

Employer Portal User Guide Update

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The new version of the Employer Portal updates the user interface to a more modern experience that includes new features added to the existing version. This document is a reference for basic and alternative processes for the Employer Portal updates	3
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Document Overview

The new version of the Employer Portal updates the user interface to a more modern experience that includes new features added to the existing version. This document is a reference for basic and alternative processes for the Employer Portal updates.

Getting Started

To access the new Employer Portal, you will follow the current procedure for Brokers and Group Administrators. After successfully logging in, you will be land on the new Employer Portal interface.

Image 1 – Employer Portal Homepage

The screenshot displays the Employer Portal homepage. At the top, there is a navigation bar with 'Logo' on the left and 'Language Assistance' and 'Support' on the right. Below this is a secondary menu with 'Home', 'Enrollment', 'Client/Group Management', 'Billing', 'Documents', 'Resources', and 'News'. A blue pill-shaped button labeled 'Ballard Spahr LLP' is centered below the menu. The main content area is divided into several sections:

- Welcome Shari, Let's Get Started!**: Includes an 'Add New Enrollment' button and a search section for employees. The search section has a dropdown for 'Search With *' (set to 'Last Name') and a text input for 'Group Number/Member ID/SSN/Agreement ID/Last Name *'. A 'Search' button is below.
- What's New**: A section titled 'Welcome to Employer portal' with a message: 'We've updated our look and made the most important information more accessible. Now, you can find an employee, get important phone numbers, and much more all on the home page.' It features an illustration of a person at a desk.
- Recent Enrollment Activity**: A section with a note: 'The following list includes enrollments that are pending because they are in a 'Saved', 'Partially-Submitted' or 'Submitted' state. Partially-Submitted and Submitted states will take 24 hours for the enrollment to be complete.' Below this is a table:

Subscriber First Name	Subscriber Last Name	SSN	Status	Last Updated	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
TestLast	member	XXXXX3123	SAVED	3 Nov 2023 09:35 AM	
test	member	XXXXX8678	SAVED	2 Nov 2023 04:18 PM	
TESTNAME	MEMBER	XXXXX2124	SUBMITTED	26 Oct 2023 04:34 PM	

At the bottom of the page, there are three informational cards:

- Find a Provider**: 'Help your employees find an in-network provider in their area.' [Learn More](#)
- Processing Guidelines**: 'Know the rules about future and retroactive dating, new dependents, and which products are supported.' [Learn More](#)
- Retroactive Policy**: 'Find out exactly how retroactive terminations apply to various groups, as well as retro adds/changes.' [Learn More](#)

Employer Portal Homepage

Employer Portal Homepage has a Header, Navigational Tabs, Body, and Footer.

Header

The Header has the list of attributes/items can be accessed from any page.

The Header attributes list contains,

- Language Assistance
- Support
- Search Icon
- Profile Link – User Profile
- View Notifications
- Logo/Branding Information
- Navigational Bar/Tab

Control	Functionality
Language Assistance	<p>The Language assistance link allows the user or plan administrator to select the available language preferences to view the portal.</p> <p>Languages available for selection are English – Default, Spanish, Dutch, Russian etc. This link is available on the top right-hand corner of the landing page.</p> <p>For other languages they must reach customer support. The contact details would vary for each brand and LOB.</p>
Support	<p>Support is the link where the plan administrator can click to request support. Support is menu available on the top right-hand corner of the Homepage. Support hyperlink has two sub menus.</p> <ol style="list-style-type: none"> a. Contacts b. Submit Service Ticket
Profile link	<p>Profile Link appears as Avatar icon on top right side of Homepage Header Menu. When User click on it, User Profile, Access Management and Logout options available.</p>
	<p>Under User profile, View demographics information and under Access Management the entitlement information for the overall site and for each group is displayed. For example, you may be able to modify employee data for some groups, but only view employee data for other groups. This page includes the Change Your Password link if it's applicable.</p>
	<p>Note: Contact your Client Manager/Broker if the information needs to be. Their contact information can be found in the Clients/Groups tab.</p>
Logout link	Log out of the portal.

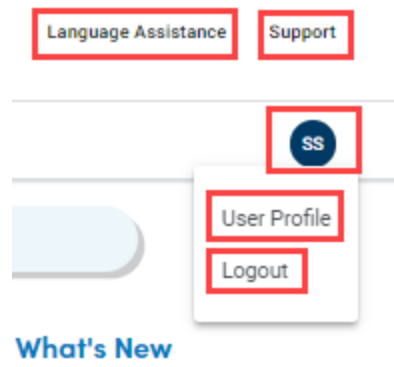
Logo/Branding
Information

Logo is a Branding information which is dynamic and will change according to the Plan partners and LOB. The Logo is always located on the left-hand top corner of the landing page. The Experience we provide like Member, Sales, Employer portal will be displayed below the logo.

Image: 2 – Employer Portal Header



Image: 3 – Language Assistance & Support

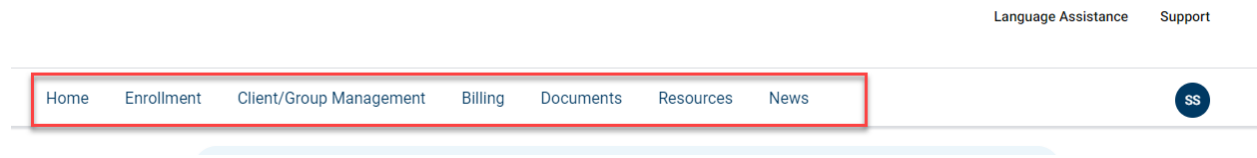


Navigational Bar/Tabs

The **Navigational Tabs or Header Menu** can be found at the top of every web page. You can navigate to different sections of the portal by clicking these tabs.

Tab	Functionality
Home	Home tab is present on top left of the Homepage Header Menu. Users click on <i>Home</i> button the system displays Home page.
Enrollment	Enrollment tab is present beside home button on Homepage Header Menu. User selects to Enrollment tab, system displays list which includes (Enrollment Listing, Add new Enrollment, Search for Member). User can select any one of the lists from this tab where user can Enroll a new employee or make updates to an existing employee, cancel coverage, or monitor enrollment activities.
Client /Group Management	Client /Group Management tab is present beside Enrollment button on Homepage Header Menu. User selects to this tab to get Client information, Client Contacts, Group Listing information.
Billing	Billing tab is present next to Client/Group Management tab on Homepage Header Menu. If User is entitled to this feature , User will be able to access the e-Bill system and access the Billing information.
Documents	Documents tab is present next to Contracts tab on Homepage Header Menu. User can view the Benefit Documents and contracts documents in this tab.
Resources	Resources tab is present next to Documents tab on Homepage Header Menu. User can select list of sub menu and view the required information and the list includes - Find forms, Benefit Documents, Applications, Group Bulletins and Helpful Information.
News	The user can view the latest news displayed on this page.

Image 4 – Navigation Bar



Homepage

The **Homepage** includes shortcuts to common functionality, highlights information that may be of interest to you, and displays important contact information.

