli, Manju
Select 866087	9/3/2009 2:07:37 PM	Firestone, Craig
Select 866086	9/3/2009 2:07:28 PM	Firestone, Craig
Select 789167	8/7/2009 2:58:15 PM	Lopez, Carrie
Select 789158	8/7/2009 2:56:55 PM	Lopez, Carrie

**Documents** Data Comments

**Documents Received**

DocID	Type	Received	Scan
Select 2191999	Ancillary	11/25/2009	621997
Select 1927415	Other	9/8/2009	541258
Select 1605	Government Issued Marriage Certificate	8/25/2006	389
Select 1606	Federal Tax Return	8/25/2006	388
Select 1607	College Letter of Enrollment	8/25/2006	387

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

**Happy, James (ID:5496)**  
 5000 Quorum Drive a  
 Dallas TX, 75254

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**Client Name:** Sample Co  
**Client Period:** Sample Period (ID:12)  
**Account Manager:** Heinefield, Chris

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

Dependent Verification Status									
	Code	Type	Verified	Attempt	Plan-Guard				
#	Dependent	Type	DOB	Age	Verified?	Dropped?	Failed?		
1	Happy, Karen	Legal Spouse	1/1/1941	69	7/12/2007	Yes			
2	Happy, Joseph	Biological Student	4/1/1983	26	8/7/2009			Maximum Age Passed (7/8/2009-8/7/2009)	
3	Happy, Elle	Biological Student	9/22/1986	23	6/24/2008		Yes		
4	Happy, Jimmy	Biological Child	12/1/1989	20	5/7/2008		Yes	Maximum Age Passed (1/1/2008-1/31/2008)	
5	Happy, Baby	Child	7/1/2009	0	No				

☐ Manual Audit

The 'Envelope' icon represents scheduled outbound mailings and mail status.

Dependent Mailing		
#	Mailing	Date / Event
1	First Reminder	6/15/2008
2	Updated 7/3 - Verification Request Letter	6/26/2008
3	Verification Request Letter	8/1/2009
Event Driven Mailings		
1	B Audit Confirmation	Invalid Documentation
2	B Pay Check Stuffer	Invalid Documentation
3	B Reminder Letter	Invalid Documentation
4	B Termination	Invalid Documentation
5	B Verification Request Letter	Invalid Documentation
6	Open Enrollment Termination Letter	Open Enrollment 30
7	PG - Catch Up - Reminder Letter	Catch-up 22
8	PG - Catch Up Termination Letter	Catch-up 45
9	Sample Letter	Incorrect Documentation

☐ Manual Audit

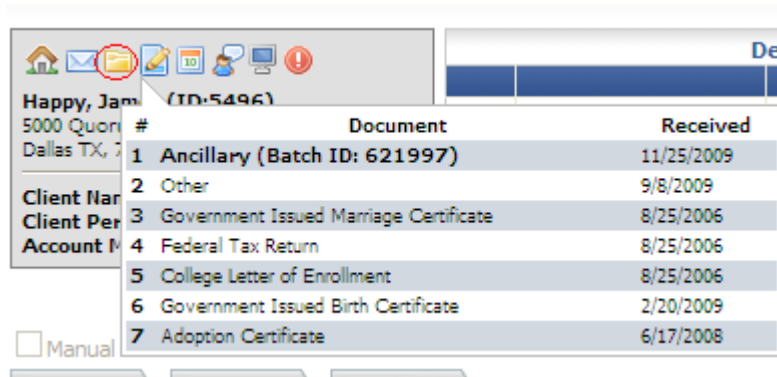
**Atter**

[Select](#)

[Select](#)



The 'Folder' icon represents received inbound documents.




#	Document	Received
1	Ancillary (Batch ID: 621997)	11/25/2009
2	Other	9/8/2009
3	Government Issued Marriage Certificate	8/25/2006
4	Federal Tax Return	8/25/2006
5	College Letter of Enrollment	8/25/2006
6	Government Issued Birth Certificate	2/20/2009
7	Adoption Certificate	6/17/2008

