

**PEIA Web Contributions
User Manual**

Note: This manual is provided to all agencies, state and non-state. Because there are differences between how the agency types will be using the system, the following color coding is used throughout this manual to denote items that are type specific:

State Agencies	Blue
Non-State Agencies	Green
County Board of Education	Orange

This manual will be updated as new features become available, after the associated help page is created.

This manual is current as of: March 3, 2008

Home Page for Web Contributions

Logged on as: OLIVIA WALTON
logout

WEST VIRGINIA
Public Employees Insurance Agency

Home

PEIA Retirement Trust

Home | Employee Deductions | Monthly Contributions | Premium Accounts

Billing : PEIA
Agency : OAK HILL, CITY OF - Select

Help

Web Contributions Site for PEIA

PEIA Web Contributions "Go Live" date is March 1st 2008 and the training begins from February 14th 2008.

Site Contact: **Tammy Haynes**
Return to **PEIA Open Enrollment**
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1. Logged in user's name and Logout button
2. Buttons to switch between PEIA & Retirement Trust (RHBT)
3. Menu Bar
 - a. Home - Home Page
 - b. Employee Deductions – Searchable list of employees, allows you to view invoices, change remittances, and submit coverage terminations
 - c. Monthly Contributions – Your bill, online. View total bill, submit payment via LOCKBOX (**non-state agencies**) and IGT (**state agencies**), with ACH coming soon.
 - d. Premium Accounts (**state agencies ONLY**)
4. The Notifications Area is used by PEIA to alert you of important website events. For example, this space would be used to denote scheduled downtime or new features.

How to Use the Site

Step 1 – View Your Bill Summary

Logged on as: OLIVIA WALTON
logout

WEST VIRGINIA Monthly Contributions
Public Employees Insurance Agency PEIA Retirement Trust

Home | Employee Deductions | Monthly Contributions | Premium Accounts

Billing: PEIA
Agency: OAK HILL, CITY OF - Select

Printer Friendly Help

Monthly Contributions for 12-2007

Invoiced Amount	\$ 21922.63
Remittance Amount	\$ 21908.62
Remaining Balance	\$ 14.01

Comments (will be displayed on the Payment Sheet submitted with your check.)

Processing Type: LOCKBOX Processing to Start With: DEC 2007

Update Period Submit Payment

Site Contact: Tammy Haynes
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- View your bill total by clicking "[Monthly Contributions](#)" and making sure the month you wish to view is selected under "Processing to Start with" in the bottom right.
- Please note that you have two bills now, one owed to PEIA and one owed to RHBT (OPEB-Retirement Trust). Use the buttons on the top right of your screen to switch between these two different billings. If you add both the PEIA total and the RHBT (OPEB-Retirement Trust) total, **these will equal what you see on your payroll withholdings.**
 - If there is a discrepancy in the amounts OR if you wish to perform another function such as changing a remittance amount, viewing policy holder's detail, or terminating coverage, proceed to [Step 2](#).
 - If there is not a discrepancy and you have no other actions to take on the site, you can submit your Monthly Contributions (proceed to [Step 3](#)).

Step 2 – View Your Itemized Bill

The screenshot shows the PEIA website interface. At the top, it says "Logged on as: ALVIRA DRUMMOND" with a "logout" link. The main header includes the West Virginia logo and "WEST VIRGINIA Public Employees Insurance Agency". Below this is a navigation bar with links for "Home", "Employee Deductions", "Monthly Contributions", and "Premium Accounts". The current page is "Search Results".

Search filters include:

- Billing: PEIA
- Agency: WV DEVELOPMENT OFFICE - Select
- Employee SSN: [input field]
- Employee Last Name: [input field]
- Processing Period: FEB 2008
- Results Per Page: 50
- Search button

Search Results: 91 Employee(s) Found Page 1 2

<u>SSN</u>	<u>Name</u> ↑	<u>Active</u>	<u>Current Period (Premiums & Fees)</u>	<u>Current Month Payment Received</u>	<u>Total Due Previous Statement</u>	<u>Total Balance Due</u>	<u>Current Remittance</u>	<u>Outstanding Balance</u>
999999913	AARDVARK, ANITA L	Active	\$ 0.00	\$ 838.38	\$ 1676.76	\$ 838.38	\$ 838.38	\$ 0.00
999999907	ARBUCKLE, JON R	Active	\$ 0.00	\$ 346.38	\$ 692.76	\$ 346.38	\$ 346.38	\$ 0.00
999999902	BAXTER, TED J	Active	\$ 0.00	\$ 44.44	\$ 88.88	\$ 44.44	\$ 44.44	\$ 0.00

