FAQ: Policyholder's Guide to Accessing OneAmerica Disability Claims Reporting

Access

Policyholder Reports

Tax Reports

How can I access claims disability reports?

As a policyholder, you can access claims disability reports within the **One America Employee Benefits** (eBen) portal. If you are not already registered for this portal and need access to Disability Claim Reporting, authorization must first be provided by the authorized employer representative to ensure we maintain confidentiality.

New users who need access to reporting:
If there are individuals who have not previously been authorized to receive reporting and you would like them to have access to this new reporting feature, you may do so by completing the Contact Information Change Form for Group Insurance Policyholders. This Change Form will need to be completed and signed by the authorized employer representative. The Change Form cannot be accepted from a user that is not the policyholder. To protect this sensitive data, this action is required to grant reporting access. We appreciate your understanding.

Where to submit the completed Change Form
Please email the completed form to GroupContactCenter@oneamerica.com. If you have any questions on how to complete this form, please reach out to the Group Contact Center at 800-553-5318 to speak to one of our Customer Service Representatives.

Once the Change Form is received and processed by OneAmerica, a confirmation email will be sent with credentials and a registration guide to complete the registration for eBen access.

Where do I go in the portal to access reports?

A policyholder who is logged into the eBen portal will select **My Employees**, then **Disability Claims Reporting** from the left-hand navigation menu, and then choose a sub-menu option, depending on which report they want to access.

- The Disability Tax Reports each have their own menu option.
- For any of the Policyholder Reports, simply select **Policyholder Reports**, and then on a subsequent page you can choose the one you wish to access.
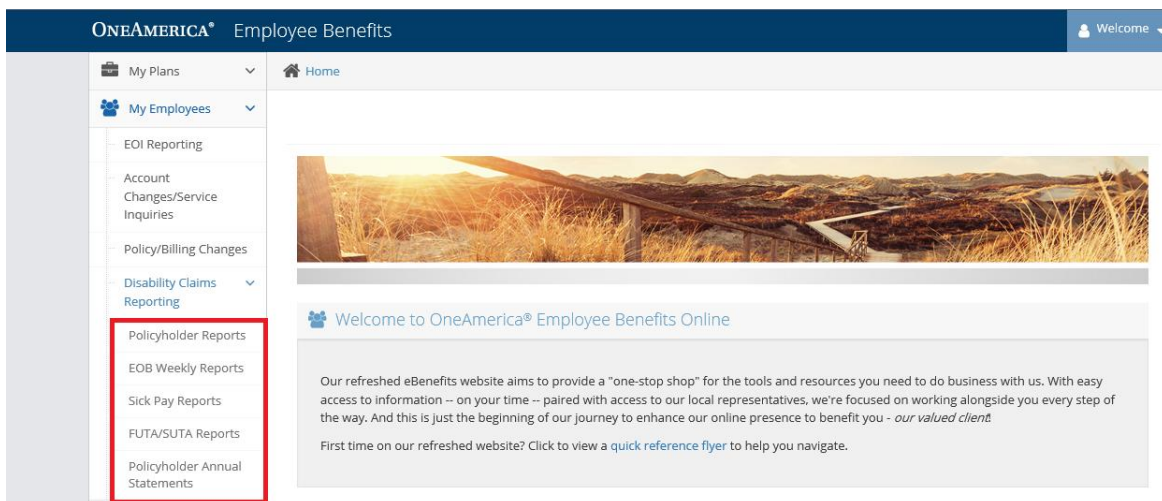
How will I know when reports are ready to view?

If a policyholder or authorized user is registered for the eBen portal (and has a valid email address associated with the account), then emails will be sent to them when the **Disability Tax Reports** are ready to view in the portal. If you are a policyholder and are not getting the emails, please check your spam mail folder.

You may view the **Policyholder Reports** anytime, since they are within the self-service feature and, therefore, are available to run at any time. The data provided within these reports reflect the prior day's claim information. There are no notifications for these.

What Policyholder Reports are available in the portal?

There are various Policyholder reports, allowing the user to access **prior day claim data**. These reports include:

- **Disability Claim Status Report – All Claims**
  This report provides higher level disability claim information and claim status for all open and closed claims since inception

- **Disability Claim Detail Report – All Claims**
  Similar to the status report, this report provides more detailed disability claim data for all open and closed claims since inception

- **Disability Claim Detail Report – Closed Claims by Time Frame**
  This report provides detailed disability claim information on only closed claims, for the time frame specified

- **Disability Payments by Time Frame**
  This report provides the disability claim payments that were issued by claim, for the time frame specified

- **Disability Premium Waiver**
  This report provides the dates that waiver of premium for disability premium would commence and end. Blank dates on the report indicate waiver is not applicable at the time of report run

After I select Policyholder Reports on the menu, what do I do to bring up a report?

If the user selected the **Policyholder Reports** menu option, then instead of going to a page with links to point-in-time reports, the user will go to a page like the one below. There, they can choose which prior day, data report they want to run.

