

“

What kind of
troubleshooting are you
investigating regularly?

”

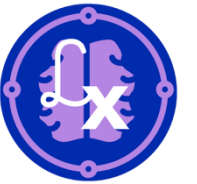


Learnsynx
Mastering Knowledge, Together.

Winter Warmups

Troubleshooting in THEbenefitsHUB

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A Few Reminders...



Questions



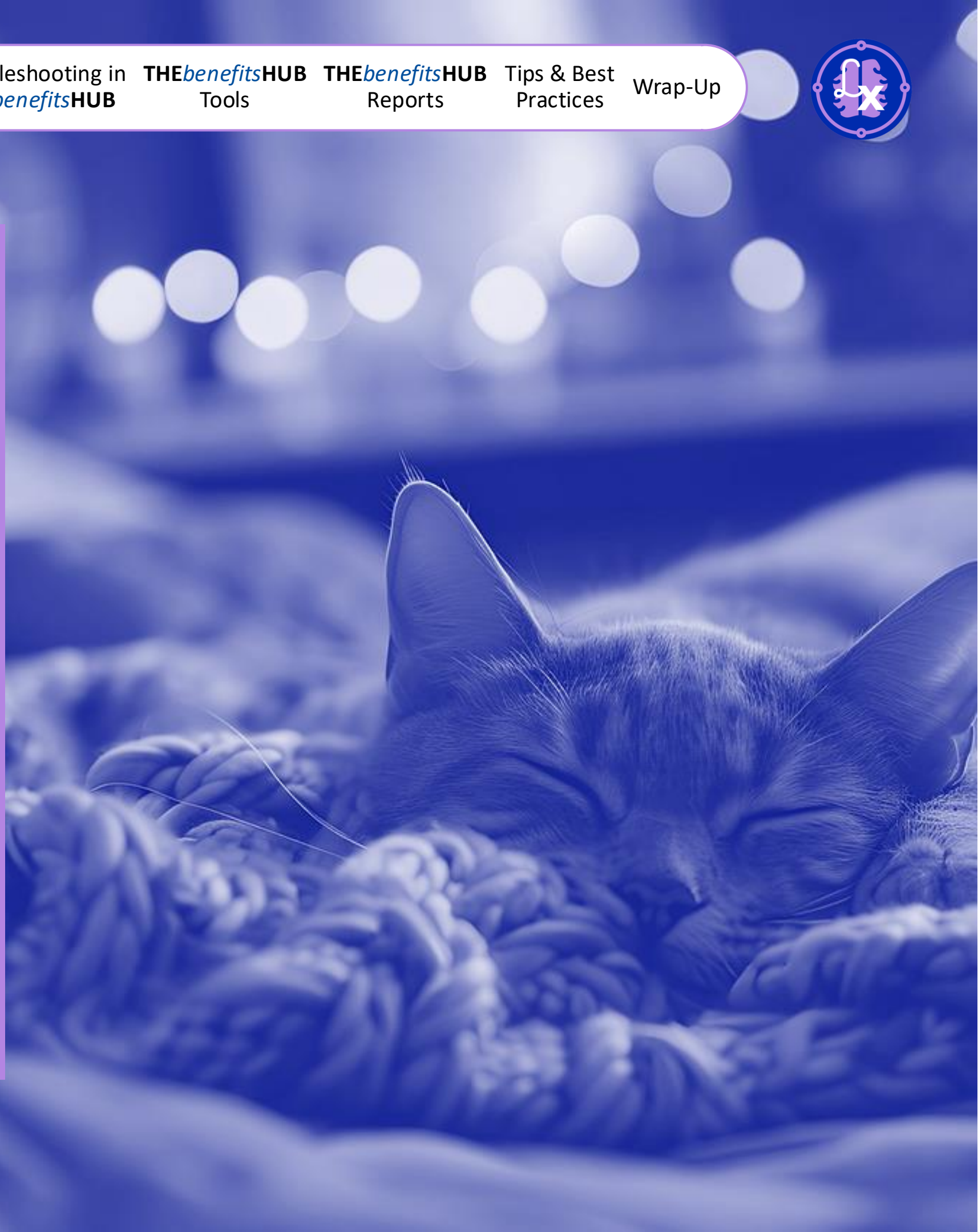
Chat



Handout & Recordings



Your Feedback





Today's Presenter:



Liz Gerlach
Training Supervisor



Objectives

By the end of today's webinar...



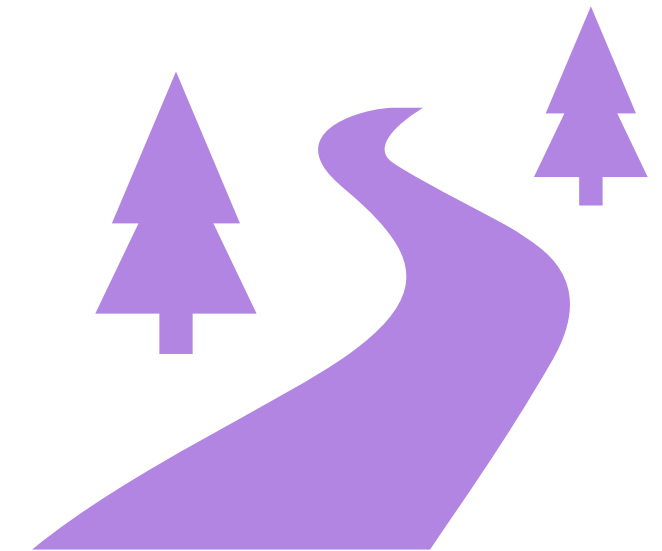
Find Your Footing

Identify issues and determine the best path for resolution



Clear The Path

Explore tools and strategies to best avoid roadblocks



Stay on Track

Turn techniques into action with real-world scenarios

“

Which tools do you currently
use in **THE***benefits***HUB** to
troubleshoot?

