



How to Setup MyChoice Mobile App

Overview and Setup Instructions

Document Summary

The MyChoice Mobile App is an inherent part of Benefitsolver and included as part of the Core PEPM for all clients. Use this document to learn how to add the MyChoice Mobile App to any client's service.

Version: 1.8 | **Last Updated:** 7/29/2021 by jwilliams

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System Areas Impacted

(Check all that apply)

<input checked="" type="checkbox"/> Company ←	<input checked="" type="checkbox"/> Benefits←	<input type="checkbox"/> Employees←	<input type="checkbox"/> Administration←	<input type="checkbox"/> Reports←
<input type="checkbox"/> Company Information	<input checked="" type="checkbox"/> Vendor Set-Up	<input type="checkbox"/> Add Employee	<input type="checkbox"/> Administration Groups	<input type="checkbox"/> Report Dashboard
<input checked="" type="checkbox"/> Company Access	<input type="checkbox"/> Plan Info	<input type="checkbox"/> Search Employees	<input type="checkbox"/> Add Administrator	<input type="checkbox"/> Standard Reports
<input checked="" type="checkbox"/> Company Structure	<input type="checkbox"/> Plan Mapper	<input type="checkbox"/> Pending Changes	<input type="checkbox"/> Edit Administrator	<input type="checkbox"/> Custom Reports
<input type="checkbox"/> Structure Groups	<input type="checkbox"/> Plan Pricing Update	<input type="checkbox"/> Create Documents	<input type="checkbox"/> Logs	<input type="checkbox"/> Build a Report
<input type="checkbox"/> Rules Builder	<input type="checkbox"/> Express Plan Update	<input type="checkbox"/> Search Documents	<input type="checkbox"/> Case Manager	<input type="checkbox"/> Scheduled Reports
<input type="checkbox"/> Formula Builder	<input type="checkbox"/> ASO Fees	<input type="checkbox"/> Print Queues	<input type="checkbox"/> Reference Center	<input type="checkbox"/> Submitted Changes
<input type="checkbox"/> Custom Translation	<input type="checkbox"/> Zipcode/State Groups	<input type="checkbox"/> Print Dashboard	<input type="checkbox"/> Document Center	<input type="checkbox"/> Employee Census Benefit
<input type="checkbox"/> Custom Fields	<input type="checkbox"/> Action Manager	<input type="checkbox"/> Express Termination	<input type="checkbox"/> Media Center	<input type="checkbox"/> Employee Census
<input type="checkbox"/> Custom Views	<input type="checkbox"/> Mass Approve Rates	<input type="checkbox"/> Express Address Changes	<input type="checkbox"/> Billing Invoice Document Center	<input type="checkbox"/> Employee Dep Census Ben
<input checked="" type="checkbox"/> Custom Overrides	<input type="checkbox"/> Bundle Plans	<input type="checkbox"/> Mass Functions	<input type="checkbox"/> Billing Setup	<input type="checkbox"/> Initial Enrollment Status
<input checked="" type="checkbox"/> Layout Manager >	<input type="checkbox"/> Allocate Plans		<input type="checkbox"/> Billing Invoice Center	<input type="checkbox"/> Open Enrollment Status
