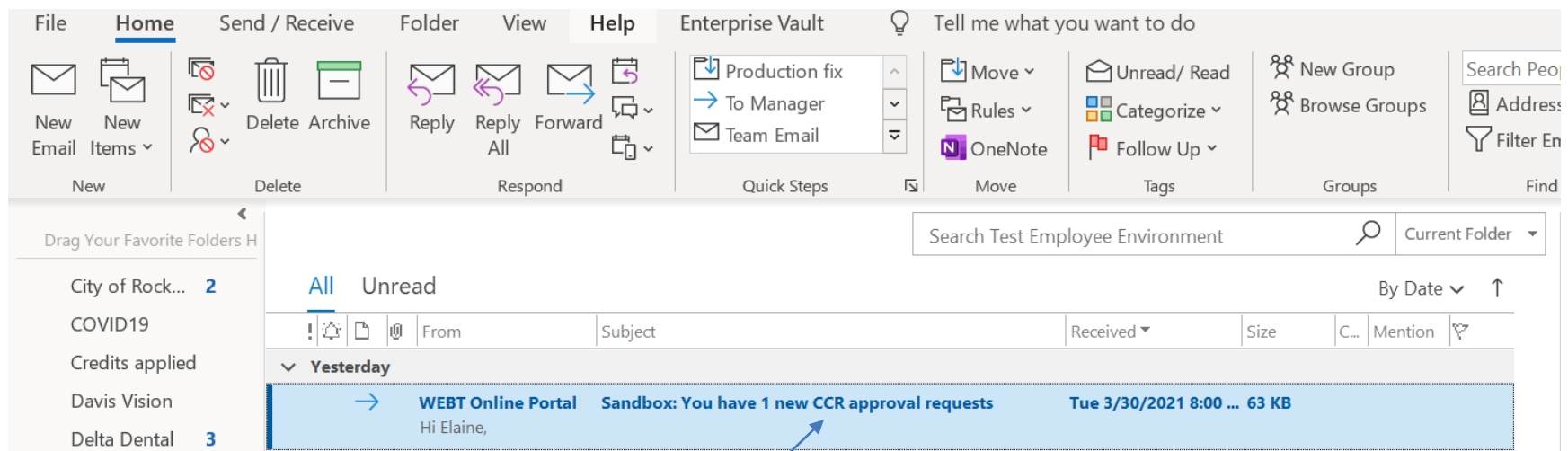# Welcome to reviewing and approving WEBT Online Employee Portal enrollments, membership changes, and updates!

This guide will walk you through the process of reviewing Employee submitted enrollments, membership changes, and other membership related items (life events, open enrollment, etc.).   This guide may be used for new hires and/or current enrollees making changes to their current and/or future coverages and members.

Once an employee establishes their WEBT Online Portal Account, elects' his/her benefits, and submits their selections, you, as the Group Admin, will receive an email from the WEBT Portal:



Please note:  The term "CCR" refers to "Coverage Change Request"

<u>Please open the email and utilize the "here" button to enter the Portal and access your approval request(s):</u>

## Sandbox: You have 1 new CCR approval requests

WO  WEBT Online Portal <webtcommunity@gmail.com>
To  ● Anderson, Elaine

ⓘ You forwarded this message on 3/31/2021 11:51 AM.

↩ Reply    ↩ Reply All    → Forward    •••

Tue 3/30/2021 8:00 AM

Hi Elaine,

Please click <u>here</u> to view and manage your open approval requests.