”



01

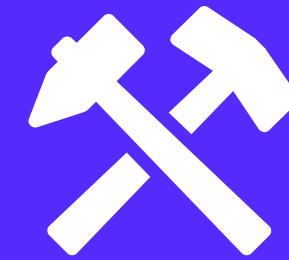


Researching vs. Troubleshooting



Researching

- Curiosity-driven
- Broad & exploratory
- May not involve a problem



Troubleshooting

- Problem-driven
- Narrow & focused
- Action-oriented

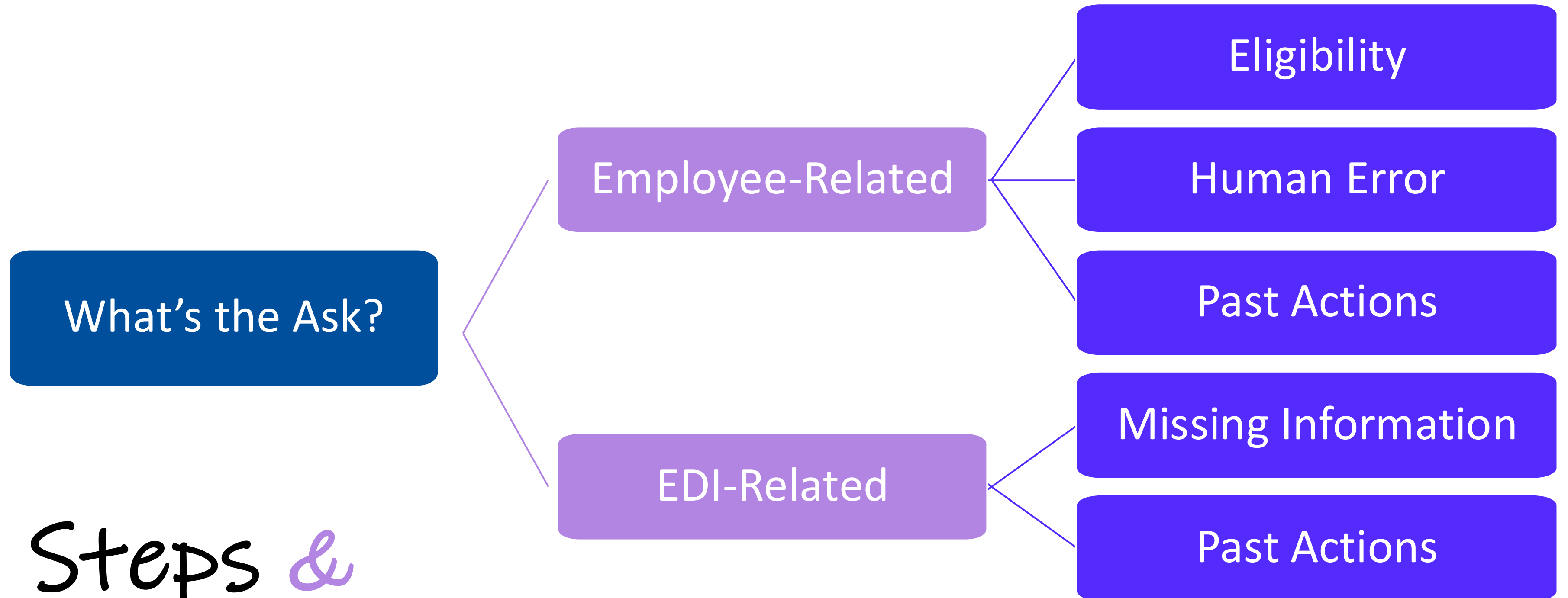
Research *explores* information; troubleshooting
applies research to a problem.

“

We can't solve a problem until
you're asking the right question.

Carl Jung, Swiss Psychiatrist

”



Steps &
Resolutions



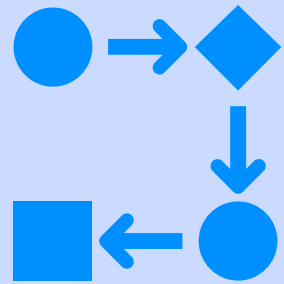
02



Eligibility Matters



Eligibility in **THEbenefitsHUB**



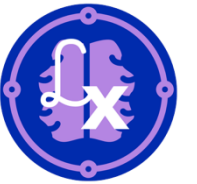
Process for knowing whether an employee and/or their dependents can enroll in a plan



People-centered and based on many possible criteria



Built into plans behind-the-scenes



Employee Eligibility Triggers



Salary



Hours Worked



Age



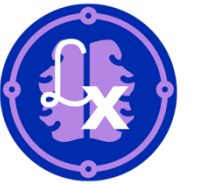
Enrolled Plans



Division



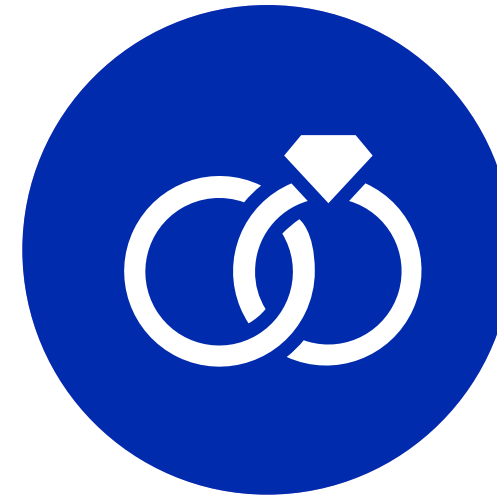
Status



Dependent Eligibility Triggers



Age



Marital Status



Relation Type



Disability Status



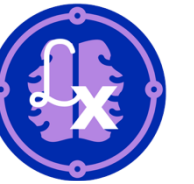
Student Status



03



Discerning Discrepancies



INELIGIBLE MEMBER NOTIFICATION SYSTEM

Please select one or more notifications and divisions you would like to run the IMNS report for, and then click the “Run” button below to review the report. After your initial report is finished, you may alter your selections and click the “Refresh” button to update the report. You may convert your report to CSV/Excel by clicking the “Export All To CSV” button.