<input type="checkbox"/> Admin Home	<input type="checkbox"/> Mass Allocate Plans		<input type="checkbox"/> Message Center	<input type="checkbox"/> COBRA Reports> <input type="checkbox"/> COBRA Report Qualifying Events <input type="checkbox"/> COBRA Activity <input type="checkbox"/> COBRA Deposit <input type="checkbox"/> COBRA QE Notices <input type="checkbox"/> COBRA Transfer
<input type="checkbox"/> Slider	<input type="checkbox"/> Plan Class Update		<input type="checkbox"/> Manage Templates	
<input checked="" type="checkbox"/> Member Home	<input type="checkbox"/> Benefit Access Rules		<input type="checkbox"/> Manage Files	
<input type="checkbox"/> Partner Home	<input type="checkbox"/> Account Rules		<input type="checkbox"/> Import/Export Wizard> <input type="checkbox"/> Imports <input type="checkbox"/> Exports	
<input type="checkbox"/> Dependent Home	<input type="checkbox"/> Tax Tables		<input type="checkbox"/> Export/Import/Transfer Logs	<input type="checkbox"/> Super Admin Reports> <input type="checkbox"/> Billing <input type="checkbox"/> Billing Change <input type="checkbox"/> Company Export <input type="checkbox"/> Allocations Export <input type="checkbox"/> Bundles Export <input type="checkbox"/> Audit – Quick Report <input type="checkbox"/> Audit – Full Report
<input type="checkbox"/> Admin Enrollment			<input type="checkbox"/> Data Integration Management> <input type="checkbox"/> Export Logs <input type="checkbox"/> Transfer Logs <input type="checkbox"/> Import Logs <input type="checkbox"/> Plan Import Logs	
<input checked="" type="checkbox"/> Member Enrollment			<input type="checkbox"/> Account Command Center	
<input type="checkbox"/> Sign-on			<input type="checkbox"/> Manage Payroll> <input type="checkbox"/> Calendar <input type="checkbox"/> Schedules <input type="checkbox"/> Configs <input type="checkbox"/> Profiles <input type="checkbox"/> Pending <input type="checkbox"/> Finalized <input type="checkbox"/> Adjustments <input type="checkbox"/> Comparisons <input type="checkbox"/> Dashboard	
<input type="checkbox"/> Survey Manager			<input type="checkbox"/> Manage Services> <input type="checkbox"/> Dashboard <input type="checkbox"/> Logs <input type="checkbox"/> Usage Chart <input type="checkbox"/> Configurations <input type="checkbox"/> Inbound Setup <input type="checkbox"/> Outbound Setup	<input type="checkbox"/> More Reports> <input type="checkbox"/> BAR Detail <input type="checkbox"/> Dependent Census Benefit <input type="checkbox"/> Address Change <input type="checkbox"/> Beneficiary Designation <input type="checkbox"/> Demographic Change <input type="checkbox"/> Employee Directory <input type="checkbox"/> News Hires <input type="checkbox"/> Employee Termination <input type="checkbox"/> Payroll Deduction Audit <input type="checkbox"/> EEO-1 <input type="checkbox"/> Evidence of Insurability
<input checked="" type="checkbox"/> Decision Support Tools			<input type="checkbox"/> ACA Administration> <input type="checkbox"/> ACA IRS Dashboard <input type="checkbox"/> ACA 1095 Mass Updates <input type="checkbox"/> ACA IRS Command Center	
<input type="checkbox"/> Verification Manager				
<input type="checkbox"/> Discovery				

