

Reconciliation		Reconciliation	
DETAILS	Processing		
Group:			
Carrier:			
Group carrier ID:			
Group connection ID:			
Created:		Q Search ID, employee name, or group name	
DETAILS	Completed	STATUS  CARRIER GROUP	
Group:			
Carrier:			
Group carrier ID:		Needs review	
Group connection ID:			
Created:			
		Processing	
DETAILS	Action required		
Group:			

A GUIDE FOR BENEFITS SOFTWARE, BEN-ADMIN PLATFORMS, AND HR SOLUTIONS

# Protect your members from unexpected coverage issues

## Easily identify and resolve issues during ongoing maintenance to prevent disruptions to coverage.

- ✓ Ditch complex error reports for Noyo's simple and intuitive interface
- Resolve issues with one click instead of endless calls and emails
- Cut through the noise with built-in prioritization of the most serious issues

## About the Reconciliation experience

Review and resolve data mismatch issues that can impact a member's coverage with Noyo's intuitive tool. Issues are surfaced on an ongoing basis for any group that is successfully connected to a Sync carrier.

The Reconciliation tool is accessed through your Noyo dashboard, which is available to all benefits software partners (stay tuned for future releases of Reconciliation over API). If you need it, dashboard access can be granted by your organization's Noyo admin.

#### Step 1: Connect a group

<u>After a group is successfully connected through Noyo</u>, we begin periodically retrieving data refreshes from the carrier's system (this refresh cadence varies by group). This enables Noyo to compare changes received from the platform to the state of the carrier's data and identify potential mismatches.

#### Step 2: Noyo sends alert for new issues

Noyo sends an email alert within one business day of identifying an issue, but up-to-date issues can be viewed at any time by logging into the Reconciliation tool in the dashboard.

Noyo ensures that you only see important issues that could disrupt a member's coverage, prevent management of enrollment through Noyo, or impede access to care:

- Employees who are unexpected or missing
- Dependents who are unexpected or missing
- Individual enrollments that are unexpected or missing
- Date of birth mismatch
- Social security number mismatch
- Member account structure mismatch

For issues outside of these categories, like an incorrect house number or termination date, Noyo will not automatically flag a mismatch that occurs after the initial round-trip confirmation of the change is done (for instance, if a change is made directly with the carrier weeks after the Noyo transaction is complete). Platforms can always **GET** the state of a member or coverage from the Noyo API to check what the carrier has on file, and send a new member request to make any additional changes.

### Continued $\rightarrow$

#### Step 3: Platform gives input on resolution

Log into the Noyo dashboard and select the Reconciliation tool from the left-hand panel. Noyo always attempts to resolve issues first, but when the platform's input is required, the issue will appear in the Reconciliation tool.

Filter by status to see all the issues that need review.

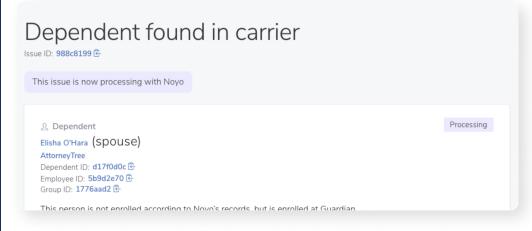
y action Noyo shou	riers to identify	potential data mis	smatches, which are	e surfaced h	ere. Please review th	hese open issue	es and indicate
ARCH Search ID, person name, or group name		FILTER BY STATUS		All statuses All transmission of the status		All types 👻	
STATUS 🗘	CARRIER	GROUP	PERSON	LOC	All statuses All active items	DISCOV	ERED 🗘
Processing	Guardian	AttorneyTree	Merrilee Hayes	Vision	Needs review Processing	e 2021- h 9:42 A	01-06 M EST
Processing	Guardian	AttorneyTree	Jeffery Zieme	Dental		ent 2021- er 9:42 A	01-06 M EST
Processing	Guardian	AttorneyTree	Zackary Swift	Vision	Individual enrollme found in carrier	ent 2021- 9:42 A	
Processing	Guardian	AttorneyTree	Jerrell Fadel	Vision	Individual enrollme missing from carrie		

To give input on an issue, simply choose the correct option and submit it to Noyo. You can also add notes to give our team further context on an issue if needed.

Dependent missing fror	n carrier			
Dependent     Adam Runolfsdottir (Child)     AttorneyTree     Dependent ID: c137dd17       Employee ID: 4bc77b9d      Group ID: 1776aad2      This person is enrolled according to Noyo's records, but is r	Needs review			
Noyo: Verified with carrier Select the option that reflects the resolution to this conflict				
O Enrolled	O Not enrolled			
Update at Guardian	Guardian			
O Something else	O Dismiss issue			
You'll be prompted to explain more below	This issue does not need to be resolved			

#### Step 4: We'll take care of it!

Once input is submitted, the status of the issue will move to "Processing" as the Noyo team works to resolve it. You can check an issue's status at any time in the dashboard.



In most cases, Noyo is able to resolve issues by communicating directly with the carrier, but some issues may require the platform to send member transactions to alter someone's coverage (this will be indicated in the tool).

In cases where the platform's input does not resolve the issue, a member of the Noyo team will reach out to the platform with further information.

Issues that have been successfully addressed will be marked with a "Resolved" status and the issue will be closed.