- Select Notifications:
- | | |
|---|--|
| ☐ 18 Month COBRA Notification | ☐ Basic Life Reduction Notification |
| ☐ Duplicate SSN | ☐ Duplicate Social Security Numbers Within An Employee's Record |
| ☐ Employees Missing Addresses | ☐ Elections In More Than One Medical Option |
| ☐ Employees Missing Pay Frequency | ☐ Employees Missing Beneficiaries |
| ☐ Inactive Dependents with Active Elections | ☐ Employees Missing Payroll ID Number |
| ☐ Incomplete New Hire Window | ☐ Inactive Employees With Future Elections |
| ☐ Invalid Tax Elections | ☐ Invalid Character Data |
| ☐ Missing PCPs | ☐ Married Employees |
| ☐ Newly Added Dependents with No Benefits | ☐ New Hires with Actively at Work Election |
| ☐ OneAmerica ESOI Cancellations - Next 30 Days | ☐ OneAmerica EOI Status |
| ☐ Zip Code Eligibility | ☐ Qualified Medical Support Order - Missing Benefits |

Select Divisions:

Available

>

>>

<

<<

Selected

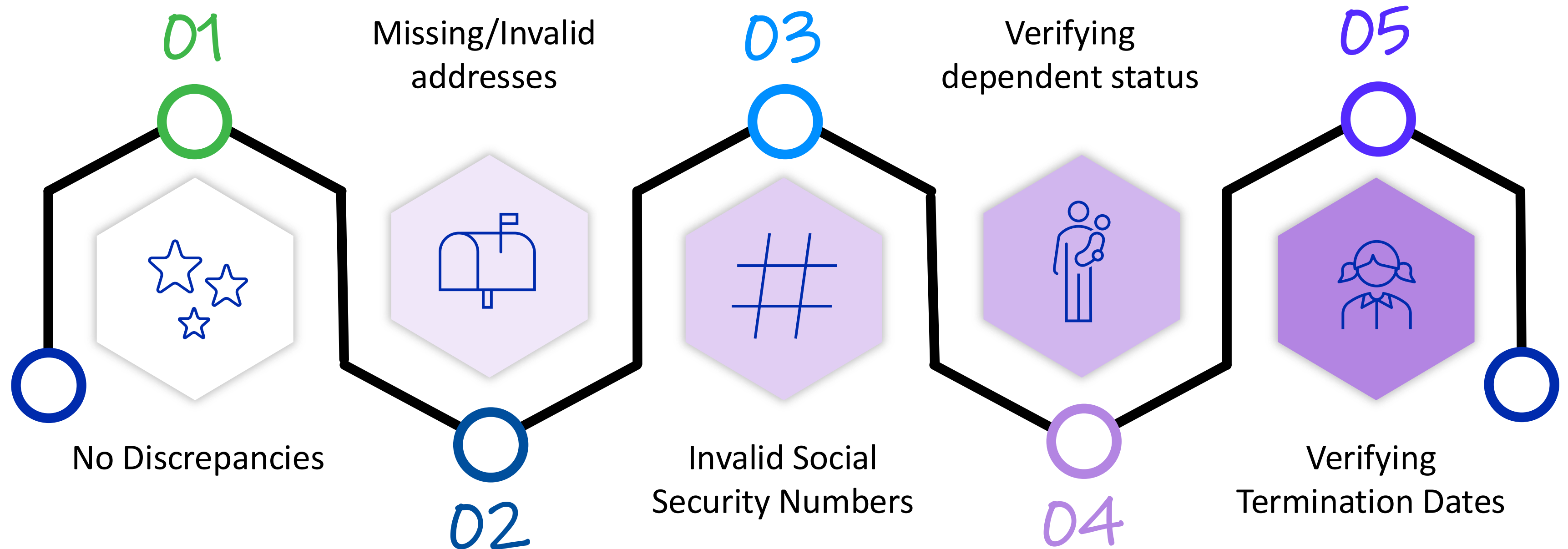
Austin Office
Dallas Office

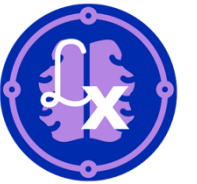
Run

Export All To CSV

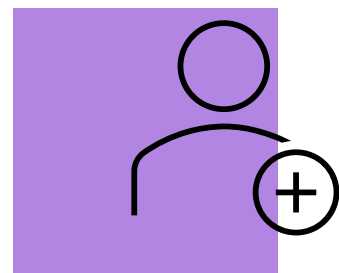


Common Discrepancy Report Results





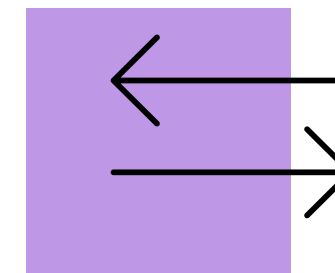
Discrepancy Actions



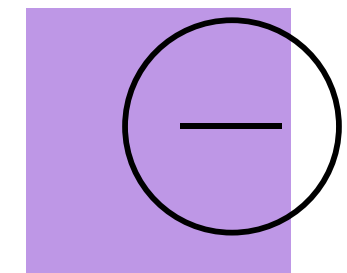
Adds



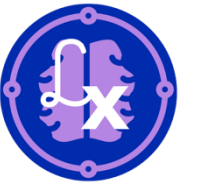
Reinstatements



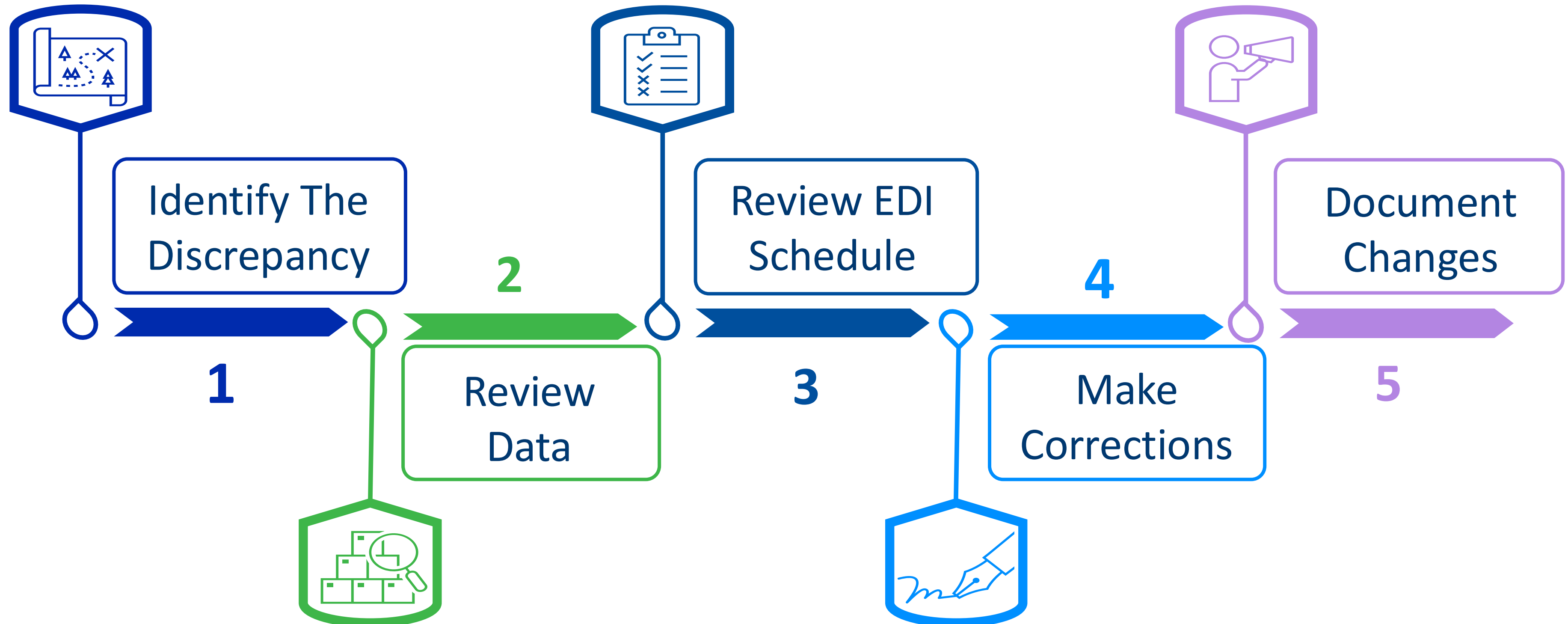
Changes



Terminations

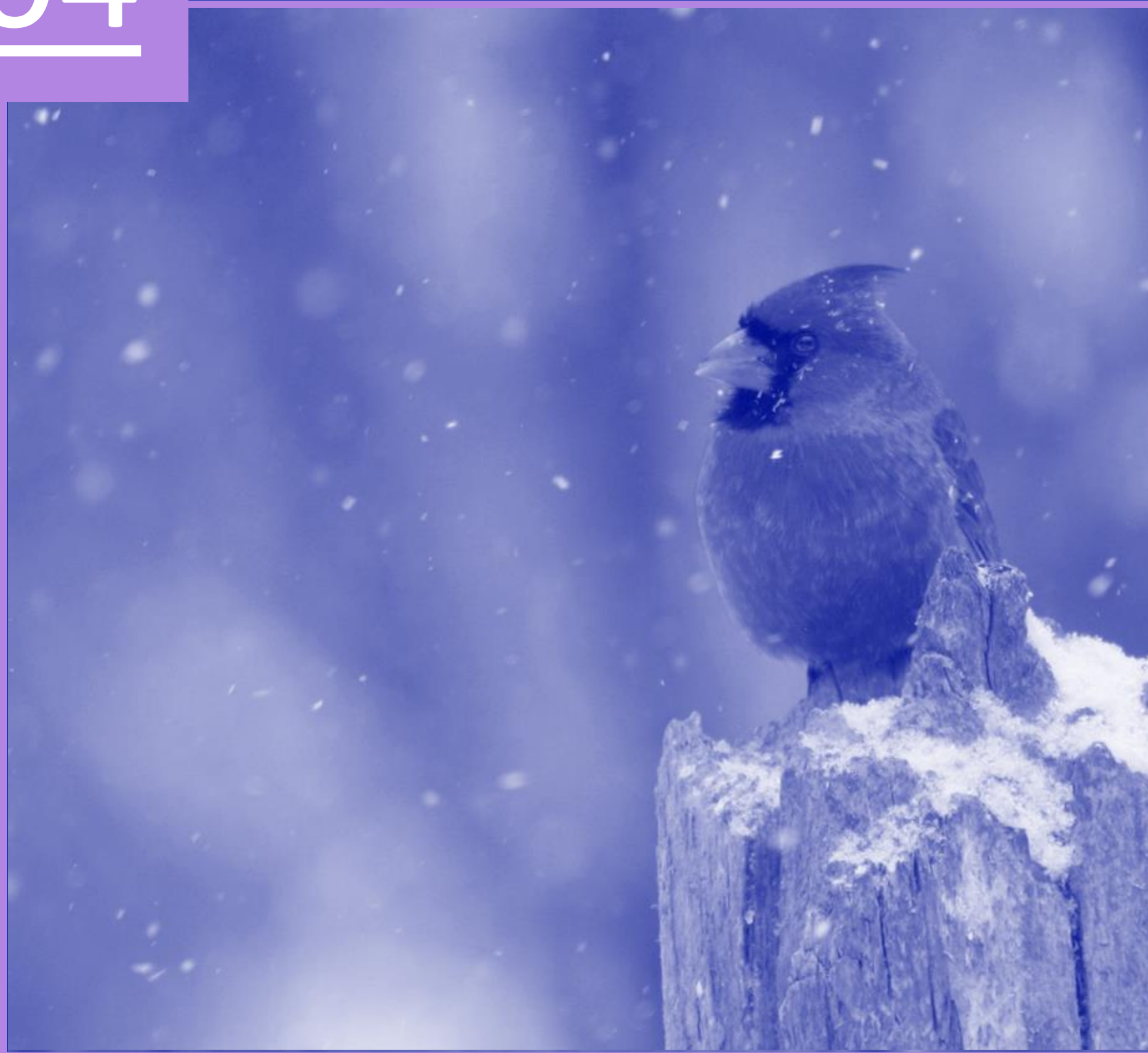


5 Steps to Correcting Discrepancies





04



Troubleshooting in **THE*benefits*HUB**



Your Go-To Troubleshooting Toolkit

THEbenefitsHUB Tools

- | | | |
