



## Reconciliation

# Reconciliation

DETAILS

Processing

Group:

Carrier:

Group carrier ID:

Group connection ID:

Created:

🔍 Search ID, employee name, or group name

DETAILS

Completed

Group:

Carrier:

Group carrier ID:

Group connection ID:

Created:

STATUS ▾

CARRIER

GROUP

Needs review

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

[After a group is successfully connected through Noyo](#), 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](#) →

### 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.

**Reconciliation**

Noyo syncs with carriers to identify potential data mismatches, which are surfaced here. Please review these open issues and indicate any action Noyo should take to resolve them.

SEARCH: Search ID, person name, or group name

FILTER BY STATUS: All statuses (dropdown) FILTER BY TYPE: All types (dropdown)

STATUS	CARRIER	GROUP	PERSON	LOC	DISCOVERED
Processing	Guardian	AttorneyTree	Merrilee Hayes	Vision	2021-01-06 9:42 AM EST
Processing	Guardian	AttorneyTree	Jeffery Zieme	Dental	2021-01-06 9:42 AM EST
Processing	Guardian	AttorneyTree	Zackary Swift	Vision	Individual enrollment found in carrier 2021-01-06 9:42 AM EST
Processing	Guardian	AttorneyTree	Jerrell Fadel	Vision	Individual enrollment missing from carrier 2021-01-06 9:42 AM EST

Dropdown menu options: All statuses, All active items, Needs review, Processing, All closed items, Resolved

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 from carrier**

Issue ID: 5deba1af

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 not enrolled at Guardian.

Noyo: Verified with carrier

Select the option that reflects the resolution to this conflict.

- Enrolled  
Update at Guardian
- Not enrolled  
Guardian
- Something else  
You'll be prompted to explain more below
- Dismiss issue  
This issue does not need to be resolved

Needs review

Continued →

#### 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.

## Dependent found in carrier

Issue ID: [988c8199](#)

This issue is now processing with Noyo

 Dependent

**Elisha O'Hara (spouse)**

AttorneyTree

Dependent ID: [d17f0d0c](#)

Employee ID: [5b9d2e70](#)

Group ID: [1776aad2](#)

Processing

This person is not enrolled according to Noyo's records, but is enrolled at Guardian

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.