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



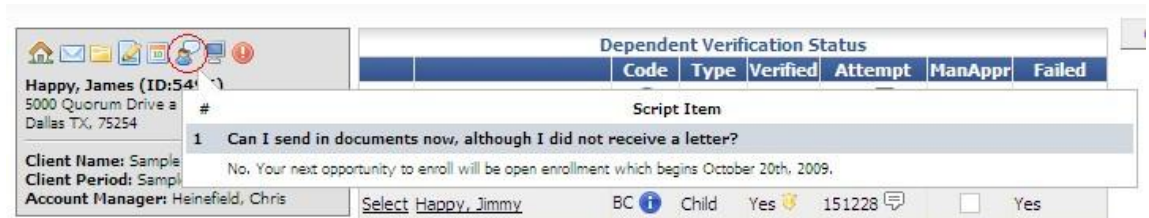
Dependent Verification Status							
	Code	Type	Verified	Attempt	ManAppr	Failed	
Individual Insurance	COBRA?	Common Law?	Claims?	Audit as of Date	Mail	Plans	
www.hradvance.com/ehealth	No	No	No	N/A	PO Box 123, Cambridge, MA 02139	Medical Only	
QMCSSO - Subscriber Only?	PG Only - Student Age Range	PG Only - Overage Age	Fax Number	POE Term (s)			
Yes	19-24	25	877-965-9555	Spring 2010			

The 'Calendar' icon represents date specific project information.



Dependent Verification Status							
	Code	Type	Verified	Attempt	ManAppr	Failed	
Audit Close	Benefits End	Appeals End					
12/31/2006	12/31/2006	1/31/2007					
Client Name: Sample Co	Select Happy, Elle	BS	Child	Yes	176160	Yes	
Client Period: Sample Period (ID:12)	Select Happy, Jimmy	BC	Child	Yes	151228	Yes	
Account Manager: Heinefield, Chris							

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



Dependent Verification Status							
	Code	Type	Verified	Attempt	ManAppr	Failed	
Script Item							
1 Can I send in documents now, although I did not receive a letter?							
No. Your next opportunity to enroll will be open enrollment which begins October 20th, 2009.							
Client Name: Sample Co	Select Happy, Jimmy	BC	Child	Yes	151228	Yes	
Client Period: Sample Period (ID:12)							
Account Manager: Heinefield, Chris							

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

Code	Type	Verified	Attempt
TC	EIN	BirthDate (mmddyy)	7/2/2008

Subscriber Portal Login: **12341940** Password: **Jeremy01!**

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

#	Alert	Expires
1	New Alert	-none-

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.

Code	Type	Info
AC	Adopted Child	i
AS	Adopted Child Student	i
BC	Biological Child	i
BS	Biological Student	i
CC	Certified Child	i
CLS	Common Law Spouse	i
DAC	Disabled Adopted Child	i
DBC	Disabled Biological Child	i

Created	Assigned	Status	Subscriber	Client	Followup
Select Nov 29 2009 7:53PM	Auditor	Closed	Happy, James	Sample Co	X
Select Nov 25 2009 1:59PM	Mailing	Closed	Happy, James	Sample Co	X
Select Nov 25 2009 1:43PM	Mailing	Closed	Happy, James	Sample Co	X
Select Nov 18 2009 2:28PM	Lopez, Carrie	Open	Happy, James	Sample Co	X
Select Nov 4 2009 1:02PM	Lopez, Carrie	Open	Happy, James	Sample Co	X
Select Nov 4 2009 1:02PM	Lopez, Carrie	Open	Happy, James	Sample Co	X
Select Sep 22 2009 1:24PM	Lopez, Carrie	Open	Happy, James	Sample Co	X

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.

				Issues (Showing 25 of 25 total records)	
<a href="#">Select</a>	Jul 9 2009 11:33AM	Auditor	Closed	<a href="#">Happy, James</a>	Sample Co
<a href="#">Select</a>	Jul 9 2009 11:31AM	Auditor	Closed	<a href="#">Happy, James</a>	Sample Co
<a href="#">Select</a>	Jul 9 2009 11:31AM	Auditor	Closed	<a href="#">Happy, James</a>	Sample Co
<a href="#">Select</a>	May 26 2009 1:49PM	Mailing	Closed	<a href="#">Happy, James</a>	Sample Co
<a href="#">Select</a>	May 26 2009 1:48PM	Mailing	Closed	<a href="#">Happy, James</a>	Sample Co
<a href="#">Select</a>	May 20 2009 11:35AM	Heinefield, Chris	Closed	<a href="#">Happy, James</a>	Sample Co
<a href="#">Select</a>	Mar 19 2009 2:49PM	Auditor	Closed	<a href="#">Happy, James</a>	Sample Co
<a href="#">Select</a>	Feb 24 2009 3:08PM	Auditor	Closed	<a href="#">Happy, James</a>	Sample Co
<a href="#">Select</a>	Feb 10 2009 4:30PM	Craig, John	Open	<a href="#">Happy, James</a>	Sample Co