Feature Toggles Apply

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Overview

The MyChoice Mobile App is an inherent part of Benefitsolver and is included in the Core PEPM for all clients. The MyChoice Mobile App is available on both Apple and Android stores for free.

Members can access the MyChoice Mobile App using an existing web username and password (when not SSO) or by retrieving an Access Code from the mobile app widget on the Member Home page.

To add the MyChoice Mobile App to any client's service, complete the Confirmed Service check and add the widget to member layouts.

Here's what to expect:

- ▶ **My Dashboard:** The carousel offers up tasks by tapping the Action Needed button, Benefit Summary, Contact Info, and the HSA/FSA store (when applicable). The bottom nav provides access to Benefits, ID Cards, Consumer Accounts (when applicable), and additional access for personalized navigation, Messages, and Profile via the View More button.
- ▶ **Benefits:** View a detailed account of current and future plan details. Carrier information is also included for each by tapping the plan tile to open the Benefit Details page.
- ▶ **Beneficiaries/Dependents:** Profile page provides a view of all listed primary and contingent beneficiaries for applicable insurance policies and review which dependents are covered.
- ▶ **Action Needed:** Stay on top of important deadlines, send and receive important documentation regarding benefits, such as dependent verification and EOI. Member Home layout must include the To Do widget for To Dos to be communicated in the MyChoice Mobile App.
- ▶ **ID Cards:** Upload and store images of ID cards for use on the go.
- ▶ **Contact Info:** Easily contact a Member Advocate or chat with Sofia for general questions about benefits, enrollment, life events or required documentation. Plan vendor information is also provided on this page.
- ▶ **Accounts:** Access to view Spending Account details, view previous claims, and submit a new claim.
- ▶ **Messages:** On the go access to messages making it easy to stay in the know.
- ▶ **Documents:** Located in the hamburger menu, easy access to a member's personal documents.
- ▶ **Reference Center:** Located in the hamburger menu (when turned on), members can easily connect to helpful reference documents.

Supported Platforms

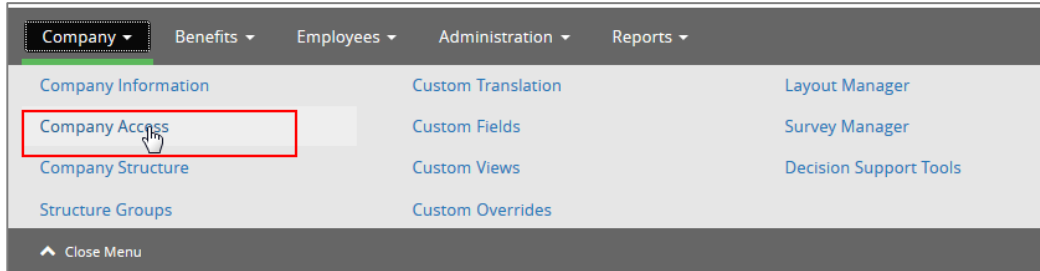
The MyChoice Mobile App supports both iOS and Android platforms. We support iPhone 6s and above, along with Samsung phones. In addition, for best use, we recommend the following operating systems:

- ▶ Android operating system 9 and higher; and
- ▶ iOS 12 and higher.

Work Instructions

Step 1: Company Access

1. Navigate to **Company > Company Access**.



2. In the **Additional Access** tab, turn on the **MyChoice Mobile App** option by checking the box.

Message Center	<input checked="" type="checkbox"/>	Start Date:	<input type="text"/>	End Date:	<input type="text"/>	
Message Center Help/Member Email	<input type="checkbox"/>	Start Date:	<input type="text"/>	End Date:	<input type="text"/>	
My Choice	<input checked="" type="checkbox"/>	Start Date:	<input type="text"/>	End Date:	<input type="text"/>	
MyChoice Mobile App	<input checked="" type="checkbox"/>	Start Date:	<input type="text" value="02/20/2017"/>	End Date:	<input type="text"/>	
Paycheck Viewing	<input type="checkbox"/>	Select Structures	Start Date:	<input type="text"/>	End Date:	<input type="text"/>

3. Input the **Start Date**.
4. Click **Save** (lower left corner).

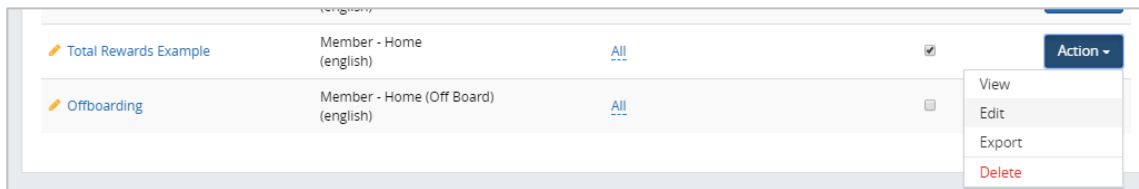
Step 2: Add Mobile App Widget to Member Home & Thank You Layouts and Configure

After turning on MyChoice Mobile App in Company Access, add the Mobile App widget to layouts. Members can access the MyChoice Mobile App using an existing web username and password (when not SSO) or by retrieving an Access Code from the widget. Therefore, the widget must be accessible and visible to members needing to generate an Access Code.