- Access the “[Employee Deductions](#)” link to view your itemized bill or make changes to an individual employee.
- If you are with a **County Board of Education: we will be loading your payroll from RESA files (this is the same thing CPRB currently does). Once the payroll files are loaded, we will generate a page to show you the differences so you can quickly identify and resolve any discrepancies.**
- If you are with a **State Agency, when the EPICS run is completed at the middle and end of the month, you will see “\$0.00” as the current remittance unless there is a discrepancy.**
- Use the search box to locate individual employees, or search by a date range to bring up all employees. The underlined columns are can be sorted in ascending or descending order by clicking the column name and the arrow that appears next to the sorted column.
- UPCOMING FEATURE: We anticipate adding a downloadable Microsoft Excel Export to this data in the near future. An exact release date is not available at this time, but it is something we are placing with High Priority.
- To change an employee’s remittance amount, view detail, or terminate an employee, click the linked social security number to access the Employee Profile Page.

Step 2a – The Employee Profile Page

Logged on as: OLIVIA WALTON
logout

WEST VIRGINIA
Public Employees Insurance Agency

Employee Profile

PEIA Retirement Trust

Home | Employee Deductions | Monthly Contributions | Premium Accounts

Billing: PEIA
Agency: OAK HILL, CITY OF - Select

Employee ID:	000097198	SSN:	99999997
First Name:	MICKEY	DOB:	10/23/1964
Middle Initial:	A		
Last Name:	MOUSE		

Employer Premiums

Title: Basic Life

Details:
Employee Rate Type (Type): N
Health Tier of Coverage: P
I Type: Active
Tobacco Status: B
Region: 02
Medicare: FALSE
Disability: FALSE
Legislature: FALSE
ESPS: FALSE
Coverage Effective Date: 2002-07-01

Invoiced:	\$ 5.37
Received:	\$ 0.00
Past Balance:	\$ 0.00
Current Balance:	\$ 5.37
Remittance:	\$ 5.37 Change Amount
New Balance:	\$ 0.00

Title: Health Premiums - Employer

Details:
Employee Rate Type (Type): N
Health Tier of Coverage: P
I Type: Active
Tobacco Status: B
Region: 02
Medicare: FALSE
Disability: FALSE
Legislature: FALSE
ESPS: FALSE
Coverage Effective Date: 2002-07-01

Invoiced:	\$ 214.01
Received:	\$ 0.00
Past Balance:	\$ 0.00
Current Balance:	\$ 214.01
Remittance:	\$ 214.01 Change Amount
New Balance:	\$ 0.00

Terminate Employee

Termination Reason: DELETED
if deceased, date of death: / / 2007

Termination Date: JAN / 31 / 2007

Payment History | Finished

Site Contact: Tammy Haynes
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- Details about the Employee are included at the top of the page
- The page is split into two parts – “Employer Premiums” (e.g. Basic Life, Health Premiums – Employer) and “Policy Holder Premiums” (Optional Life, Health Premiums – Employee)
- The “**Invoiced:**” and “**Past Balance:**” amounts are clickable, so you can drilldown to see which invoices comprise that amount.
- You can change a remittance amount by clicking the “**Change Amount**” link. (Please see **Step 2b** for more information on this.)
- Terminations can be done by using the form at the bottom of the page. (Please see **Step 2c** for more information on this.)

Step 2b – Changing A Remittance Amount

- You can change a remittance amount by clicking the **“Change Amount”** link next to the remittance amount you wish to change.

WEST VIRGINIA
Public Employees Insurance Agency

Logged on as: CLYDE VVALTON
Logout

PEIA Retirement Trust

Home | Employee Deductions | Monthly Contributions | Premium Accounts

Billing: PEIA
Agency: OAR-HLL, CITY OF

Help

Warning: If you change the remittance amount to an amount different than the PEIA billing, PEIA must receive a properly approved eligibility transaction within 60 days in order for this change to be accepted by PEIA. Otherwise, the billed amount shall remain in effect.