The Home Page includes the following:

Feature	Functionality
Search Results	System will load the search results for the employee based on selected task/action on the home page.
Add New Enrollment button	System will load the Add New Enrollment flow to add Subscriber and Dependents for an Enrollment.
Enrollment Charts	Displays the Total Employees count by Enrollment activity level and by the coverage plan that the employees are enrolled.
What's New	Read the latest news and updates related to the portal or products.
Recent Enrollment activity status	Display the enrollments that are pending because they are in a 'Saved', 'Partially Submitted' or 'Submitted' statuses.
E-Spots	Find a Provider, Glossary of Health Coverage, Training/FAQs, Wellness Guidelines, and Processing Guidelines. Review content that can help you manage your employee groups. The <i>E-spots</i> may change as new information becomes available.
Quick Links	Access the most common portal functions by clicking the links in the Quick Links ribbon.
Contact Us	Locate important phone numbers, including Customer Service, Membership, and Technical Assistance.

Image 5 – Home Screen

Welcome Shari, Let's Get Started!

[Add New Enrollment](#)

Search For an Employee

You can View & Print ID Cards, Add/Cancel/Reinstate Coverage.

Search With *

Last Name

Group Number/Member ID/SSN/Agreement ID/Last Name *

Search



What's New

Welcome to Employer portal

We've updated our look and made the most important information more accessible. Now, you can find an employee, get important phone numbers, and much more all on the home page.

Recent Enrollment Activity

The following list includes enrollments that are pending because they are in a 'Saved', 'Partially-Submitted' or 'Submitted' state. Partially-Submitted and Submitted states will take 24 hours for the enrollment to be complete.

Subscriber First Name	Subscriber Last Name	SSN	Status	Last Updated
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
No Rows To Show				
0 to 0 of 0 << < Page 0 of 0 > >				

Find a Provider

Help your employees find an in-network provider in their area.

[Learn More](#)

Processing Guidelines

Know the rules about future and retroactive dating, new dependents, and which products are supported

[Learn More](#)

Retroactive Policy

Find out exactly how retroactive terminations apply to various groups, as well as retro adds/changes.

[Learn More](#)

Glossary of Health Coverage

This glossary helps make sense of health care with easy to understand definitions.

[Learn More](#)

Training/FAQs

Learn how to use the Employer Portal to complete your Group Administrator work.

[Learn More](#)

Wellness Guidelines

Share this with employees! It contains preventive care recommendations, topics for provider visits, and a place to track health care info.

[Learn More](#)

Enrollment

Enrollment Listing
Add new enrollment
Search for member

Client & Group Management

Client Management
Group Management

Reporting

Wellness Incentive Report
Enrollment Report
Census Report
Report Navigator

Resources

Support

Contact

Setup/Login Questions and Customer Service

215-587-0360
For issues with user setup, membership questions and questions regarding site navigation and functionality.

Billing Inquiries

215-567-3357 (Philadelphia Area)
1-800-444-6301 (Outside Philadelphia)

Enrollments

This section provides,

- An overview of the Enrollment Tab.
- How to use the enrollment functionality.

User can access the **Enrollment Activity** landing page by selecting the **Enrollments Activity** from Enrollment tab or by scrolling to the **Recent Enrollment Activity** grid. From the Recent Enrollment Activity users can edit and remove enrollments that are in progress.

Image: 6 – Enrollment Listing

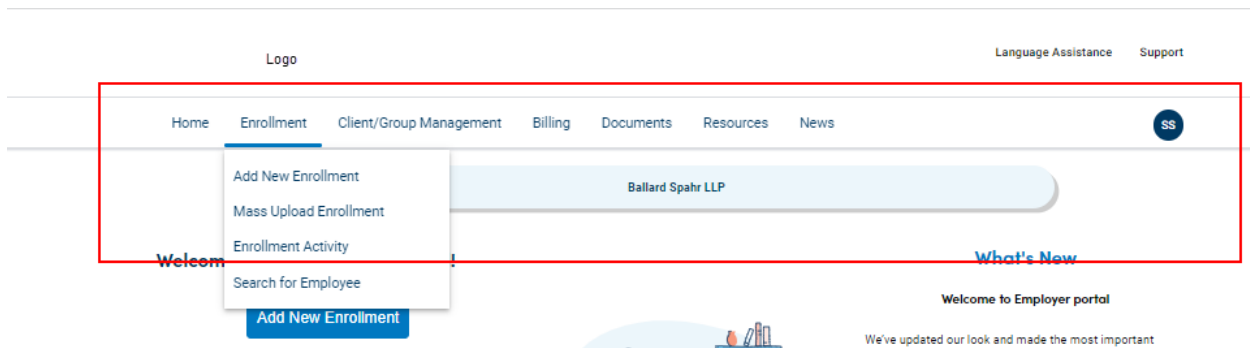


Image: 7 – Enrollment Activity

Recent Enrollment Activity

The following list includes enrollments that are pending because they are in a 'Saved', 'Partially-Submitted' or 'Submitted' state. Partially-Submitted and Submitted states will take 24 hours for the enrollment to be complete.

Subscriber First Name	Subscriber Last Name	SSN	Status	Last Updated	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
test	member	XXXXX8878	SAVED	2 Nov 2023 04:18 PM	
TESTNAME	MEMBER	XXXXX2124	SUBMITTED	26 Oct 2023 04:34 PM	
TestLast	member	XXXXX3123	SAVED	19 Oct 2023 07:50 AM	

1 to 3 of 3 << < Page 1 of 1 > >>

Enrollments Activity

The **Enrollments Activity page** allows you to review the status for incomplete and processing enrollment transactions.

User selects **Enrollment Activity** from on **Enrollment** tab. Records can be viewed, modified, or deleted, depending upon their status.

25 enrollments in process/ enrollment in listing display on the Enrollments page. If there are more than 25 enrollments in process, user can view them by clicking the right arrow (>) button at bottom of grid.

Saved Status:

1. Records in the Saved status (not sent for processing yet) can be modified by clicking on the Edit icon for respective row in the grid.
2. Clicking on the Edit icon, system will display the Add Employee flow.
3. Saved enrollments can be deleted by clicking the delete (trashcan) icon. A warning message for deleting the transaction will appear and user would need to select yes to proceed and that action will delete the transaction.

Submitted or Partially Submitted Status:

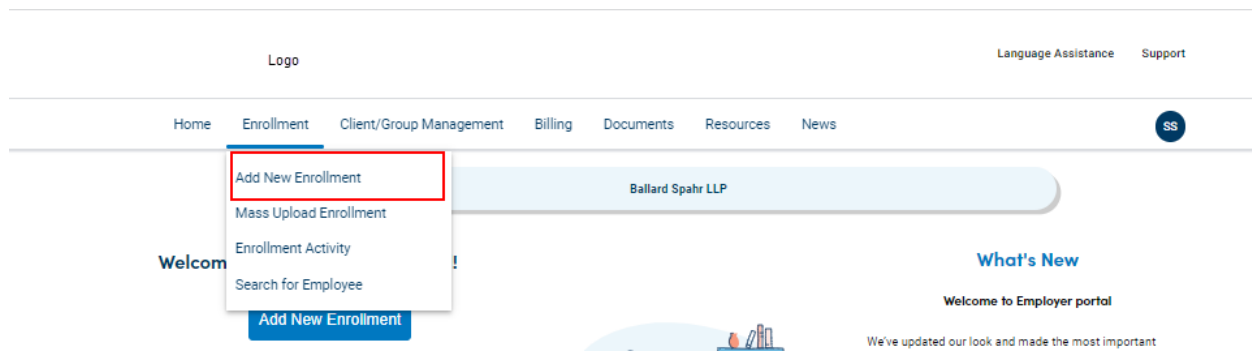
The subscriber record has been sent for processing but has not yet been finalized by membership.