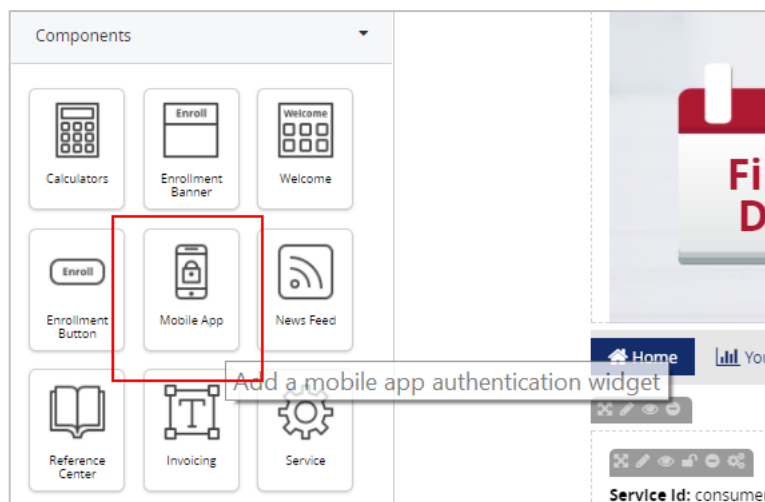
Best Practice

- ▶ Add the widget to both the Member Home and Thank You layouts.
- ▶ Inclusion on the Member Home layout allows the member to generate the Access Code at their convenience. MyChoice Mobile App can be downloaded from the Apple and Google app stores.
- ▶ Inclusion on the Thank You layout is a great reminder for members to download the MyChoice Mobile App to manage their benefits now that their enrollment is complete.

1. Navigate to **Company > Layout Manager**.
2. Select **Member Home** from the drop down.
3. For the applicable **Member Home** layouts where the Mobile App widget should reside, click the **Actions** menu and select **Edit**.



4. Click **Components** (left menu).
5. Drag and drop the **Mobile App** widget onto the layout. Best Practice is to use the far-right container widget.



6. Save the widget.

Create Mobile App Widget X

The fields below are not editable. The title and all link text is standard across all clients.

Title
MyChoice Mobile App

App Link Text
Download the MyChoice App. The easy, convenient way to review your benefits!

Link Text
Get Access Code

7. Click **Save and Exit** (upper right).8. Click the **Member Enrollment** tab in the Layout Manager Menu.9. Find the row for **Member Thank You** and click **Action** menu and then select **Edit**.

a. If you do not have a Thank You Layout, create a new one using the menu at the top of the page.

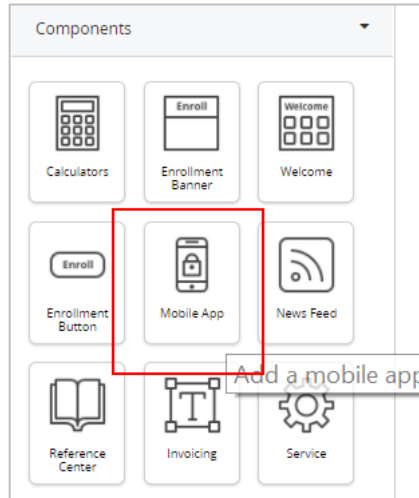
i. Layout Name: Thank you Layout

ii. Layout Type: Member – Thank You

iii. Click **Add New Layout**.