Title:	Health Premiums - Employer
Employee Rate Type (Type):	N
Health Tier of Coverage:	P
Type:	Active
Tobacco Status:	0
Region:	02
Medicare:	FALSE
Disability:	FALSE
Legislature:	FALSE
ESPS:	FALSE
Coverage Effective Date:	2002-07-01
Invoiced:	\$ 214.01
Received:	\$ 0.00
Past Balance:	\$ 0.00
Current Balance:	\$ 214.01

Remittance Amount: 200.00

Remittance Reason: Generic Reason

Save Changes Cancel

Site Contact: Tammy Hughes
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- Please note the warning at the top of the page. Any remittance changes must also have a properly approved eligibility transaction within 60 days for the change to be permanent.

Step 2c – Terminations

- Terminations are done using the form at the bottom of the Employee Profile page.
- If you use this form to perform the termination, you will not need to submit additional paperwork to PEIA.
- Dependant on the reason code given, PEIA will send the COBRA notifications as applicable.

Step 3 – Viewing Your Bill Summary (PEIA)

Logged on as: OLIVIA WALTON
logout

WEST VIRGINIA Monthly Contributions
Public Employees Insurance Agency PEIA Retirement Trust

Home | Employee Deductions | Monthly Contributions | Premium Accounts

Billing : PEIA
Agency: OAK HILL, CITY OF - Select

Printer Friendly Help

Monthly Contributions for 12-2007

Invoiced Amount	\$ 21922.63
Remittance Amount	\$ 21908.62
Remaining Balance	\$ 14.01

Comments (will be displayed on the Payment Sheet submitted with your check.)

Processing Type: LOCKBOX Processing to Start With: DEC 2007

Update Period Submit Payment

Site Contact: Tammy Haynes
Return to PEIA Open Enrollment
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- Use the “**Monthly Contributions**” link to access your Bill Summary or to submit your contribution.
- Change the “Processing to Start with” to the month you used to view.
- The “Comments” section can be used if you are submitting an overpayment due to a new employee that has not been entered yet. You would use the comments to put in the name of the new employee.
(Please note that

you must still submit the new hire form.)

- **State Agencies will use “IGT” as the Processing Type. You will still need to produce the IGT.**
- **Non-State Agencies will use “LOCKBOX” as the Processing Type.**
- Once you are ready to submit your payment, click “Submit Payment.” Please note that this may take a few minutes to be completed.

Step 4 – Submission Process (PEIA)

WEST VIRGINIA
IGT Success

Public Employees Insurance Agency

PEIA
Retirement Trust

Home
Employee Deductions
Monthly Contributions
Premium Accounts

Billing : PEIA
Agency : WV DEVELOPMENT OFFICE - Select

Help

PEIA Payment Coupon

Date	02/29/2008
Invoice Amount	\$ 39751.91
Remittance Amount	\$ 39242.90
Remaining Balance	\$ 509.01

If you change the remittance amount to an amount different than the PEIA billing, PEIA must receive a properly approved eligibility transaction within 60 days in order for this change to be accepted by PEIA. Otherwise, the billed amount shall remain in effect.

Employee	Coverage Period	Coverage Type	Billing Amount	Remittance
STIVIC, MEATHEAD	112007	HEALTHPREMIUM_EMPLOYER	\$ 1018.02	\$ 0.00

Print Out Coupon for your Records
[Click here if you have to make your Retirement Trust Payment](#)
Next Step: Enter Batch & FIMS Number

- Please note that if you have made any remittance changes, these will need a properly approved eligibility transaction within 60 days to remain permanent. This warning and a list of the changes you have made will be listed on this page.
- **For State Agencies: Print Out Coupon for Your Records – Please print the linked page. The number in the bottom right is your Batch Number. It is necessary to enter your FIMS information into the system (Step 5).**
- **For Non-State Agencies: Print Out Coupon for Mailing – the linked file will need to be printed and submitted with your check.**
- Reminder link – “Click here if you have to make your Retirement Trust Payment.” You must make both payments on a monthly basis. This link is provided as a reminder that you need to do both.
- **For State Agencies: Next Step: Enter Batch & FIMS Number. Use this link to access the form to enter the FIMS number after you have used FIMS to enter this deposit. You can also access this page by using the “Premium Accounts” link at the top of the page.**