You have received 1 approval request(s) in the past 24 hours and you have a total of 2 open approval requests.
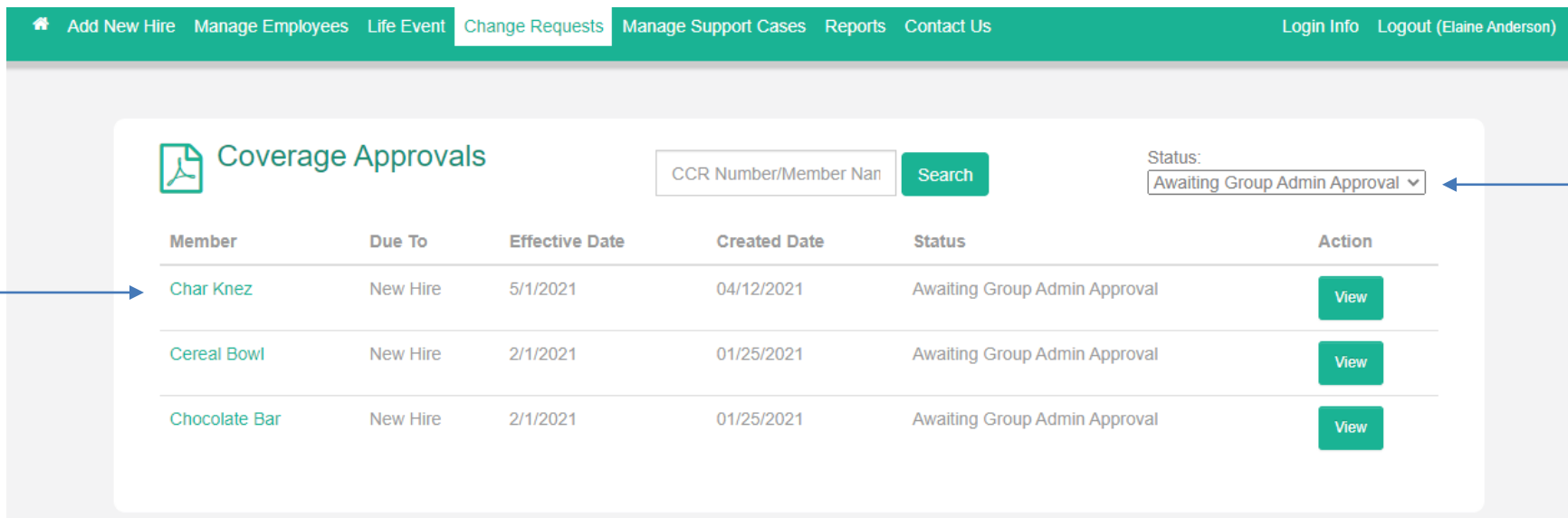
Thank you
WEBT

<u>Once you enter the Portal please utilize the Change Requests link to begin</u>.

| 🏠 Add New Hire | Manage Employees | Life Event | Change Requests | Manage Support Cases | Reports | Contact Us | | Login Info | Logout (Elaine Anderson) |

**Test Group**

**Welcome to the WEBT Online Portal! A place to manage your employees and their eligible dependents, change coverages and review standardized reports pertaining to your membership. Feel free to open a case under the "Manage Support Cases" section to request information on benefits/eligibility, claims and/or enrollment! You may also request a new ID card or any WEBT supplies you may need.**

All outstanding Coverage Change Requests for your group will be listed by member along with a description of the member request and the date on which the request was created:

| | Add New Hire | Manage Employees | Life Event | Change Requests | Manage Support Cases | Reports | Contact Us | Login Info | Logout (Elaine Anderson) |

## Coverage Approvals

CCR Number/Member Nan [ Search ]

Status:
Awaiting Group Admin Approval ⌄

| Member | Due To | Effective Date | Created Date | Status | Action |
|--------|--------|----------------|--------------|--------|--------|
| Char Knez | New Hire | 5/1/2021 | 04/12/2021 | Awaiting Group Admin Approval | View |
| Cereal Bowl | New Hire | 2/1/2021 | 01/25/2021 | Awaiting Group Admin Approval | View |
| Chocolate Bar | New Hire | 2/1/2021 | 01/25/2021 | Awaiting Group Admin Approval | View |

You may utilize the "Status" drop down to see if there are any outstanding items from the Group Admin side, the WEBT Associate side and/or track any items that may have been approved or rejected.   You may also utilize the "Search" button by CCR Number or Member Name to search for any previous CCRs.
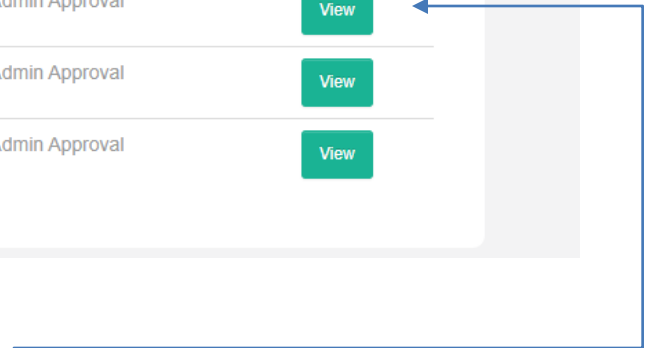
## Coverage Approvals

CCR Number/Member Nam [ Search ]

Status:
Awaiting Group Admin Approval ▾

| Member | Due To | Effective Date | Created Date | Status | Action |
|---|---|---|---|---|---|
| Char Knez | New Hire | 5/1/2021 | 04/12/2021 | Awaiting Group Admin Approval | View |
| Cereal Bowl | New Hire | 2/1/2021 | 01/25/2021 | Awaiting Group Admin Approval | View |
| Chocolate Bar | New Hire | 2/1/2021 | 01/25/2021 | Awaiting Group Admin Approval | View |

Please click on the "View" button to access, and review the Coverage Change Request.