Layout Name	Type	Access Control	Enabled	Actions
Member - Election	Member - Election (english)	All	<input checked="" type="checkbox"/>	Action -
Closing Message	Member - Closing Message (english)	All	<input checked="" type="checkbox"/>	Action -
Opening Message	Member - Opening Message (english)	All	<input checked="" type="checkbox"/>	Action -
Thank You Layout	Member - Thank You (english)	All	<input checked="" type="checkbox"/>	Action - View Edit Export Delete

10. Once in the layout, click the **Components** tab (left menu) and drag and drop the **Mobile App** widget anywhere on your layout. If it's a new layout, add a container first.



11. Save the widget.

Create Mobile App Widget X

The fields below are not editable. The title and all link text is standard across all clients.

Title
MyChoice Mobile App

App Link Text
Download the MyChoice App. The easy, convenient way to review your benefits!

Link Text
Get Access Code

12. Click **Save & Exit** to save your layout (upper right).

Configurable Setup Options

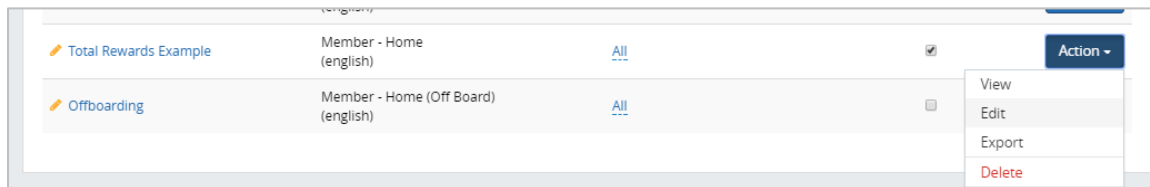
Consider the following options for your client's setup of the MyChoice Mobile App.

To Do Widget

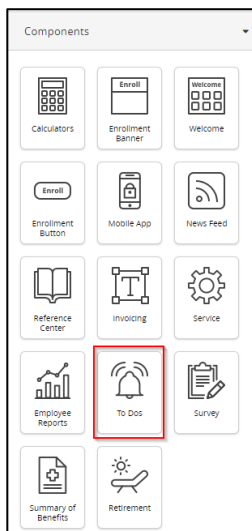
Add the To Do widget to all enabled Member Home layouts when the client wants this information communicated to members in the MyChoice Mobile App. **The MyChoice Mobile App's task list pulls information from the To Do widget.**

- The MyChoice Mobile App cannot pull information from a To Do widget located on a subpage/microsite.
- The 'Member - Mobile' layout type is unrelated to the MyChoice Mobile App. The 'Member - Mobile' layout type provides a version of Benefitsolver that is optimized for mobile devices.
- Adding the widget to the 'Member - Mobile' layout will not result in tasks appearing in the MyChoice Mobile App.

1. Navigate to **Company > Layout Manager**.
2. Select **Member Home** from the drop down.
3. For the active **Member Home** layouts where the To Do widget should reside, click the **Actions** menu and select **Edit**.



4. Click **Components** (left menu).
5. Drag and drop the **To Dos** widget onto the layout.



- Configure and save the widget. Best practice is to accept the default settings (all boxes checked).

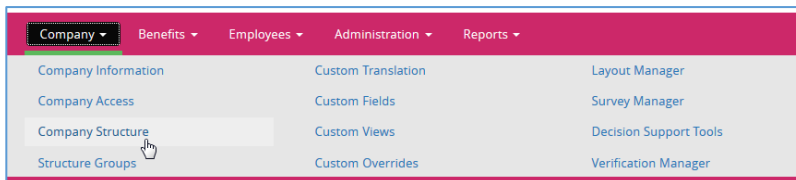
- Click **Save and Exit** (upper right).

Divisional Name, Phone, and Support Text

When a company wishes to use the divisional client names to represent their business on the MyChoice Mobile App, instead of the company name listed in Benefitsolver, they can do so by changing the MyChoice App Division Name. Additionally, it's possible to customize the contact information by division.