Policyholder List Page

Depending on reporting access provided, some policyholders will have a list of policyholder numbers from which to choose. They should choose the policyholder number(s) for which they want to view a report by clicking on the **Policyholder Number** in the list, or by selecting a checkbox next to one or more policyholders. Then they should click **Submit**. *Note: Not all policyholders will need to select from a list of policyholders. Those who don't can l just skip to the next page.*

To view reports, first click on a policyholder number. To view reports for more than one, select check boxes and then 'Submit'.

Show 25 ⌄ entries   Filter Results [   ]

	Policyholder Number ▲	Policyholder Name
☑	00099999-1111-001	Policyholder ABC
☐	00099999-1111-002	Policyholder ABC

Showing 1 to 2 of 2 entries   Previous [1] Next

[Submit]

Reports List Page

The next page allows a user to choose the type of policyholder report they want to view.

My Employees » Disability Claims Reporting » Policyholder Reports

To preview a report, select a report name and, if applicable, enter a date range.

Report Name

| Select ⌄ |

Select
Disability Claim Detail Report - All Claims
Disability Claim Detail Report - Closed Claims by Timeframe
Disability Claim Payments by Timeframe
Disability Claim Status Report - All Claims
Disability Premium Waiver

When a user selects a report name from the drop-down box, the description of the report appears on the page. Depending on the report selected, the user may also be prompted to enter a start and end date.

To preview a report, select a report name and, if applicable, enter a date range.

Report Name	Report Description
Disability Claim Status Report - Closed Claims by Timeframe ⌄	This report provides higher level disability claim information and claim status on only closed claims, for the timeframe specified.

Start Date (MM/DD/YYYY)

03/25/2020 📅

End Date (MM/DD/YYYY)

11/11/2020 📅

Preview

Back

When **Preview** is clicked, it produces the policyholder report in Microsoft Excel format.

Note: If the report or any tabs on the report are blank, this result indicates that there is no applicable claim data available for that report time period.

What Disability Tax Reports are available in the portal?

The Disability Tax Reports are **point-in-time** reports. They include:

- Explanation of Benefit (EOB) Weekly Reports
- Sick Pay Reports
- FUTA/SUTA Reports
- Policyholder Annual Statements

How often are the point-in-time Disability Tax Reports generated?

- **Explanation of Benefit (EOB) Weekly Reports**
  Available on the 2nd business day of the week

- **Sick Pay Reports**
  There are monthly and quarterly versions of these reports
    - *Monthly: available on the 2nd business day of the month*
    - *Quarterly: available on the 3rd business day of the quarter*

- **FUTA/SUTA Reports**
  Available on the 2nd business day of the month

- **Policyholder Annual Statements**
  Available on the 3rd business day of the year

After I select a Disability Tax Report on the menu, what do I do to bring up a report?

Policyholder List Page

After selecting a type of financial report on the menu, depending on reporting access provided, some policyholders will have a list of policyholder numbers to choose from. They should choose the policyholder number(s) for which they want to view a report by clicking on the **Policyholder Number** in the list, or by selecting a checkbox next to one or more policyholders. Then they should click **Submit**. *Note: Not all policyholders will need to select from a list of policyholders. For those who don't, they can skip to the next page.*

To view reports, first click on a policyholder number. To view reports for more than one, select check boxes and then 'Submit'.

Show 25 ∨ entries   Filter Results [   ]

	Policyholder Number ▲	Policyholder Name ▲
☑	00099999-1111-001	Policyholder ABC
☐	00099999-1111-002	Policyholder ABC

Showing 1 to 2 of 2 entries   Previous | 1 | Next

Submit

Select Time Frame Page (only applies to sick pay reports and FUTA/SUTA reports)

Only for sick pay reports and FUTA/SUTA reports, the next page allows the user to choose a time frame for the report(s) they want to see (and then they can click **Submit** to get to the next page showing report links).

Note: The page below is bypassed for EOB reports that don't require a date range, since the eBen portal will just show weekly reports going back to the beginning of the previous quarter.

It's also bypassed for Policyholder Annual Statements where the eBen portal shows reports from all time.

- The start date is defaulted as the beginning of the calendar year.
  - Unless the current date is in January, then the start date will be defaulted to the first of December of the previous month.
- The end date is defaulted to the current date.
- There is also a **Show last 18 months** option the user can select.

Financial Report Links Page

For all the financial reports (Sick Pay, FUTA/SUTA, EOB and Policyholder Annual Statements), hyperlinks shall be displayed for point-in-time reports that were found. The policyholder should just click on the link of the report they want to view within their browser. If they want to, they can even save the report onto their computer.

Note: Depending on the browser used, the report will open differently. For Internet Explorer, Firefox and Safari browsers, the report will open in a new tab. For Chrome, Edge and other browsers, the report will be downloaded with a link at the bottom left side of the existing browser window.

Sick Pay Reports – Example of Links Page:

FUTA/SUTA Reports – Example of Links Page:

EOB Reports – Example of Links Page:

00099999-1111-000 - Policyholder ABC
WEEKLY REPORTS
08/08/20
08/01/20

Policyholder Annual Statements – Example of Links Page:

00099999-1111-000 - Policyholder ABC
ANNUAL STATEMENTS
2017
2018
2019