Add Employee

Click **Add New Employee** from Enrollment tab on Home Menu to add a new subscriber and dependent(s) to the membership database.

Note: Fields marked **Required** fields are Mandatory fields. If any of these fields are not completed or incorrect, a notification will display in red text.

Image: 7.1 – Enrollment Listing



To add a New Subscriber:

In Add New Enrollment flow when select the New Subscriber, 6 tabs will display for entering information.

- Subscriber Identification
- Dependent management
- Plan Coverage Election
- Provider Selection
- Coordination of Benefits
- Review& Submit

The user must fill in the details on each tab in the sequential order for moving to next step/tab. The 5th section, Coordination of Benefits will load more fields based on drop down value selected for Other Insurance, Medicare. The user can navigate back to any completed tab at any time by using the back button. The Title of tab will turn green and change as **Completed** once all information is entered and saved.

a) Subscriber Identification

Qualifying Event field will display as a dropdown and Event Date as Calendar. User can select as applicable from dropdown list.

1. Enter **Subscriber Dates** (Employer Hire Date and Coverage Effective Date) and make sure that you carefully enter Coverage Effective Date this is the first date when coverage will be available to the subscriber.
2. Select Employer Coverage by Cobra as applicable.
3. Enter subscriber **Personal information**, such as Prefix, Legal First Name, Legal Middle Name, Legal Last Name, Gender, Birth date, and SSN.
4. Enter **Location** details (Address details- Address, Zip code, City and State)
5. Enter **Contact Information** (Home Phone Number, Work Phone Number, Mobile Number, Email details).
6. Click Save to save the enrollment in Enrollments in Process and Click Next button to go to the next step.

Image: 7.2 – Add Employee – Subscriber Identification

Home Enrollment Client/Group Management Billing Documents Resources News SS

Add Employee

1 Subscriber Identification Required 2 Dependent Management 3 Plan Coverage Election Required 4 Provider Selection 5 Coordination of Benefits Required 6 Review & Submit Required

Subscriber Dates

Employee Hire Date (MM/DD/YYYY)

Coverage Effective Date Required (MM/DD/YYYY)
Select carefully. This is the first day that any coverage will be available.
Please note: The effective date must adhere to the new hire eligibility guidelines established by your company. Failure to adhere to these guidelines will result in delayed enrollments.

Personal Information

Prefix Legal First Name Legal Middle Name
Required (Letters, Hyphen(-) & Apostrophe(') Allowed)

Legal Last Name Suffix Gender
Required (Letters, Hyphen(-) & Apostrophe(') Allowed) Required

Birth Date Social Security Number (SSN) Confirm Social Security Number (SSN)
Required (MM/DD/YYYY) Required (123-45-6789) Required (123-45-6789)

Location

Address 01 Address 02 Zip Code
Required Required

City State
Required Required

Contact Information

Home Phone Number Work Phone Number Work Fax Number

Mobile Phone Number Work Email Address

Only employees can change their mobile phone number, either online or by calling Customer Service.

b) Dependent Management

*If the subscriber does not have dependents, click **Save & Next** to proceed to Plan and Coverage Election*

1. Enter Dependent **Personal information**, such as Prefix, Legal First Name, Legal Middle Name, Legal Last Name, Suffix, Gender, Birth date, Relationship to Subscriber, Special Status and SSN.
2. Click **Save** button to save the enrollment in Enrollments in Process.
3. **Currently Added dependents** section will show up once a dependent is added, and data displayed in rows one below the other. User can modify by edit or delete the current added dependents in this grid.
4. Click **Add Another Dependent** button if you want to add dependents. You will need to add multiple dependents by clicking Add multiple times.
5. Click **Save & Next** to go to the next step or click Save for Later to save the enrollment in Enrollment in Process.

Image: 7.4 – Add Employee – Plan Coverage Election

Home Enrollment Client/Group Management Billing Documents Resources News SS

1 Subscriber Identification Complete 2 Dependent Management Complete 3 Plan Coverage Election Required 4 Provider Selection 5 Coordination of Benefits Required 6 Review & Submit Required

Plan Coverage

Select a plan and assign it to the subscriber and dependents as needed.

Please Note: If you do not see plan options to select, please check and correct the subscribers zip code. Plan availability is based on zip code. Please contact customer service for assistance.

Medical Plan Election

Medical Plan None <small>Required</small>	Effective Date 10/10/2023 <small>Required (MM/DD/YYYY)</small>	Select Individuals for Enrollment <small>Required</small>
---	--	--

Vision Plan Election

Vision Plan None <small>Required</small>	Effective Date 10/10/2023 <small>Required (MM/DD/YYYY)</small>	Select Individuals for Enrollment <small>Required</small>
--	--	--

Dental Plan Election

Dental Plan None <small>Required</small>	Effective Date 10/10/2023 <small>Required (MM/DD/YYYY)</small>	Select Individuals for Enrollment <small>Required</small>
--	--	--

Drug Plan Election

Drug Plan None <small>Required</small>	Effective Date 10/10/2023 <small>Required (MM/DD/YYYY)</small>	Select Individuals for Enrollment <small>Required</small>
--	--	--

Service Plan Election

Service Plan None <small>Required</small>	Effective Date 10/10/2023 <small>Required (MM/DD/YYYY)</small>	Select Individuals for Enrollment <small>Required</small>
---	--	--

<< Back Save & Next >>

d) Provider Selection

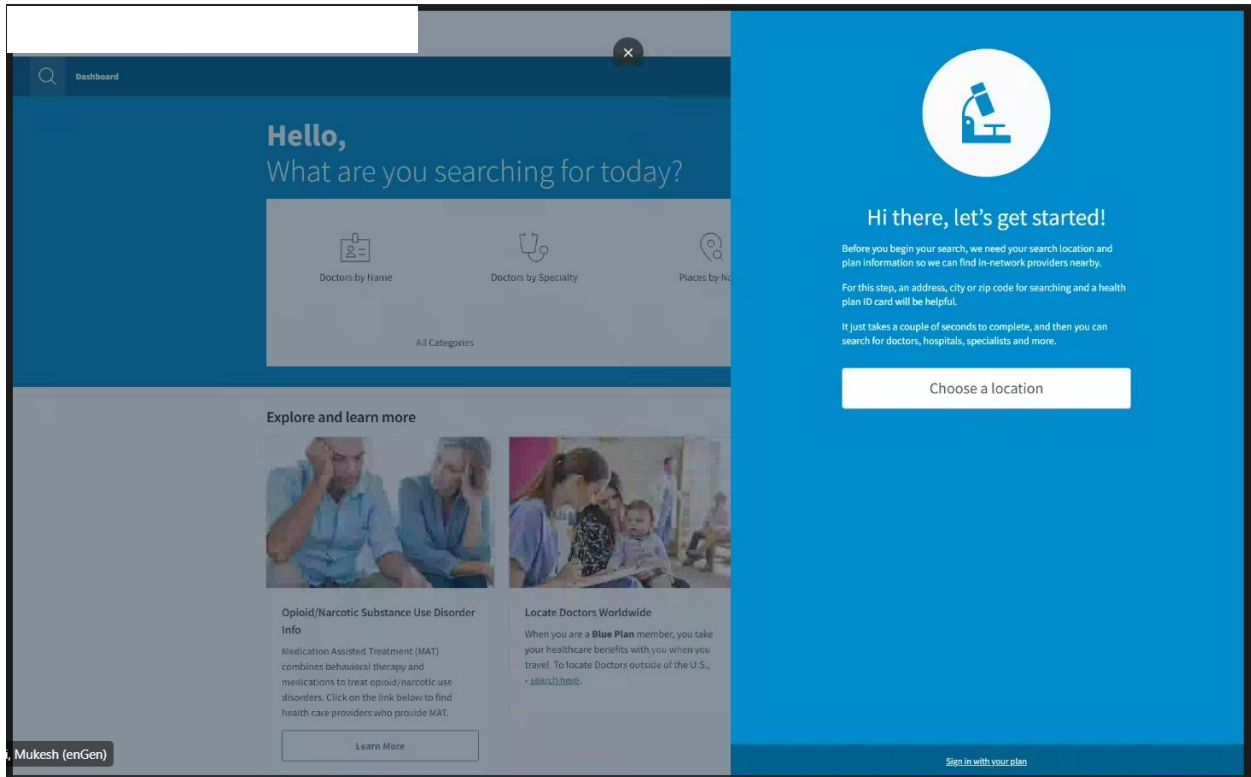
This step is applicable based on selection of the Plan coverage.