|---|---|--|
|  Employee Eligibility Report |  IMNS Dashboard |  Enrollment History Report |
|  History File |  Demographic Pages |  Consolidated Enrollment Form |
|  Journal |  File Cabinet |  Manage Test Employees |

THEbenefitsHUB Reports

- | | | |
|---|--|--|
|  Plan Enrollment |  Login Statistics |  New Hire Email |
|  Monthly Billing |  Standard Payroll |  Plan Enrollment |
|  Census |  Monthly Billing |  Plan Comparison |
|  Add/Change/Term |  Plan Election Comparison |  Employee Eligibility |



05



THE*benefits*HUB Tools



Answering the Big ?'s

Tools to Help You Tackle Them All!



Journal Entry

Why did this change happen?



History file

What happened to my benefit?



Enrollment History Report

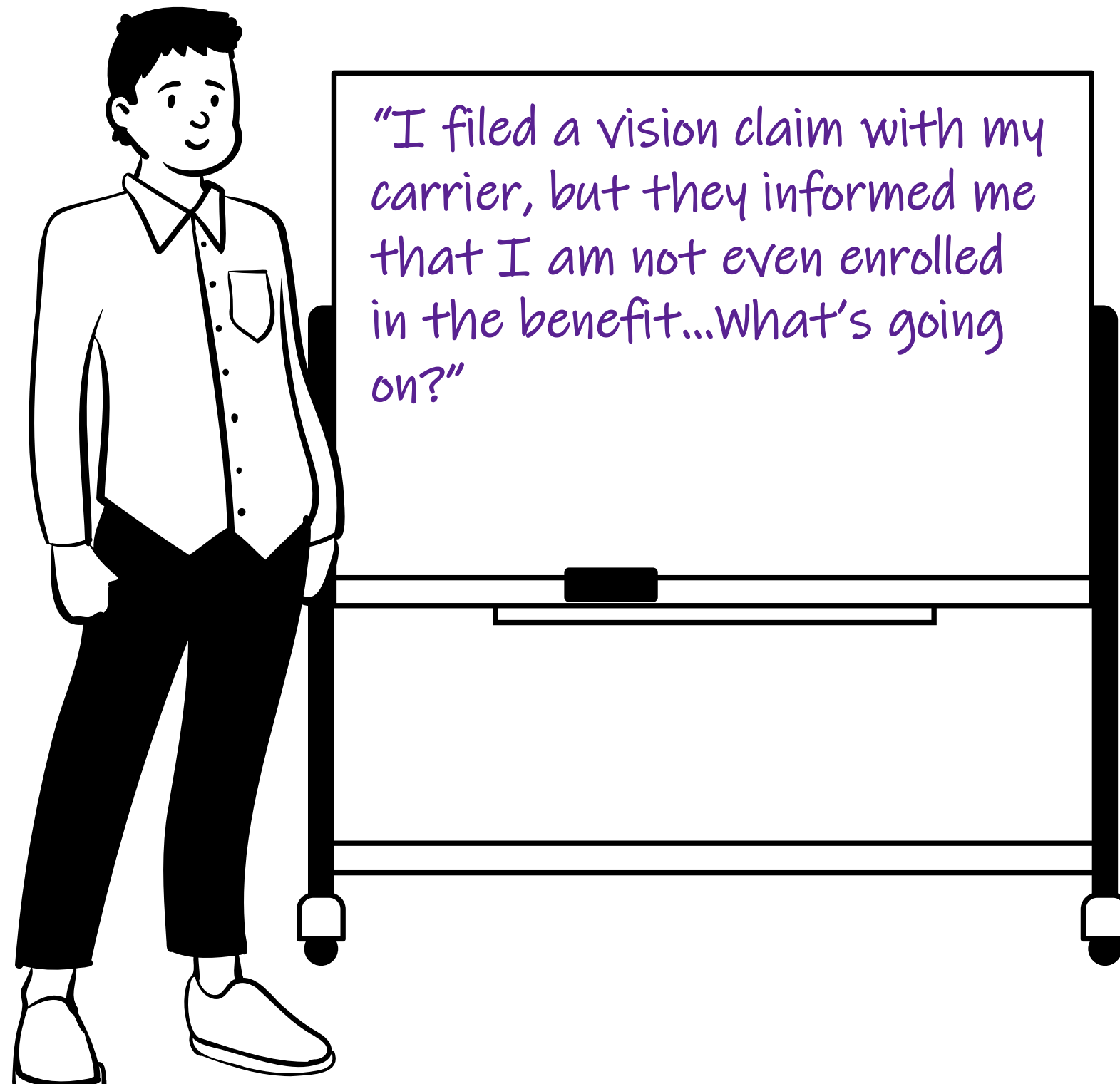
How did my benefits change?