The Change Request Detail page will provide you with specific information on the request, including the member name, the effective date of the change, a status of the approval process and the reason for the request.

## Change Request Detail
### CCR 5099

Back

| | | | |
|---|---|---|---|
| **Member Name** | Char Knez | **Effective Date** | 5/1/2021 |
| **Status** | Awaiting Group Admin Approval | **Due To** | New Hire |
| **Last Date of Employment** | | **Family Termination Date** | |
| **Created Date** | 4/12/2021 8:23 AM | | |

### Approver Comments

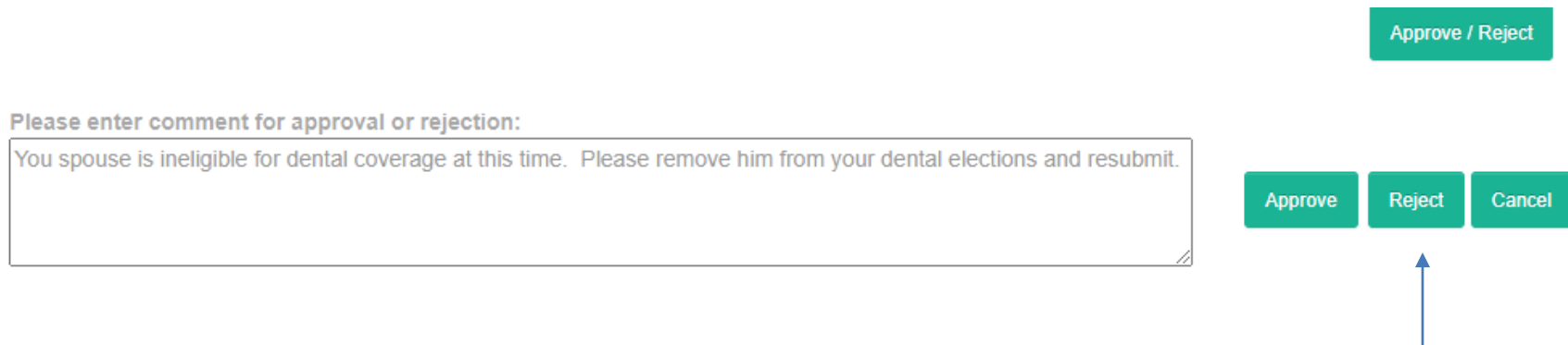| Comment | Status | Date |
|---|---|---|
| Submitting request for approval automatically. | Started | 4/12/2021 8:23 AM |

### Affected Dependents

| | Name | Relationship | Age | Plan | Plan Type | Start Date | Coverage Tier |
|---|---|---|---|---|---|---|---|
| | Char Knez | | 58 | $1,000 Deductible | Medical | 5/1/2021 | 2 Adult |
| | Kayle Cross | Spouse | 58 | $1,000 Deductible | Medical | 5/1/2021 | 2 Adult |
| | Char Knez | | 58 | WEBT High Option Dental | Dental | 5/1/2021 | 2 Adult |
| | Kayle Cross | Spouse | 58 | WEBT High Option Dental | Dental | 5/1/2021 | 2 Adult |
| + | Char Knez | | 58 | Life | Secondary | 5/1/2021 | Single |

**Approve / Reject**

Please take a moment to review the information provided prior to utilizing the "Approve/Reject" button.
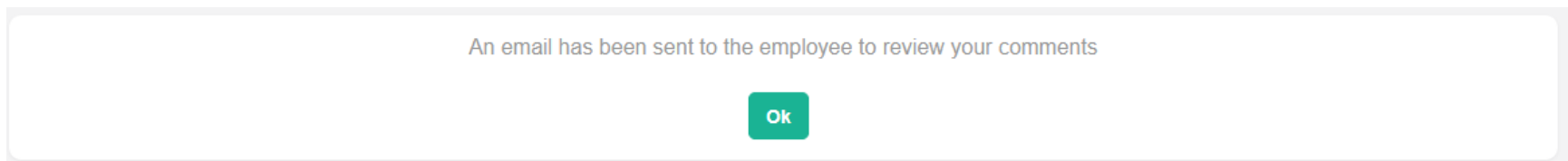
Once you utilize the Approve/Reject button, a comment box will appear in which you may enter any notes you feel pertinent to the request.