1. Select **Provider Directory** link to get the Provider details. Provider search tool will have group number and primary care physician pre-populated in search field.
2. Enter Provider Number, Provider Name, Effective date and select Established Patient from drop down list.
3. Click **Save & Next** button to go to the next step in *Enrollments in Process*.

Image: 7.5 – Add Employee – Provider Selection

The screenshot displays the 'Add Employee' web application interface. At the top, there is a navigation menu with links for Home, Enrollment, Client/Group Management, Billing, Documents, Resources, and News. A user profile icon labeled 'SS' is in the top right corner. Below the navigation is a progress bar with six steps: 1. Subscriber Identification (Complete), 2. Dependent Management (Complete), 3. Plan Coverage Election (Complete), 4. Provider Selection (Current step), 5. Coordination of Benefits (Required), and 6. Review & Submit (Required). The main heading is 'Add Employee'. Below this is the section 'Provider Selection - Optional' with a note: 'This page is optional and will not apply to most Employers. Click save and next to continue.' A sub-heading 'Testing User's Provider' is followed by a form with three input fields: 'Provider Number', 'Provider Name', and 'Effective Date' (with a calendar icon and the value '10/10/2023'). Below these are a dropdown menu for 'Established Patient' and a 'Reason' field with the value 'Initial PCP Selection'. At the bottom, there are two buttons: '<< Back' and 'Save & Next >>'.

Image: 7.6 – Add Employee – Provider Directory



e) Coordination of Benefits

Image: 7.7 – Add Employee – COB

The screenshot displays a web application interface for adding an employee. At the top, there is a navigation menu with links for Home, Enrollment, Client/Group Management, Billing, Documents, Resources, and News. A user profile icon is visible in the top right corner. Below the navigation, the main heading is 'Add Employee'. A progress bar shows six steps: 1. Subscriber Identification (Complete), 2. Dependent Management (Complete), 3. Plan Coverage Election (Complete), 4. Provider Selection (Complete), 5. Coordination of Benefits (Required), and 6. Review & Submit (Required). The 'Coordination of Benefits' section is active, with the instruction: 'Add additional insurance information for each subscriber (if known). This section will also include a place to add other insurance information for dependents. Please select "Unknown" if no additional information is necessary, click save and next to continue.' Below this, there is a sub-section titled 'Testing User's Additional Insurance Information' containing two dropdown menus: 'Other Insurance' and 'Medicare Eligible?'. Both dropdowns are currently set to 'Unknown' and are marked as 'Required'. At the bottom of the form, there are two buttons: '<< Back' and 'Save & Next >>'.

Other Insurance

1. If User select **Other Insurance** as Yes from dropdown list, system will populate the **Other Insurance** tab for the flow.
2. Update required entry fields (Name of Insurance Carrier, Group Number, Policy Number, Policy Holder Legal First Name, Policy Holder Legal Last Name, Effective Coverage Date, Effective Cancel Date, Policy Number, Policy Holder Relation to Subscriber, Policy Holder Birth Date, Policy Holder Employment Status, Policy Holder Type(s) of coverage.)
3. Subscriber card should display first followed by any dependents, if applicable.
4. Click Next button to go to the next step in Enrollments in Process.

Image: 7.8 – Add Employee – Other Insurance

Language Assistance Support

Home Enrollment **Client/Group Management** Billing Documents Resources News

Add Employee

1 Subscriber Identification Complete 2 Dependent Management Complete 3 Plan Coverage Election Complete 4 Provider Selection Complete 5 **Coordination of Benefits Required** 6 Review & Submit Required

Coordination of Benefits

Add additional insurance information for each subscriber (if known). This section will also include a place to add other insurance information for dependents. Please select "Unknown" if no additional information is necessary, click save and next to continue.

User Test's Additional Insurance Information

Other Insurance: Medicare Eligible?:

Other Insurance

You selected that you have other insurance. Please provide details below.

<input type="text" value="Name of Insurance Carrier"/> <small>Required</small>	<input type="text" value="Group Number"/> <small>Required</small>	<input type="text" value="Policy Number"/> <small>Required</small>
<input type="text" value="Policy Holder Legal First Name"/> <small>Required (Letters, Hyphen(-) & Apostrophe(') Allowed)</small>	<input type="text" value="Policy Holder Legal Last Name"/> <small>Required (Letters, Hyphen(-) & Apostrophe(') Allowed)</small>	<input type="text" value="Policy Holder Birth Date"/> <small>Required (MM/DD/YYYY)</small>
<input type="text" value="Policy Holder Relation to Subscriber"/> <small>Required</small>	<input type="text" value="Policy Holder Employment Status"/> <small>Required</small>	<input type="text" value="Policy Type(s) of Coverage"/> <small>Required</small>
<input type="text" value="Effective Coverage Date"/> <small>Required</small>	<input type="text" value="Effective Cancel Date"/> <small>Required</small>	

Medicare:

1. If User select **Medicare Eligible** as Yes from dropdown list, system will populate the Medicare tab for the flow.
2. Subscriber card should display first followed by any dependents, if applicable.
3. User will update Medicare entry fields (Medicare Claim Number, Why Eligible?, Ever Collected Social Security Disability Income? , Medicare Part A (Hospital Insurance) – Effective Date and Cancel Date, Medicare Part B (Medical Insurance) – Effective Date and Cancel Date, Medicare Part C – Medicare Advantage? (Medicare Replacement), Medicare Part D? (Prescription Drug).
4. Click Next button to go to the next step in Enrollments in Process.

Image: 7.9 – Add Employee – Medicare

Home Enrollment Client/Group Management Billing Documents Resources News SS

1 Subscriber Identification Complete 2 Dependent Management Complete 3 Plan Coverage Election Complete 4 Provider Selection Complete 5 Coordination of Benefits Required 6 Review & Submit Required

Coordination of Benefits

Add additional insurance information for each subscriber (if known). This section will also include a place to add other insurance information for dependents. Please select "Unknown" if no additional information is necessary, click save and next to continue.

John Testing's Additional Insurance Information

Other Insurance Medicare Eligible?