State Agencies continue to Step 5 | Non-State Agencies skip to Step 6

Step 5 – Entering the Batch & FIMS number: State Agencies

The screenshot shows the PEIA website interface. At the top right, it says "Logged on as: OLIVIA WALTON" with a "logout" link. Below that is a "PEIA Retirement Trust" button. The main header features the "WEST VIRGINIA" logo and "Public Employees Insurance Agency". A navigation bar includes "Home", "Employee Deductions", "Monthly Contributions", and "Premium Accounts". The main content area displays "Billing: PEIA" and "Agency: OAK HILL, CITY OF". The central heading is "Enter Batch & FIMS Number". Below this are three input fields: "Batch Number:", "Deposit Total:", and "FIMS Number:". At the bottom of the form are two buttons: "Save Changes" (with a green checkmark icon) and "Cancel" (with a red X icon). At the very bottom, there is contact information: "Site Contact: Tammy Haynes", "Return to PEIA Open Enrollment", "Need Help?", and "Copyright © 2008".

- **The Batch Number is obtained from the bottom right of the Payment Coupon.**
- **Enter the FIMS number (received within FIMS)**

Proceed to Step 6

Step 6 – Monthly Contributions for the Retirement Trust/OPEB

WEST VIRGINIA		Monthly Contributions	
Public Employees Insurance Agency		PEIA	Retirement Trust
Home Employee Deductions Monthly Contributions Premium Accounts			
Billing : Retirement Trust Agency : WV DEVELOPMENT OFFICE - Select		Printer Friendly	Help
Monthly Contributions for 12-2007			
Invoiced Amount	\$ 19749.28		
Remittance Amount	\$ 19749.28	Remaining ARC (not included) : \$ 8787.84	
Remaining Balance	\$ 0.00		
Comments (will be displayed on the Payment Sheet submitted with your check.) <div style="border: 1px solid black; height: 40px; width: 100%;"></div>			
Processing Type:	LOCKBOX	Processing to Start With:	DEC 2007
Update Period		Include ARC	
Submit Payment			

- The Optional Remaining ARC is NOT INCLUDED by default. You can include this amount into your payment by clicking the "Include ARC" button. If you click this button in error, you can remove the ARC by clicking the button again (the text will change on the button to reflect this.)
- Change the "Processing to Start with" to the month you used to view.
- The "Comments" section can be used if you are submitting an overpayment due to a new employee that has not been entered yet. You would use the comments to put in the name of the new employee. *(Please note that you must still submit the new hire form.)*
- **State Agencies will use "IGT" as the Processing Type. You will still need to produce the IGT.**
- **Non-State Agencies will use "LOCKBOX" as the Processing Type.**
- Once you are ready to submit your payment, click "Submit Payment." Please note that this may take a few minutes to be completed.

Step 7 – Submission Process (OPEB)

Public Employees Insurance Agency		PEIA	Retirement Trust
Home Employee Deductions Monthly Contributions Premium Accounts			
Billing : Retirement Trust		<input type="button" value="Help"/>	
Agency : WV DEVELOPMENT OFFICE - Select			
OPEB Payment Coupon			
Date	02/29/2008		
Invoice Amount	\$ 19749.28		
Remittance Amount	\$ 19749.28		
Remaining Balance	\$ 0.00		
<p>Print Out Coupon for your Records Click here if you have to make your PEIA Payment Next Step: Enter Batch & FIMS Number</p>			

- Please note that if you have made any remittance changes, these will need a properly approved eligibility transaction within 60 days to remain permanent. This warning and a list of the changes you have made will be listed on this page.
- **For State Agencies: Print Out Coupon for Your Records – Please print the linked page. The number in the bottom right is your Batch Number. It is necessary to enter your FIMS information into the system (Step 5).**
- **For Non-State Agencies: Print Out Coupon for Mailing – the linked file will need to be printed and submitted with your check.**
- Reminder link – “Click here if you have to make your PEIA Trust Payment.” You must make both payments on a monthly basis. This link is provided as a reminder that you need to do both.
- **For State Agencies: Next Step: Enter Batch & FIMS Number. Use this link to access the form to enter the FIMS number after you have used FIMS to enter this deposit. You can also access this page by using the “Premium Accounts” link at the top of the page.**

State Agencies continue to Step 5 to submit the FIMS number for the Retirement Trust payment.

For all agencies, if you have completed through sending payment to both PEIA and RHBT (OPEB), either via IGT or LOCKBOX, you are completed with all tasks on this site for the month.