Approve / Reject

Please enter comment for approval or rejection:

You spouse is ineligible for dental coverage at this time.  Please remove him from your dental elections and resubmit.

Approve    Reject    Cancel

Once you have entered your comments in the comment box, please utilize the appropriate button to submit your decision.  You may return to the "Approve/Reject" button by utlizing the "Cancel" button.

In this example, we are utilizing the "Reject" button, which will redirect you to a confirmation screen indicating that your decision has been sent to the enrollee for review.

An email has been sent to the employee to review your comments

Ok

One your member has retrieved his/her rejection email, he/she will log into the system, make any requested changes and resubmit their enrollment to you for final review and approval. You will receive notification of the rebsumission through email, and will be redirected to the system for confirmation.



Please click on the "View" button to access, and review the Coverage Change Request.

## Change Request Detail
CCR 5099

Back

| | | | |
|---|---|---|---|
| **Member Name** | Char Knez | **Effective Date** | 5/1/2021 |
| **Status** | Awaiting Group Admin Approval | **Due To** | New Hire |
| **Last Date of Employment** | | **Family Termination Date** | |
| **Created Date** | 4/12/2021 8:23 AM | | |

### Approver Comments

| Comment | Status | Date |
|---|---|---|
| Submitting request for approval automatically. | Started | 4/12/2021 8:23 AM |
| You spouse is ineligible for dental coverage at this time. Please remove him from your dental elections and resubmit. | Rejected | 4/12/2021 9:04 AM |
| Submitting request for approval automatically. | Started | 4/12/2021 9:28 AM |

You may follow the trail of the approval process by referring to the Approver Comments Section to revisit the rejection reason and confirm that the required changes were made.

## Affected Dependents

| Name | Relationship | Age | Plan | Plan Type | Start Date | Coverage Tier |
|------|-------------|-----|------|-----------|-----------|---------------|
| Char Knez | | 58 | $1,000 Deductible | Medical | 5/1/2021 | 2 Adult |
| Kayle Cross | Spouse | 58 | $1,000 Deductible | Medical | 5/1/2021 | 2 Adult |
| Char Knez | | 58 | WEBT High Option Dental | Dental | 5/1/2021 | Single |
| + Char Knez | | 58 | Life | Secondary | 5/1/2021 | Single |

**Approve / Reject**

Please take a moment to review the information provided prior to utilizing the "Approve/Reject" button.

Please enter comment for approval or rejection:

Please add Char to coverage. Thank you :-)

**Approve**  **Reject**  **Cancel**

Once you utilize the Approve/Reject button, a comment box will appear in which you may enter any notes you feel pertinent to the request.

In this example, we are utilizing the "Approve" button, which will redirect you to a confirmation screen indicating that your decision has been sent to the WEBT Team for review.

This has now been sent to the WEBT team for review

At this point, your approval has been submitted to your WEBT Associate for final review and approval.  **Please Note**:  All submissions are presented to WEBT the day following your approval.

Once WEBT has reviewed, approved, or rejected your submitted CCR, you will be notified via email:

**From:** WEBT Online Portal <webtcommunity@gmail.com>
**Sent:** Tuesday, April 13, 2021 3:58 PM
**To:** Anderson, Elaine <Elaine.M.Anderson@WillisTowersWatson.com>
**Subject:** Sandbox: CCR 5099 has been Approved

Hi ,

CCR 5099 request for Employee **Char Knez** with effective date **5/1/2021** due to reason **New Hire** has been approved by Associate User.

**Associate's Approval Comment** : This member has been added. Thank you!

Please see the link below :
https://full-webt-production.cs124.force.com/webt/CCR_detail?ccrId=a0E3J000000xopSUAQ

Thanks
WEBT Online Portal

Please take a moment to review the information provided to ensure your member is set up correctly or if you are required to make any changes to resubmit for final approval.

*Please feel free to contact your Account Manager via email or contact the WEBT/Willis Towers Watson office at (307) 634-5566 should you need assistance with your employer site.*