Multi-divisional clients and reseller clients now have a way to display differing support and service numbers/text in the MyChoice Mobile App in a divisional breakdown. This ensures all members have the appropriate contact information for support.

- Navigate to **Company > Company Structure**.



- Highlight divisions in the **Current Divisions** area that need to be changed (one division at a time).
- Click **Edit**.

Company - Company Structures

Divisions

Add Division:

Primary Color:

MyChoice App Division Name:

MyChoice App Support Phone:

MyChoice App Support Text:

Optional 1: Optional 2: Optional 3: Optional 4: Optional 5:

Current Divisions:

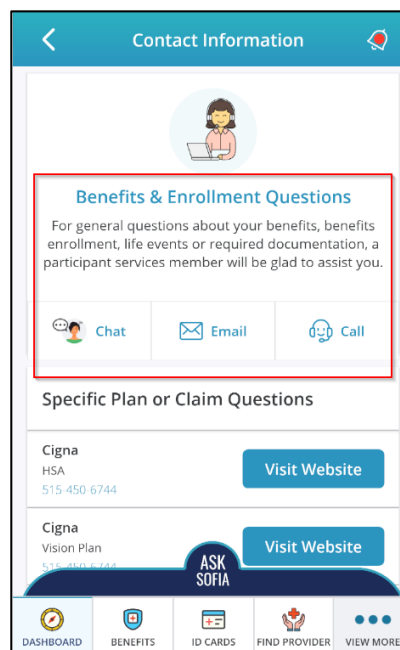
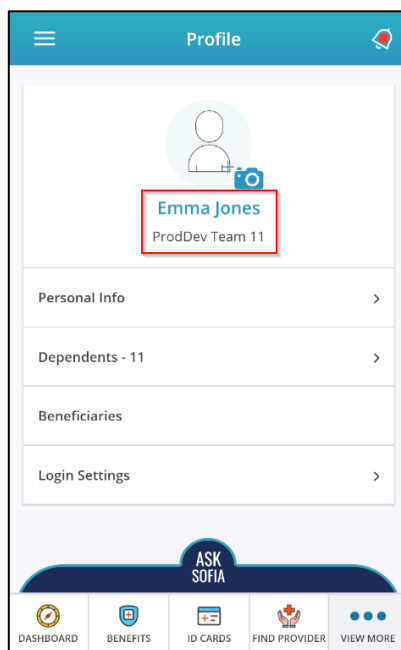
- Apex
- Brite
- Honor
- Pinnacle

Division Logo: No file chosen

4. Complete the following fields as applicable.
 - a. MyChoice App Division Name
 - b. MyChoice App Support Phone
 - c. MyChoice App Support Text
5. Click **Save**.
6. Repeat for each division as applicable.

When completed, the division name will display on the MyChoice Mobile App instead of the company level name. When a member uses the MyChoice Mobile App, contact info will be appropriate to them based on their division.

If no information is changed under Company Structure or Divisional Setup, then members will see the generic COBRA number.



Remove the Customer Service Phone Number

Clients using the MyChoice Mobile App have the option to NOT include a phone number to the Service Center so that they can direct their employees elsewhere.

1. Navigate to **Company > Custom Overrides**.
2. For **Override Type**, choose **Exclude Company Support Phone**.
3. Select the checkbox **Do not include phone number on MyChoice Mobile App**.
4. Click **Save**.

NOTE: If selected, enter customer "Support Text" to direct users to the correct source of help. (See previous section Divisional Support Text).

The screenshot shows a web form titled "Company - Custom Overrides". Inside the form, there is a section labeled "Custom Overrides". Below this, there is a field for "Override Type:" with a dropdown menu currently showing "Exclude Company Support Phone". Further down, there is a checkbox labeled "Do not include phone number on MyChoice Mobile App" which is checked. At the bottom of the form, there are two buttons: "Save" (highlighted with a green box) and "Cancel".