Required Required

Other Insurance

You selected that you have other insurance. Please provide details below.

<input type="text" value="Name of Insurance Carrier"/> <small>Required</small>	<input type="text" value="Group Number"/> <small>Required</small>	<input type="text" value="Policy Number"/> <small>Required</small>
<input type="text" value="Policy Holder Legal First Name"/> <small>Required (Letters, Hyphen() & Apostrophe(') Allowed)</small>	<input type="text" value="Policy Holder Legal Last Name"/> <small>Required (Letters, Hyphen() & Apostrophe(') Allowed)</small>	<input type="text" value="Policy Holder Birth Date"/> <small>Required (MM/DD/YYYY)</small>
<input type="text" value="Policy Holder Relation to Subscriber"/> <small>Required</small>	<input type="text" value="Policy Holder Employment Status"/> <small>Required</small>	<input type="text" value="Policy Type(s) of Coverage"/> <small>Required</small>
<input type="text" value="Effective Coverage Date"/> <small>Required</small>	<input type="text" value="Effective Cancel Date"/> <small>Required</small>	

Medicare

You selected that you are Medicare Eligible. Please provide details below.

<input type="text" value="Medicare Claim Number"/> <small>Required</small>	<input type="text" value="Reason you are eligible?"/> <small>Required</small>
<input type="text" value="Current Employment Status"/> <small>Required</small>	

Ever Collected Social Security Disability Income?
 Yes No
Required

Medicare Part A (Hospital Insurance)

<input type="text" value="Effective Date"/> <small>Required</small>	<input type="text" value="Cancel Date"/> <small>Required</small>
--	---

f) Review & Submit

1. The Review & Submit page captures the selections that were made throughout the enrollment process and allows for one final review of the data entered.
2. If you need to edit anything on the page, you can click the Edit links on the top right side of each section.
3. Click next button & Continue in each section to return to the Review & Submit page to finish the enrollment.
4. Finalize the enrollment by clicking **Submit Enrollment**.
5. Once the enrollment has been successfully completed, a success message will then be displayed as “**Your Employee was Added Successfully**”.

Image: 7.10 – Add Employee –Review & Submit


Home Enrollment Client/Group Management Billing Documents Resources News SS

1 Subscriber Identification Complete 2 Dependent Management Complete 3 Plan Coverage Election Complete 4 Provider Selection Complete 5 Coordination of Benefits Complete 6 Review & Submit Required

Review & Submit

Please review all information prior to submission. Once submitted, the enrollment, in some cases, might need 24-48 hours to be processed before any corrections or edits can be made.

Subscriber Identification

John Testing Edit 

Employee Hire Date 11/01/2023	Coverage Effective Date 12/01/2023	
Prefix --	Legal First Name John	Legal Middle Name --
Legal Last Name Testing	Suffix --	Gender M
Birth Date 06/07/2000	Social Security Number(SSN) *****0900	
Address 1901 Market St	City Philadelphia	State - ZipCode PA - 19104
Home Phone Number	Work Phone Number	Work Fax Number
Mobile Phone Number	Work Email Address	

Dependent Management

Edit 

No Dependents

Plan Selection

Edit 

Coverage Type	Plan	Effective Date
MEDICAL	10308537-PPO Program without Drug Non Flex	12/01/2023
Covered Members		
John Testing		
Coverage Type	Plan	Effective Date
VISION	10308538-Premier Advantage 023 5013	12/01/2023
Covered Members		
John Testing		
Coverage Type	Plan	Effective Date
DRUG	10308545-IBC Freestanding Drug Select 5015	12/01/2023
Covered Members		
John Testing		

Provider Selection

Edit 

John Testing

Provider Number	Provider Name	Effective Date
100800900	Planned Health	12/01/2023
Established Patient	Reason	
true	Initial PCP Selection	

Coordination of Benefits

Edit 

Additional Insurance - John Testing

No Additional Insurance information

Medicare Information - John Testing

No Medicare information

<< Back

Save for Later

✓ Submit Enrollment

Search for Employee

Employee **Search for Employee** functionality allows you to find enrollment data by entering any of the following of an employee's:

- Group Number
- Member ID (UMI) or SSN
- Last Name

1. Search for Employee by group number, member ID or SSN, Last Name
2. System will display the search results for the employee in the grid format.
3. User clicks on Subscriber Name hyperlink from the grid, and system loads directly to the tabs.
 - a. Change PCP

- b. Add Dependent
- c. Manage Spending Accounts (if applicable)
- d. Manage ID Cards
- e. Cancel Coverage (only for active employees)
- f. Reinstate (only for cancelled employees)

Image: 8 – Search for Employee

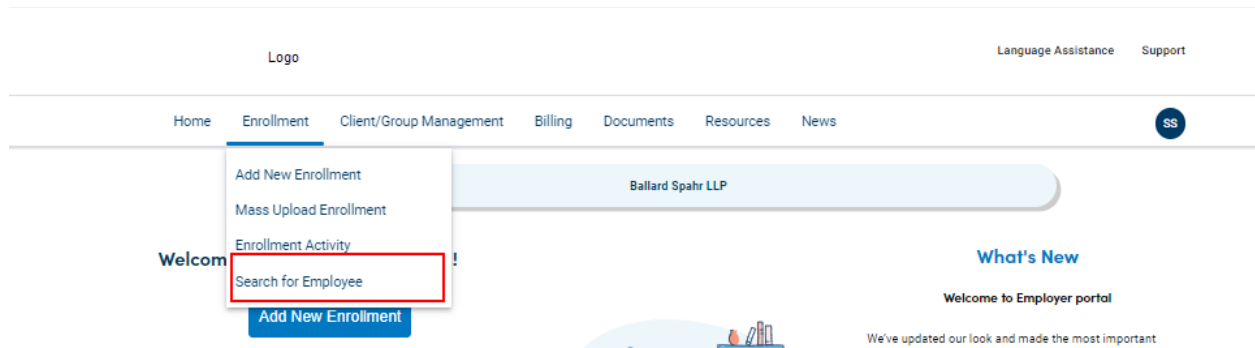


Image: 9 – Search for Employee Results

Home Enrollment Client/Group Management Billing Documents Resources News SS

Search Employee

You can View & Print ID Cards, Add/Cancel/Reinstate Coverage.

In order to search for a current member please conduct your search using the field below and then select from the available results.

Search With * Last Name Group Number/Member ID/SSN/Agreement ID/Last Name Doe X

Search

Search Results(1)

Subscriber Name	Member ID	Agreement Id	Active Group Number	Cancelled Group Number
JOHN DOE			10308	108545

1 to 1 of 1 << >> Page 1 of 1 >>>

Image: 10 – Edit Employee Screen

Logo Language Assistance Support

Home Enrollment Client/Group Management Billing Documents Resources News SS

Name: JOHN DOE Member ID: 515191024001 SSN: *****6789 Group: 10308537 Status: Active Download

[Employee Details](#) Coverage ID Cards Spending Accounts Coordination of Benefits Summary of Benefits and Coverages

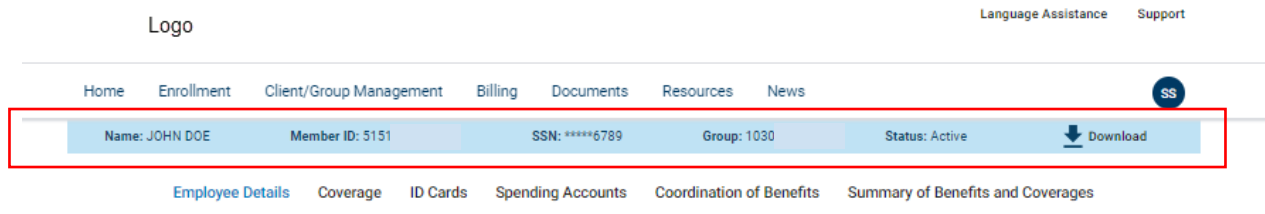
View Subscriber Summary

User can view the subscriber's summary by clicking on the Subscriber Name link from grid after the Search for a member search results display. A download option is available to download the Subscriber Summary.