Employee Eligibility Report

Why can't I enroll?







Employee: Jack Frost ▼ SSN: xxx-xx-0026 EE Enrollment Status: Complete Payroll ID: Show More ▼

EMPLOYEE ADMINISTRATION - FROST, JACK



Employee Information
^



Dependent Information
v



Benefit Plan Information
v

Profile
Emergency

Directory
New Hire Email
History File
Journal
Security Settings





Employee: Jack Frost ^

SSN: xxx-xx-0026

EE Enrollment Status: Complete

Payroll ID:

Show More v

Add Journal Entry

Change Employee

Copy to Clipboard



History

Select Date Range



02/01/2025



02/28/2026



Search

Results

Show

10



Activity By	Activity	
Olaf Admin "olaf.admin" Company Administrator	Frost, Jack - Employee Plan Enrollment Information edited by company administrator "olaf.admin" Frost, Jack - Vision was waived Coverage waived through qualifying event Non-Payment of Premium effective on 12/31/2025	02/10/2026, 04:06 PM CST IP 192.168.10.131
Alice Admin "alice.admin." Company Administrator	Frost, Jack - Employee Plan Enrollment Information edited by company administrator "alice.admin." Frost, Jack - Child(ren) Life [Child(ren) Life] [3326923] coverage provided by Global Insurance was added Coverage added through qualifying event **Benefits Administrator Correction with new coverage effective beginning 9/1/2025 Policy No. - Frost, Elsa (Child) coverage added Coverage = \$5,000.00 Employee Cost = \$1.00 (per month) Employer Cost = \$0.00 (per month) Unapproved Coverage = \$10,000.00 Employee Cost for Unapproved Coverage = \$2.00 (per month) The elected coverage of \$10,000.00 is greater than the maximum guaranteed issue/approved coverage of \$5,000.00 Frost, Ivy (Child) coverage added Show More	02/10/2026, 04:04 PM CST IP 192.168.10.131
Alice Admin "alice.admin." Company Administrator	Frost, Jack - Employee Plan Enrollment Information edited by company administrator "alice.admin." Frost, Jack - Employee Life [Employee Life] [3326911] coverage provided by Global Insurance was changed Coverage changed through qualifying event **Benefits Administrator Correction with new coverage effective beginning 9/1/2025	02/10/2026, 04:01 PM CST IP 192.168.10.131

Housekeeping

Today's
Presenters

Objectives

Researching vs.
Troubleshooting

Eligibility
Matters

Discerning
Discrepancies

Troubleshooting in
THEbenefitsHUB

THEbenefitsHUB
Tools

THEbenefitsHUB
Reports

Tips & Best
Practices

Wrap-Up



Logout, alice.admin.

ADMINISTRATION MENU > EMPLOYEE SEARCH > **EMPLOYEE MENU**

NEED HELP? | GIVE FEEDBACK

Employee: Jack Frost ▼

SSN: xxx-xx-0026

EE Enrollment Status: Complete

Payroll ID:

Show More ▼

EMPLOYEE ADMINISTRATION - FROST, JACK



Employee
Information



Dependent
Information



Benefit Plan
Information



Profile

Emergency

Directory

New Hire Email

History File

Journal

Security Settings





Logout, alice.admin.

ADMINISTRATION MENU > EMPLOYEE SEARCH > EMPLOYEE MENU >

NEED HELP? | GIVE FEEDBACK

Employee: Jack Frost ▼ SSN: xxx-xx-0026 EE Enrollment Status: Complete Payroll ID: Show More ▼

JOURNAL INFORMATION

Below is the list of journal entries. To view an entry, click the journal date or subject.

Please Note:

When inputting notes in the Journal Information of an employee, anything related to salary will be shown to all administrators whether they have limited or non-limited access. Enter salary related information at the employers' discretion.

Add Journal Entry

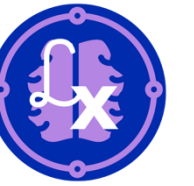


Journal Date	Subject	Category	Created By	File Uploaded
2/10/2026 @ 04:10:37	Non-Payment of Premium Received	Eligibility Change	[Company User] Olaf Admin	No

1 returned journal record

Print

Back



Employee: Jack Frost ▼

SSN: xxx-xx-0026

EE Enrollment Status: Complete

Payroll ID:

Show More ▼

EMPLOYEE ADMINISTRATION

Edit Journal Entry - 2/10/2026 at 4:10:37

Fields in bold are required.

Journal Date	2/10/2026	date in format, mm/dd/yyyy
Category	Eligibility Change	
Subject	Non-Payment of Premium Received	
Notes	Received notice from the carrier that Jack has not paid the premium since December 2025. Removed coverage effective 1/1/2026. 02/10/2026 Frost, Jack - Vision was waived Coverage waived through qualifying event Non-Payment of Premium effective on 12/31/2025	

Upload a Journal File

Choose File

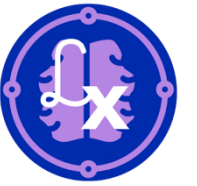
No file chosen

Add

☐ Click to continue adding entries

Save

Cancel





Logout, alice.admin.