### Issue Information

Date	F	C	
<a href="#">Select</a> May 20 2009 11:35AM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

User: [Heinefield, Chris](#)

Group: [-Select-](#)

Status: [Closed](#)

Tracked By: [Happy, James](#)

Source: [Phone \(Inbound\)](#)

Reason: [Status of audit](#)

Results: [Further research required](#)

☐ Follow Up

Call Back Number:

Email:

☐ Complete

Issue Text: [cc; caller wanted to know status of jimmy's verification.](#)

[Insert New Issue](#)
[Insert New Detail](#)

[Printable Version](#)
[Save Changes](#)

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.

Verification Requirements		
Code	Type	Info
AC	Adopted Child	<a href="#">i</a>
AS	Adopted Child Student	<a href="#">i</a>
BC	Biological Child	<a href="#">i</a>
BS	Biological Student	<a href="#">i</a>
CC	Certified Child	<a href="#">i</a>
CLS	Common Law Spouse	<a href="#">i</a>
DAC	Disabled Adopted Child	<a href="#">i</a>
DBC	Disabled Biological Child	<a href="#">i</a>
DG	Disabled Grandchild	<a href="#">i</a>
FC	Foster Child	<a href="#">i</a>
GC	Grandchild	<a href="#">i</a>
LS	Legal Spouse	<a href="#">i</a>
LW	Legal Ward	<a href="#">i</a>

### 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.

Subscriber Search
Demographics
Data Entry
Audit
Issues
Mailings
Plan-Start
Resources

**Happy, James (ID:5496)**  
5000 Quorum Drive a  
Dallas TX, 75254

**Client Name:** Sample Co  
**Client Period:** Sample Period (ID:12)  
**Account Manager:** Heinefield, Chris

**Filter Mailings**

Date Mailed: From:  To:   
Letter Type:   
Letter Name:   
Letter Status:

Items per page

**Action for Mailings**

Select All | Deselect All (0 of 20 selected)

Goto page:  / 2

12	Select	Subscriber	Letter Name	Mail Event	Queued	Lists	Mailed	Batch	Returned	Status	Info
<input type="checkbox"/>	<a href="#">View</a>	<a href="#">Happy, James</a>	First Reminder		1/26/2010	-none-		<a href="#">1682</a>		Sent to Printer	
<input type="checkbox"/>	<a href="#">View</a>	<a href="#">Happy, James</a>	B Reminder Letter	Invalid Documentation	7/10/2009	-none-	7/16/2009	<a href="#">1448</a>	8/5/2009	Returned NO Fwd Address	
<input type="checkbox"/>	<a href="#">View</a>	<a href="#">Happy, James</a>	B Reminder Letter	Invalid Documentation	3/12/2009	-none-	3/17/2009	<a href="#">1258</a>		Mailed	
<input type="checkbox"/>	<a href="#">View</a>	<a href="#">Happy, James</a>	Open Enrollment Termination Letter	Plan-Guard Period Ended	1/28/2009	-none-	1/30/2009	<a href="#">1199</a>		Mailed	
<input type="checkbox"/>	<a href="#">View</a>	<a href="#">Happy, James</a>	Open Enrollment	Plan-Guard Period	1/28/2009	-none-	1/30/2009	<a href="#">1199</a>		Mailed	

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.

Select	Subscriber	Letter Name	Mail Event	Queued ^	Lists	Mailed	Batch	Returned	Status
<input type="checkbox"/>	<a href="#">View Sample, James</a>	First Reminder		3/10/2011	-none-	3/15/2011	<a href="#">2155</a>	3/29/2011	Returned NO Fwd Address
<input checked="" type="checkbox"/>	<a href="#">View Sample, James</a>	First Reminder		3/9/2011	-none-	3/14/2011	<a href="#">2153</a>		Mailed
<input type="checkbox"/>	<a href="#">View Sample, James</a>	B Reminder Letter	Invalid Documentation	2/8/2011	-none-	2/11/2011	<a href="#">2110</a>	2/25/2011	Returned NO Fwd Address

The screenshot shows a web browser window displaying a report titled "DEPENDENT VERIFICATION CENTER". The report includes the following information:

- P.O. BOX 1415
- LINCOLNSHIRE, IL 60069-1415
- Return Service Requested
- 2153-487-B HARD 03-10-2011
- SAMPLE, JAMES
- 5000 QUORUM DRIVE A
- DALLAS, TX 75254

The browser's address bar shows the URL: [https://www-5.yourdependentverification.com/PlanSmart/Report/frm\\_rpt\\_pdf.aspx?rpt\\_path=%5C%5Cdradvf.d2.hewitt.com](https://www-5.yourdependentverification.com/PlanSmart/Report/frm_rpt_pdf.aspx?rpt_path=%5C%5Cdradvf.d2.hewitt.com). The browser interface includes standard navigation buttons and a zoom level of 78.8%.