Compose Messages

Clients can choose to allow members to compose messages to their Admins from the MyChoice Mobile App. If Workgroups are in place for this client, messages will be sent to the workgroup. If there isn't a workgroup setup for that client and the access is turned on, there will be a list of administrators for the member to select from. Selection of administrators will have either Employee Access Edit or Employee Access View Only rights tied to that member's structure group.

1. Navigate to **Company > Company Access**.
2. Scroll to the row for **Message Center Help/Member email** and add a **Start** date to allow messages to be composed in both Benefitsolver and the MyChoice Mobile App.

The screenshot shows a single row in a table. The text in the row is "Message Center Help/Member Email". To the right of the text is a small square checkbox that is checked.

3. Click **Save** (lower right).

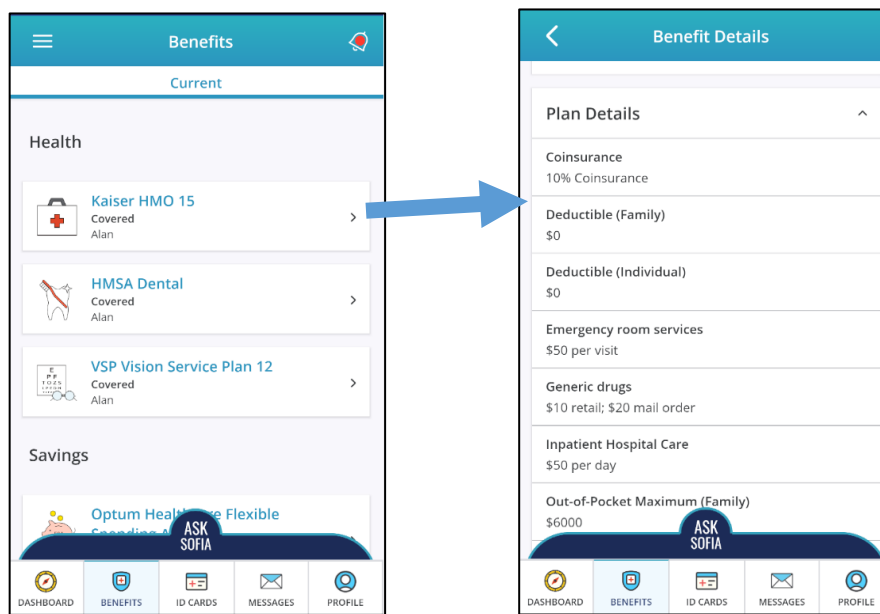
Plan Compare & Plan Overview

If Plan Compare is turned on in Decision Support, the details for Plan Compare will be accessible from the MyChoice Mobile App. Also, when a plan has Plan Overview built in the Plan Info, the overview text will be available within the MyChoice Mobile App.

- ▶ For instructions on **adding details through Plan Compare**, review [Overview of MyChoice Implementation](#).

TIP MyChoice RE does not need to be turned on to complete the plan compare/plan details section.

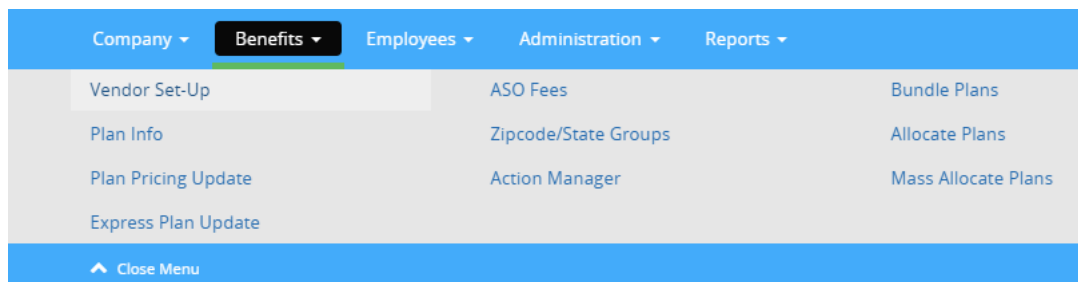
- ▶ For instructions on **adding Plan Overview text**, review [How to Add A Plan \(specifically, see page 6\)](#).