ADMINISTRATION MENU > EMPLOYEE SEARCH > EMPLOYEE MENU

NEED HELP? | GIVE FEEDBACK

Employee: Jack Frost ▼

SSN: xxx-xx-0026

EE Enrollment Status: Complete

Payroll ID:

Show More ▼

EMPLOYEE ADMINISTRATION - FROST, JACK



Employee Information



Dependent Information



Benefit Plan Information



Benefit Plan Enrollment
Evidence of Insurability
Employee Eligibility Report
Enrollment History Report
Locked Election
Terminate Plan Elections

Beneficiary Information
Consolidated Enrollment Form

Acknowledgments
File Cabinet
Qualifying Life Event Requests [0 open]





Logout, alice.admin.

ADMINISTRATION MENU > EMPLOYEE SEARCH > EMPLOYEE MENU > ENROLLMENT HISTORY REPORT

NEED HELP? | GIVE FEEDBACK

Employee: Jack Frost ▾ SSN: xxx-xx-0026 EE Enrollment Status: Complete Payroll ID: Show More ▾

EMPLOYEE ADMINISTRATION

To view enrollment history for a specific plan type, select the plan type from the list below. To view enrollments within a specific date span, select the date span and click the select button.

Show History By Plan Type ▾

Show Plan Types Medical ▾ ☐ Show terminated elections

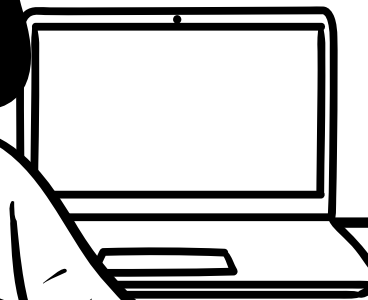
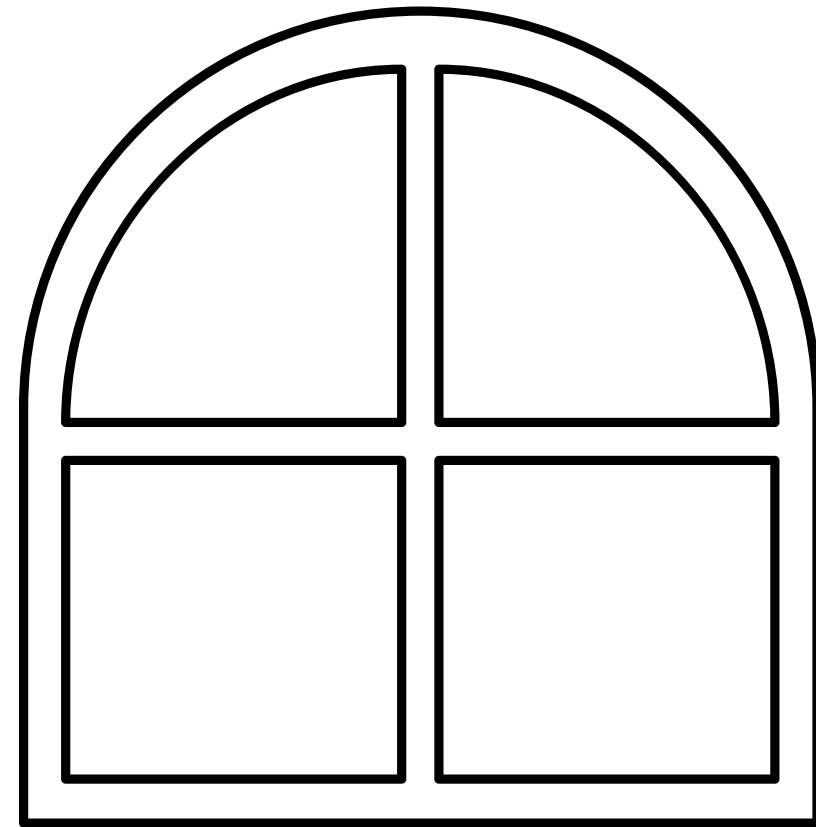
Show Date Span February ▾ 1 ▾ 2025 ▾ to February ▾ 28 ▾ 2026 ▾ Select

Below is the list of all enrolled plans of this plan type effective within the selected date span. Plan Types with a "*" have multiple policies. The Coverage listed are the total amounts of all policies.

Medical Plan Designs	Coverage	EE Cost Per Month	ER Cost Per Month	Effective Period	Date Elected	Date Terminated	Election Method	Election Created By
Medical - Option 2 [2025] [3326889]	Frost, Jack Frost, Holly Frost, Elsa Frost, Ivy	\$835.00	\$250.00	9/1/2025 - 12/31/2030	2/10/2026	- - -	Admin Elected	[Company User] Alice Admin

Print

Back



"How can I enroll my spouse
in the Spouse Life benefit
when it isn't visible to me?"





Logout, alice.admin.

ADMINISTRATION MENU > EMPLOYEE SEARCH > EMPLOYEE MENU

NEED HELP? | GIVE FEEDBACK

Employee: Jack Frost ▼

SSN: xxx-xx-0026

EE Enrollment Status: Complete

Payroll ID:

Show More ▼

EMPLOYEE ADMINISTRATION - FROST, JACK



Employee Information



Dependent Information



Benefit Plan Information



Benefit Plan Enrollment
Evidence of Insurability
Employee Eligibility Report
Enrollment History Report
Locked Election
Terminate Plan Elections

Beneficiary Information
Consolidated Enrollment Form

Acknowledgments
File Cabinet
Qualifying Life Event Requests [0 open]





Logout, alice.admin.

ADMINISTRATION MENU > EMPLOYEE SEARCH > EMPLOYEE MENU > EMPLOYEE ELIGIBILITY REPORT

NEED HELP? | GIVE FEEDBACK

Employee: Jack Frost ▾ SSN: xxx-xx-0026 EE Enrollment Status: Complete Payroll ID: Show More ▾

EMPLOYEE ADMINISTRATION

To view plan eligibility for a specific plan type, select the plan type from the list below. To view only eligible or ineligible plans, check only the corresponding box.