- Change PCP
- View and Order ID cards

- Manage Spending Account Elections (if applicable)
- ID Cards
- Cancel Coverage (only for active employees)
- Reinstate (only for cancelled employees)

Image: 11 - View Subscriber Summary



Edit Employee Flow

This functionality allows you to edit the employee record. You can make multiple changes on the same page and save once.

Use this option if user wish to:

- a) Edit Demographic information for the Subscriber or Dependents.
- b) Update or add Other Insurance information.
- c) Update or add Medicare information.
- d) Add New Dependent to new or existing dependents.
- e) Change existing coverage.
- f) Change PCP

Edit Demographic Information

1. Search for a Member by Group Number/ Member ID/ Last Name.
2. Click on Subscriber Name hyperlink from the grid.
3. Edit the demographic information if applicable.
4. Enter an effective coverage date.
5. Click the Save button.
6. If changes are successful, a success message displayed as **“Employee Information Updated Successfully”**.

Image: 12 – Edit Flow: Employee Details

Home Enrollment Client/Group Management Billing Documents Resources News

Name: JOHN DOE Member ID: 5151 SSN: *****6789 Group: 103 Status: Active Download

Employee Details Coverage ID Cards Spending Accounts Coordination of Benefits Summary of Benefits and Coverages

Employee Details

Subscriber Information

Prefix	Legal First Name JOHN <small>Required</small>	Legal Middle Name
Legal Last Name DOE <small>Required</small>	Suffix	Gender Male
Date of Birth(DOB) 10/9/1974 <small>Required(MM/DD/YYYY)</small>	Hire Date 10/31/2023	
Home Phone Number	Work Phone Number	Work Fax Number
Mobile Phone Number	Work Email Address	

Location

Address 01 1901 MARKET ST <small>Required</small>	Address 02	Zip Code 19104 <small>Required</small>
City PHILADELPHIA <small>Required</small>	State Pennsylvania	

[+ Add Dependent](#) [Save](#)

Add or Edit Other Insurance

1. Search for a Member by Group Number/ Member ID/ Last Name.
2. Select click on Subscriber Name hyperlink from the grid.
3. *System loads the Edit Employee page in **Employee details** section.*
4. Click on Coordination of Benefits tab, system displays Additional Insurance information page.
5. Select Other Insurance as Yes for Subscriber followed by Dependent (If applicable) from dropdown list, system will populate the Other Insurance tab for the flow.
6. Enter the Other Insurance and ensure update all required fields (Name of Other Insurance Carrier, Group Number, Policy Number, Policy Holder Legal First Name, Policy Holder Legal Last Name, Effective Coverage Date, Effective Cancel Date, Policy Number, Policy Holder Relation to Subscriber, Policy Holder Birth Date, Policy Holder Employment Status, Policy Holder Type(s) of coverage.) are completed.
7. Click the Save button.

- If changes are successful, a success message displayed as **“Employee Information Updated Successfully”**.

Image: 12.1 - Edit Flow: Coordination of Benefits – Other Insurance

The screenshot shows a web application interface for managing employee benefits. At the top, there is a navigation bar with links for Home, Enrollment, Client/Group Management, Billing, Documents, Resources, and News. Below this is a user profile bar for JOHN DOE, showing Member ID: 5151, SSN: *****6789, Group: 1030, and Status: Active. A 'Download' button is also present. The main navigation menu includes Employee Details, Coverage, ID Cards, Spending Accounts, Coordination of Benefits (highlighted), and Summary of Benefits and Coverages. A note states: "Note: Other insurance or Medicare information submitted for Subscriber's and dependent(s) will take additional processing time and will be updated once the system has completed processing the information. We appreciate your patience while you wait for the system to display the most recently updated information. Kindly revisit this page at a later time." The main form area is titled "JOHN DOE" and contains two dropdown menus: "Other Insurance" (set to "Yes") and "Medicare Eligible?" (set to "Unknown"). Below these is the "Other Insurance" section, which includes a message: "You selected that you have other insurance. Please provide details below." This section contains several input fields: "Name of Insurance Carrier" (Required), "Group Number" (Required), "Policy Number" (Required), "Policy Holder Legal First Name" (Required, Letters, Hyphen() & Apostrophe() Allowed), "Policy Holder Legal Last Name" (Required, Letters, Hyphen() & Apostrophe() Allowed), "Policy Holder Birth Date" (Required, MM/DD/YYYY), "Policy Holder Relation to Subscriber" (Required), "Policy Holder Employment Status" (Required), "Policy Type(s) of Coverage" (Required), "Effective Coverage Date" (Required), and "Effective Cancel Date" (Required). At the bottom right of the form is a "Save" button, and at the bottom left is a "View Other Insurance and Medicare History" button.

Add or Edit Medicare Information

- Search for a Member by Group Number/ Member ID/ Last Name.
- Select Edit click on Subscriber Name hyperlink from the grid.
- System loads the Edit Employee page in **Employee details** section.
- Click on Coordination of Benefits tab, system displays Additional Insurance information page.
- Select Medicare Eligible as Yes for Subscriber followed by Dependent (If applicable) from dropdown list, system will populate the Medicare tab for the flow.

6. Enter the Medicare Eligible information and ensure update all the required fields (Medicare Claim Number, Reason you are Eligible? Current Employment status, Ever Collected Social Security Disability Income?, Medicare Part A (Hospital Insurance) – Effective Date and Cancel Date, Medicare Part B (Medical Insurance) – Effective Date and Cancel Date, Medicare Part C – Medicare Advantage? (Medicare Replacement), Medicare Part D? (Prescription Drug) are completed.
7. Click the Save button.
8. If changes are successful, a success message displayed as **“Employee Information Updated Successfully”**.
9. User can also view Other Insurance and Medicare History Information if applicable at the bottom of the page by clicking on **Other Insurance and Medicare History** button.
10. System displays Other Insurance and Medicare History Information if applicable.

Image: 12.2 - Edit Flow: Coordination of Benefits – Medicare

Medicare

You selected that you are Medicare Eligible. Please provide details below.

