



BROKER

October 2018 Release Notes

1 Reporting: Employee's and Dependents' Primary Care Physician(s)

- a. Using Onboarding Questions, Carrier Form Custom Text Fields, or Custom Questions - BerniePortal has long had the general ability to allow asking employees who their primary care physician is.
- b. Some carriers require this information when adding the employee via the insurance company's website. Furthermore, some HR users and broker partners have shared with us that they would find it helpful to be able to pull it for all employees on a spreadsheet report rather than looking in the employee's individual record. This was something BerniePortal didn't support before this update.
- c. With this update, if the user has indicated that a Plan of the Health benefit type requires knowing the Primary Care Physician on the Plan Configure page, the employee will be asked who it is for him/herself and any dependent who they are enrolling in the health plan. HR will then be able to see the employee's answers on the All Data Report.

2 Reporting: new "Employee SSN" column

- a. BerniePortal reports have long had a column for Social Security Numbers.
- b. This new column contains the Social Security Number of the individual by virtue of whose employment the individual listed is able to be on the plan.
- c. Example: John works at Acme. Susan is married to John. It is by virtue of John working at Acme that Susan can be on the plan. The "Employee SSN" column for Susan's row in the spreadsheet will contain John's SSN. For John's row it will also include John's SSN.
- d. We have added this because it makes it easier to use spreadsheet sorting tools and keep the dependents next to the correct employee when sorting.

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