Spouse Life ▾

☒ Show eligible plans

☒ Show ineligible plans

☐ Show open enrollment plans only

Benefit Plan Design	Effective Period	Eligibility Date	Election Exists	Currently Enrolled	Currently Eligible	Reason Ineligible
Spouse Life - Spouse Life - [2025] [3326917]	1/1/2021 to 12/31/2030	9/1/2025	No	No	No	The following demographic eligibility requirements are not fully met: Value for field "Is your spouse currently age 65 or older?" must equal "No"
Spouse Life - Spouse Life - [2025] [3326918]	1/1/2021 to 12/31/2030	3/1/2025	No	No	No	Required contingent enrollment does not exist. The following demographic eligibility requirements are not fully met: Value for field "Is your spouse currently age 65 or older?" must equal "No"
Spouse Life - Spouse Life - [2025] 65+ [3326919]	1/1/2021 to 12/31/2030	9/1/2025	No	No	No	The following demographic eligibility requirements are not fully met: Value for field "Is your spouse currently age 65 or older?" must equal "Yes" AND Value for field "Previously Enrolled:" must not contain "Spouse Life"
Spouse Life - Spouse Life - [2025] 65+ [3326920]	1/1/2021 to 12/31/2030	3/1/2025	No	No	No	Required contingent enrollment does not exist. The following demographic eligibility requirements are not fully met: Value for field "Is your spouse currently age 65 or older?" must equal "Yes" AND Value for field "Previously Enrolled:" must not contain "Spouse Life"
Spouse Life - Spouse Life - [2025] Previously Enrolled 65+ [3326921]	1/1/2021 to 12/31/2030	9/1/2025	No	No	No	The following demographic eligibility requirements are not fully met: Value for field "Is your spouse currently age 65 or older?" must equal "Yes" AND Value for field "Previously Enrolled:" must contain "Spouse Life"
Spouse Life - Spouse Life - [2025] Previously Enrolled 65+ [3326922]	1/1/2021 to 12/31/2030	3/1/2025	No	No	No	Required contingent enrollment does not exist. The following demographic eligibility requirements are not fully met: Value for field "Is your spouse currently age 65 or older?" must equal "Yes" AND Value for field "Previously Enrolled:" must contain "Spouse Life"





06



THE*benefits*HUB Reports



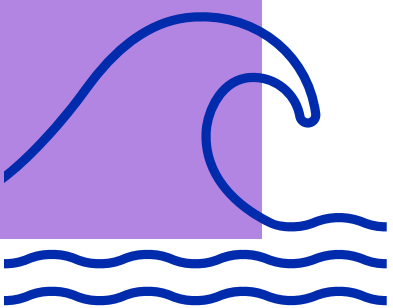
Employee Eligibility Report

Employee vs Employees



Employee-Level Report

Troubleshooting when an individual employee is not eligible for a certain plan(s).



Company-Level Report

Comparing eligibility across multiple employees, divisions, or employee categories.



Answering the Big ?'s

Reports to aid Research!



Quick Reports

Login Statistics – Who has logged in?

Standard Payroll – Who has enrolled?

Monthly Billing – Who has enrolled?

Plan Election Comparison – What has changed?

New Hire Email – Who is new?



Standard Reports

Plan Enrollment – Who has enrolled?

Plan Comparison – What has changed?

Employee Eligibility – Who is eligible?

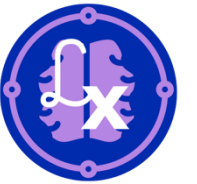




07

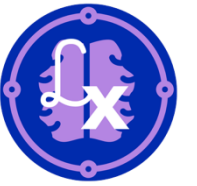


Tips & Best Practices



Time to Troubleshoot:

If you are spending more than
5 minutes troubleshooting something,
please reach out to your **Account
Representative** to lend a helping hand!



Troubleshooting Best Practices

Do:



Check the IMNS Dashboard



Review Manual Additions

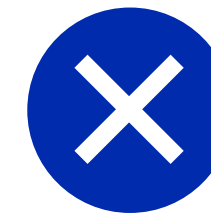


Question Eligibility

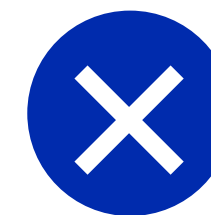
Don't:



Ignore Reports



Risk Terminations



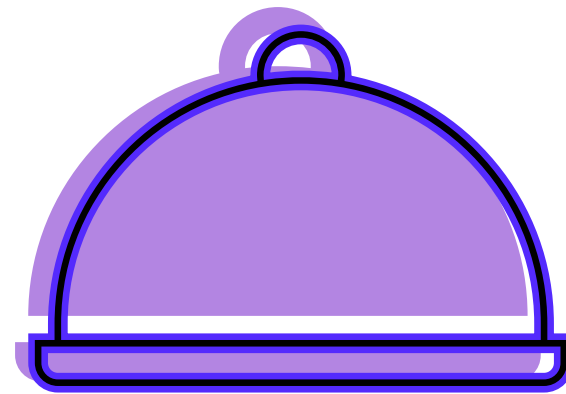
Practice On Employees



Reporting Tips



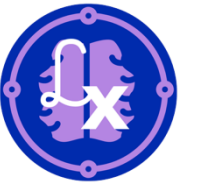
No Scare Zone



Covered Up



Useful Tools



Feeling Stuck?

If you are ever **unsure** of **where** to **start**
in the Employee Administration when
correcting an **error** – use the **Employee**
Eligibility Report!



08

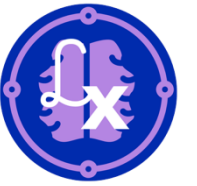


Wrap-Up

“

Aspen is eligible for Basic Life coverage, but when she goes to elect it there isn't an amount populating in the dropdown!

”



Thank you for attending!

Need more help?

Contact us with any questions at learn@allsynx.com