<input type="text" value="Medicare Claim Number"/> <small>Required</small>	<input type="text" value="Reason you are eligible?"/> <small>Required</small>
<input type="text" value="Current Employment Status"/> <small>Required</small>	
Ever Collected Social Security Disability Income? <input type="radio"/> Yes <input type="radio"/> No	
Medicare Part A (Hospital Insurance)	
<input type="text" value="Effective Date"/> <small>Required</small>	<input type="text" value="Cancel Date"/>
Medicare Part B (Medical Insurance)	
<input type="text" value="Effective Date"/> <small>Required</small>	<input type="text" value="Cancel Date"/>
Medicare Part C - Medicare Advantage? (Medicare Replacement) <input type="radio"/> Yes <input type="radio"/> No	
Required Medicare Part D? - (Prescription Drug) <input type="radio"/> Yes <input type="radio"/> No <small>Required</small>	

[View Other Insurance and Medicare History](#)

Add New Dependents and Assign Plan Coverage to New Dependents

Add New Dependent(s):

1. *If no dependents are added to the subscriber, then the system will show “**No dependents currently associated with this account**” in Employee Details Section.*

Image: 12.3 - Edit Flow: Add Dependents

Employee Details

Subscriber Information

Prefix	Legal First Name VALICIA <small>Required</small>	Legal Middle Name
Legal Last Name AVINDTON <small>Required</small>	Suffix	Gender Female
Date of Birth (DOB) 7/1/1994 <small>Required (MM/DD/YYYY)</small>	Hire Date 7/13/2020	
Home Phone Number	Work Phone Number 800-048-0731	Work Fax Number 800-764-2264
Mobile Phone Number 800-571-6260	Work Email Address	

Location

Address 01 2652 ZAVALLA ROAD <small>Required</small>	Address 02 A-7	Zip Code 16502 <small>Required</small>
City ERIE <small>Required</small>	State Pennsylvania	

[+](#) Add Dependent

[Save](#)

No dependents currently associated with this account

2. Click Add dependent button to add new members under the subscriber information.
3. Search for a Member by Group Number/ Member ID/ Last Name.
4. Click on Subscriber Name hyperlink from the grid.
5. System loads the Edit Employee page in **Employee Details** section.
6. Click **Add Dependent** button, system loads Dependent Management tab.
7. Enter all required fields for the dependents (Prefix, Legal First Name, Legal Middle Name, Legal Last Name, Suffix, Gender, Birth date, Relationship to Subscriber, Special Status).
8. Click Save button to save the Dependent information.
9. If changes are successful, a success message displayed as **“Employee Information Updated Successfully”**.

Image: 12.4 - Edit Flow: Add Dependents Screen

The screenshot shows a web interface for adding a dependent. At the top left, there is a blue button with a plus sign and the text 'Add Dependent'. Below this, a card titled 'Dependent 1' is displayed. In the top right corner of the card, there is a trash icon and the text 'Delete'. The main content area is titled '0 Information' and 'Personal Information'. It contains several input fields: 'Prefix' (dropdown), 'Legal First Name' (text input, required, with a note 'Required(Alphabets, Hyphen(-) & Apostrophe(') Allowed)'), 'Legal Middle Name' (text input), 'Legal Last Name' (text input, required, with a note 'Required(Alphabets, Hyphen(-) & Apostrophe(') Allowed)'), 'Suffix' (dropdown), 'Gender' (dropdown), 'Birth Date' (calendar icon, required, with a note 'Required(mm/dd/yyyy)'), 'Relationship to Subscriber' (dropdown, required), and 'Special Status' (dropdown, required).

Assign Plan Coverage to New Dependents

10. In the Coverage section, on each plan coverage, select the available plans (Medical Plan Election, Dental Plan Election, Vision Plan Election, Drug Plan Election and Service Plan Election) whichever is applicable for the Dependent(s) from dropdown list. If there are no Plans available for the LOB, it will be greyed out.
11. Enter Effective Date and select Enrollment Members (Dependents) applicable for respective Plans (Medical Plan Election, Dental Plan Election, Vision Plan Election, Drug Plan Election and Service Plan Election).
Important! If an individual's checkbox is not checked, he/she will not receive coverage.
12. If there is other information needed, additional sections will display as well. Complete the information.
13. If an existing dependent doesn't have coverage, you can select the checkbox next to their name to assign coverage now.
14. Click the Save button.
15. If changes are successful, a success message displayed as "**Employee Information Updated Successfully**".

Image: 12.5 - Edit Flow: Add Coverage

Home Enrollment Client/Group Management Billing Documents Resources News

Name: TESTING USER Member ID: 515192544001 SSN: *****4887 Group: 10308537 Status: Active Download

Employee Details Coverage ID Cards Spending Accounts Coordination of Benefits Summary of Benefits and Coverages

Coverage

All of an employee's and their dependents coverage are shown below.

	Group Number	Status	Member	Product Name	Plan Type	Effective Date	Coverage Category Code
<input type="checkbox"/>	10308537	Active	TESTING USER	Premier Advantage 023 5013	VISION	10/10/2023	IND
<input type="checkbox"/>	10308545	Active	TESTING USER	IBC Freestanding Drug Select...	DRUG	10/10/2023	IND

1 to 2 of 2 Page 1 of 1

[+ Add Additional Coverage](#) [- Cancel Coverage](#) [↺ Reinstatement Coverage](#) [📄 Update Report Codes](#) [🕒 Plan Coverage History](#)

Disclaimer*: If you cancelled the members using group to group as cancel reason code. Please select reinstate and add coverage to the group you wish to transfer the members to once the cancellation is successful.

Plan Coverage

Select a plan and assign it to the subscriber and dependents as needed.

Please Note: If you do not see plan options to select, please check and correct the subscribers zip code. Plan availability is based on zip code. Please contact customer service for assistance.

Medical Plan Election

Medical Plan Effective Date

Required Required (MM/DD/YYYY) Required

Vision Plan Election

Vision Plan Required

None

Effective Date Required (MM/DD/YYYY)

11/3/2023

Select Individuals for Enrollment Required

Select Individuals for Enrollment

Dental Plan Election

Dental Plan Required

None

Effective Date Required (MM/DD/YYYY)

11/3/2023

Select Individuals for Enrollment Required

Select Individuals for Enrollment

Drug Plan Election

Drug Plan Required

None

Effective Date Required (MM/DD/YYYY)

11/3/2023

Select Individuals for Enrollment Required

Select Individuals for Enrollment

Service Plan Election

Service Plan Required

None

Effective Date Required (MM/DD/YYYY)

11/3/2023

Select Individuals for Enrollment Required

Select Individuals for Enrollment

Save

Assign Provider to New or Existing Dependents

16. Based on Plan coverage election, this step is applicable. *If a new dependent is added during the edit workflow, provider selection will be displayed for the newly added member in the Provider Management tab.*
17. Enter *Provider Name, Provider Number, Select Established Patient (drop down) and Effective date (pre-populated based on coverage effective date).*
18. Click the Save button.
19. If changes are successful, a success message displayed as ***“Employee Information Updated Successfully”***.
20. Based on Plan coverage election, this step is applicable. If an existing dependent doesn't have Provider, select the provider selection to assign Provider in Provider Management tab.
21. Enter *Provider Name, Provider Number, Select Established Patient (drop down) and Effective date (pre-populated based on coverage effective date).*
22. Click the Save button.
23. If changes are successful, a success message displayed as ***“Employee Information Updated Successfully”***.
24. If you are changing a PCP from a previous coverage, the selection will auto-populate for all family members previously covered.
25. Validate *Provider Name, Provider Number, Select Established Patient (drop down) and Effective date (pre-populated based on coverage effective date).*
26. Click the Save button.

- 27. If changes are successful, a success message displayed as **“Employee Information Updated Successfully”**.