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

Subscriber Search

Demographics

Data Entry

Audit

Issues

Mailings

Plan/Start

Resources

US Clerks

Consulates

Document Library

Search

☒ Search by State
 ☐ Search by County

State: TX
 City:
 County:
 Zip:
 Search

State Results

	Office Name	State	
Select	Bureau of Vital Statistics, Dept. of Health	TX	Delete

County Results

	Name	County	State	
Select	Anderson County Clerk	Anderson	TX	Delete
Select	Andrews County Clerk	Andrews	TX	Delete
Select	Angelina County Clerk	Angelina	TX	Delete
Select	Aransas County Clerk	Aransas	TX	Delete
Select	Archer County Clerk	Archer	TX	Delete
Select	Armstrong County Clerk	Armstrong	TX	Delete
Select	Atascosa County Clerk	Atascosa	TX	Delete

Office Information

State Office Name  
 Bureau of Vital Statistics, Dept. of Health

State Office Name 2 (State)

Address 1  
 P. O. Box 12040

Address 2  
 1100 W. 49th Street

City  
 Austin

State  
 TX

Zipcode  
 78711-2040

Phone  
 888-963-7111

Ext

Fax  
 512-458-7711

Birth Certificate

☒ Birth Certificate?

	Start Date	End Date	Cost
1.	1/1/1903		22.00
2.			

Marriage Certificate

☐ Marriage Certificate?

	Start Date	End Date	Cost
1.			
2.			

Insert State

Insert County

Save



## 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.

SELECT PERIOD

» Company specific project periods

SUBSCRIBERS

» Subscriber search & data entry

MAILINGS

» View, batch, print, etc. mailings

REPORTS

» View project reports

LOGOFF

» Return to the login screen

Filter Mailings

Date Mailed: From:  To:   
Letter Type:   
Letter Name:   
Letter Status:  SubID:   
Batch Creator:  Batch ID:   
Client:  Period:   
   Items per page

Manually Update Queue

From:   
To:

Action for Mailing:

Select All Deselect All (0 of 10 selected)

Prev Next Goto page: 1 / 1 Go

Select	Subscriber	Letter Name	Mail Event	Queued	Lists	Mailed	Batch	Returned	Status
<input type="checkbox"/>	<a href="#">View</a> Brady, Tom	Verification Request		11/1/2006	-none-				Voided
<input type="checkbox"/>	<a href="#">View</a> Chew, Billy	Verification Request		11/1/2006	-none-				Voided
<input type="checkbox"/>	<a href="#">View</a> Doe, John	Verification Request		11/1/2006	-none-				Voided
<input type="checkbox"/>	<a href="#">View</a> Gilmore, Happy	Verification Request		11/1/2006	-none-				Voided
<input checked="" type="checkbox"/>	<a href="#">View</a> Happy, James	Verification Request		11/1/2006	-none-	11/1/2006 416			Mailed
<input checked="" type="checkbox"/>	<a href="#">View</a> Happy, James	Verification Request		6/6/2008	-none-	6/10/2008 818			Mailed
<input type="checkbox"/>	<a href="#">View</a> Heart, Matthew	Verification Request		11/1/2006	-none-				Voided

## 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.

SELECT COMPANY

» User specific companies

SELECT PERIOD

» Company specific project periods

SUBSCRIBERS

» Subscriber search & data entry

CLIENT ISSUES

» Manage & schedule client issues

MAILINGS

» View, batch, print, etc. mailings

DEPENDENT TYPES

» Set up dependent types

VERIFICATION

» Set up accepted verification sets

COMMUNICATIONS

» Set up mailings, issues, & emails

REPORTS

» View project reports

RECEIVED DOCUMENTS

» Manage scan queue & mail prep

QUALITY CONTROL

» Data entry quality control

Report Group:

Step 1: Select Category

Category
<a href="#">Select</a> Company Reports
<a href="#">Select</a> Data Extracts
<a href="#">Select</a> Documents
<a href="#">Select</a> Internal Reporting
<a href="#">Select</a> Issues
<a href="#">Select</a> Mailings
<a href="#">Select</a> Statistics Reports
<a href="#">Select</a> Verification Status Reports

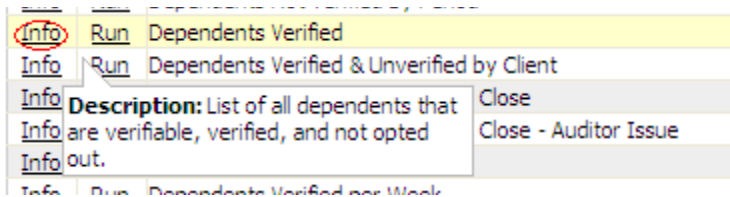
Step 2: Select Report

Reports
<a href="#">Select</a> Summary
<a href="#">Select</a> Employee Reporting
<a href="#">Select</a> Utilization

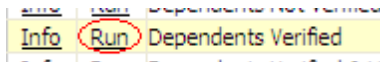
Step 3: Select Version

Version
<a href="#">Info</a> <a href="#">Run</a> Plan-Smart Project Summary
<a href="#">Info</a> <a href="#">Run</a> Plan-Smart Project Summary (Real-Time)
<a href="#">Info</a> <a href="#">Run</a> Plan-Smart Verification Summary
<a href="#">Info</a> <a href="#">Run</a> Plan-Guard Verification Summary

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.

### Dependents Verified

List of all dependents that are verifiable, verified, and not opted out.

**Step 4: Select Company & Project**

Company:

Project:

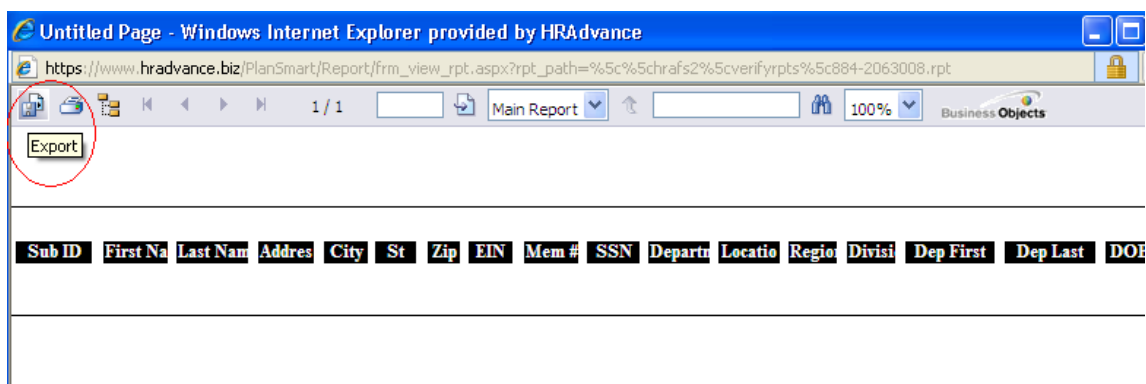
From Date:  To Date:

**Step 5: Retrieve Report**

☐ PDF
 ☒ 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.



### Export Options

Please select an Export format from the list.

Enter the page range that you want to Export.

☒ All

☐ Pages

From:  To:

Formats: ▼

Formats:

- Crystal Reports (RPT)
- Acrobat Format (PDF)
- MS Word
- MS Excel 97-2000
- MS Excel 97-2000 (Data Only)
- Rich Text Format

Open your report in the specified format.

### Export Options

Please select an Export format from the list.

MS Excel 97-2000 (Data Only) ▼

Enter the page range that you want to Export.

☒ All

☐ Pages

From:  To:

**File Download** ✕

**Do you want to open or save this file?**

Name: CrystalReportViewer1.xls

Type: Microsoft Office Excel 97-2003 Worksheet, 10.5KB

From: **www.hradvance.biz**

☒ Always ask before opening this type of file

While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. [What's the risk?](#)

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

frm_view_rpt [Read-Only] [Compatibility Mode]											
	A	B	C	D	E	F	G	H	I	J	K
1			#####								
2	Sub ID	First Na	Last Na	Address	City	St	Zip	EIN	Mem #	SSN	Departm
3											
4	Totals:		Subscribers	Dependents							
5											

### \*\*\*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.

Plan-Smart Menu


You are now logged off.

User Login

Login:

Password:

Login



SSL Certs

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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