Custom Vendor/Carrier Contact

Carrier contact information is available in several areas of the MyChoice Mobile App (listed within each benefit and on the contact page), if it is set up within the Vendor Setup.

1. Navigate to **Benefits > Vendor Setup**.



2. Find the row for the applicable vendor and in the **Action** column, click the pencil icon.

3. Enter correct information for the fields **Customer Support Phone** and **Vendor Website**.

TIP

When the vendor record doesn't include a Customer Support Phone Number, the Vendor Parent's Customer Support Phone Number will be displayed in the app.

Benefits - Vendor Set-Up

Vendor Set-Up

Name *

Federal Tax ID *

Vendor Parent *

Vendor Status *

Active
 Inactive

Customer Support Phone

Vendor Website (Displayed in MyChoice Mobile App)

4. Click **Submit** (lower right).
5. Repeat these steps for each applicable vendor/carrier.

Additional Features & Information

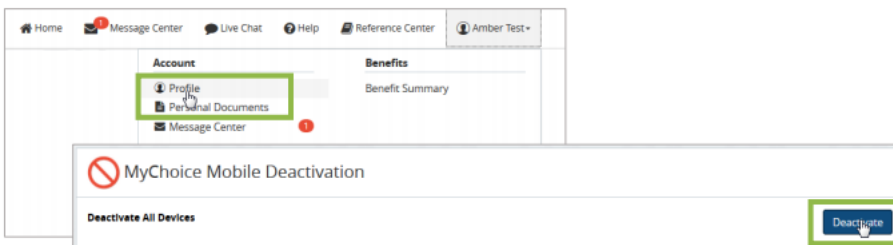
Deactivate an Account

Members can deactivate the MyChoice Mobile App:

1. Select **Profile** on the web
2. Scrolling down.
3. Click **Deactivate**.

Once clicked, all mobile devices associated with this account will be “unauthenticated”.

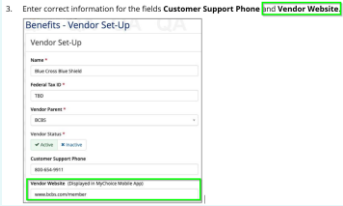
Members can re-activate mobile devices by registering the MyChoice Mobile App using their web username and password or with a new access code.



Security Questions and Multi-Factor Authentication

The MyChoice Mobile App doesn't require special set-up to utilize security questions and multi-factor authentication. Settings for security questions and MFA are utilized by the MyChoice Mobile App.

Appendix A: Document Revision History

Version	Date	Updated by	Requested by	Summary
1.2	09/26/19	Cweiner	Jwilliams	<ul style="list-style-type: none"> Updated mobile screen shots. Updated names of access rights to Employee Access Edit or Employee Access View Only rights. Added information about To Do widget.
1.3	10/14/19	Cweiner/ Jwilliams	Jwilliams	<ul style="list-style-type: none"> Removed configuration options for Mobile App widget (no longer configurable). Updated steps and screen shots.
1.4	10/30/19	Jwilliams	Jwilliams	<ul style="list-style-type: none"> Added clarification regarding placement of To Do widget.
1.5	5/28/2020	Jwilliams/ cweiner	Jwilliams	<ul style="list-style-type: none"> Updated to reference new username and password registration functionality. Replaced screenshot on page 17 and added specific text reference to the vendor website.
1.6	6/22/2020	weiner	syacobucci	
1.7	8/31/2020	jwilliams	jwilliams	<ul style="list-style-type: none"> Updated supported platforms Updated screen shots on pages 14 & 16.
1.8	7/28/2021	Jwilliams	Jwilliams	<ul style="list-style-type: none"> Added mobile layout clarification on page 11.