

How to Use the EBS Forms

Definitions:

Agency – An Agency is any employer, also known as a Participating Entity, that participates in PEBA Insurance Benefits' programs.

Authorizing Agent – An Authorizing Agent may be a human resources, benefits, or operations employee, who has been given the authority to manage the Agency's individual employee access to PEBA Insurance Benefits' systems. An Authorizing Agent is often a Benefits Administrator.

Designated Employee – A Designated Employee is a Benefits Administrator directly employed with the Agency, or an employee of a Third-Party Enroller, who needs to have access to PEBA Insurance Benefits' systems.

Director or CEO – A Director or CEO is the highest ranking individual at an Agency and is in charge of the Agency's operations. This person has authority to enter into contracts on behalf of the Agency. Your Agency may have a different title for this individual.

IT Manager – An IT Manager is the individual responsible for ensuring the minimum technological requirements for use of EBS are met. This individual may be employed in the Information Technology department or other similar department and manages installation, updates, and maintenance of the Agency's software, computers, and other electronic devices.

Third-Party Enroller or TPE – A Third-Party Enroller or TPE is an outside company that an Agency hires to provide subscriber enrollment services. This is NOT an employer that directly participates in PEBA Insurance Benefits' programs.

Instructions for Benefits Administrator Access:

- **STEP 1** – Complete the Agency Confidentiality Agreement.
 - This form must be completed once each year no later than June 30.
 - This form should be signed by the Agency's *Director or CEO* and the Agency's *IT Manager*.
- **STEP 2** – Complete the Authorizing Agent Designation Form.
 - This form must be completed any time the Authorizing Agent changes, and is then kept on file with PEBA Insurance Benefits.
 - This form should be signed by the Agency's *Director or CEO*.
- **STEP 3** – Complete the Designated Employee Confidentiality Agreement.
 - This form must be completed for each employee who needs access to EBS, individually.
 - This form should be signed by both the *employee* who needs access to EBS and the *Authorizing Agent*.

Instructions for Third-Party Enroller Access:

- **STEP 1** – Complete **STEPS 1 and 2 of the Instructions for Benefits Administrator Access** above.
- **STEP 2** – Complete the Memorandum of Understanding.
 - This form must be completed once each year no later than June 30.
 - This form should be signed by the *Third-Party Enroller's Director or CEO*.
- **STEP 3** – Complete the TPE Designated Employee Confidentiality Agreement.
 - This form must be completed for each employee of the TPE who needs access to EBS, individually.
 - This form should be signed by both the *employee of the TPE* who needs access to EBS and the Agency's *Authorizing Agent*.