Image: 12.6 – Edit Flow: Provider Management

The screenshot shows a web application interface for Provider Management. At the top, there is a navigation bar with 'Logo' on the left and 'Language Assistance' and 'Support' on the right. Below this is a main navigation menu with links for 'Home', 'Enrollment', 'Client/Group Management', 'Reporting', 'Vendors', 'Documents', 'Resources', and 'News'. A 'BA' button is visible in the top right corner. A light blue header bar displays member information: 'Name: BRIAN', 'Member ID: 1230', 'SSN: ****6778', 'Group: 106', and 'Status: Active', along with a 'Download' button. Below the header is a secondary navigation menu with tabs for 'Employee Details', 'Coverage', 'ID Cards', 'Provider Management' (which is selected), 'Spending Accounts', 'Coordination of Benefits', and 'Summary of Benefits and Coverages'. The main content area is titled 'Provider Selection' and contains the following text: 'In order to select a Provider for this coverage please search for the practice in the [Provider Directory](#) or enter the practice's Provider Number and Name. If you are changing a PCP from a previous coverage, the selection will auto-populate for all family members previously covered.' Below this text is a form with the following fields: 'BRIAN's Provider', 'Group Number - 106', 'Provider Number 0028', 'Provider Name', 'Effective Date 10/26/2023', 'Existing Patient Indicator No', and 'Reason Initial PCP Selection'. A 'Change PCP' button is located at the bottom of the form.

Edit Coverage

- Coverage details are displayed *in grid format with Group Number, Status of coverage, Member Name, The product Name, Plan Type, Effective date, and Coverage Category Code.*
- Coverage details are also displayed as single row per Lob/per subscriber.
- Coverage details of subscriber LOBs will be displayed followed by dependents in the alphabetical order.

Important! If you don't have modify access permissions for a group, checkboxes will not be displayed. You must contact your administrator to have your permissions changed.

Coverage Tab will have **Three** buttons

- a) Add Coverage
- b) Cancel Coverage
- c) Reinstate Coverage

Image: 13 – Edit Flow: Coverage

Logo Language Assistance Support

Home Enrollment Client/Group Management Billing Documents Resources News SS

Name: JOHN DOE Member ID: 515191024001 SSN: *****6789 Group: 10308537 Status: Active [Download](#)

Employee Details **Coverage** ID Cards Spending Accounts Coordination of Benefits Summary of Benefits and Coverages

Coverage

All of an employee's and their dependents coverage are shown below.

Group Number	Status	Member	Product Name	Plan Type	Effective Date	Coverage Category Code
10308537	Active	JOHN DOE	PPO Program without Drug N...	MEDICAL	12/01/2023	IND
10308540	Active	JOHN DOE	Premier Advantage 023 5013	VISION	12/01/2023	IND

1 to 2 of 2 Page 1 of 1

[+ Add Additional Coverage](#) [- Cancel Coverage](#) [↺ Reinstate Coverage](#) [+ Update Report Codes](#) [↺ Plan Coverage History](#)

Disclaimer*: If you cancelled the members using group to group as cancel reason code. Please select reinstate and add coverage to the group you wish to transfer the members to once the cancellation is successful

Edit Coverage:

1. Search for a Member by Group Number/ Member ID/ Last Name.
 2. Click on Subscriber Name hyperlink from the grid.
 3. System loads the Edit Employee page in Employee details section.
 4. Click on Coverage tab, system loads the Coverage page.
 5. Click on **Add Additional Coverage Button**, system will redirect to Coverage Selection Tab of Add New Enrollment Flow.
 6. On each plan coverage section, select the available plans (Medical Plan Election, Dental Plan Election, Vision Plan Election, Drug Plan Election and Service Plan Election) whichever is applicable for the Subscriber and Dependents from dropdown list. If there are no Plans available for the LOB, it will be greyed out.
 7. Enter Effective Date and select Enrollment Members (Subscriber & Dependents) applicable for respective Plans (Medical Plan Election, Dental Plan Election, Vision Plan Election, Drug Plan Election and Service Plan Election).
- Important! If an individual's checkbox is not checked, he/she will not receive coverage.**

8. If applicable, Act4, Report Codes and Tobacco Status section will display once you select coverage. If there is other information needed, additional sections will display as well. Complete the information.
9. Click the Save button.
10. If changes are successful, a success message displayed as **“Employee Information Updated Successfully”**.

Image: 14 - Edit Flow: Add Coverage

Plan Coverage

Select a plan and assign it to the subscriber and dependents as needed.

Please Note: If you do not see plan options to select, please check and correct the subscribers zip code. Plan availability is based on zip code. Please contact customer service for assistance.

Medical Plan Election

Medical Plan None	Effective Date 11/7/2023	Select Individuals for Enrollment
Required	Required (MM/DD/YYYY)	Required

Vision Plan Election

Vision Plan None	Effective Date 11/7/2023	Select Individuals for Enrollment
Required	Required (MM/DD/YYYY)	Required

Dental Plan Election

Dental Plan None	Effective Date 11/7/2023	Select Individuals for Enrollment
Required	Required (MM/DD/YYYY)	Required

Drug Plan Election

Drug Plan None	Effective Date 11/7/2023	Select Individuals for Enrollment
Required	Required (MM/DD/YYYY)	Required

Service Plan Election

Service Plan None	Effective Date 11/7/2023	Select Individuals for Enrollment
Required	Required (MM/DD/YYYY)	Required

Save

Cancel Coverage:

System displays the Cancel Coverage button only if user is active.

1. Search for a Member by Group Number/ Member ID/ Last Name.
2. Click on Subscriber Name hyperlink from the grid.
3. System loads the Edit Employee page in Employee details section.
4. Click on Coverage tab, system loads the Coverage page.
5. Selects the row of (Subscriber / Dependent) in the grid.
6. Click on Cancel coverage button.
7. System displays Cancel Coverage section.
8. Select Cancel date.
9. Select coverage to be cancelled with cancel reason from dropdown list.
10. Click Yes on the warning message to proceed with cancel.
11. System displays confirmation message.

Image: 14.1 - Edit Flow: Cancel Coverage

The screenshot displays the 'Coverage' page for a member named JOHN DOE. The page features a navigation bar with tabs for Employee Details, Coverage, ID Cards, Spending Accounts, Coordination of Benefits, and Summary of Benefits and Coverages. Below the tabs, a table lists the coverage details:

Group Number	Status	Member	Product Name	Plan Type	Effective Date	Coverage Category Code
<input type="checkbox"/> 10308537	Active	JOHN DOE	PPO Program without Drug N...	MEDICAL	12/01/2023	IND
<input type="checkbox"/> 10308540	Active	JOHN DOE	Premier Advantage 023 5013	VISION	12/01/2023	IND

Below the table, there are several action buttons: 'Add Additional Coverage', 'Cancel Coverage' (highlighted with a red box), 'Reinstate Coverage', 'Update Report Codes', and 'Plan Coverage History'. A disclaimer is visible at the bottom of the main content area.

Disclaimer*: If you cancelled the members using group to group as cancel reason code. Please select reinstate and add coverage to the group you wish to transfer the members to once the cancellation is successful

Image: 15 - Edit Flow: Cancel Coverage

The image shows a web form titled "Cancel Coverage". At the top, there is a warning message: "Warning! You are about to cancel selected coverage for the selected people. You can add coverage later if you need." Below this, there are two input fields: "Cancel Date" (with a calendar icon and a "Required (MM/DD/YYYY)" label) and "Cancel Reason" (with a dropdown arrow and a "Required" label). Below these fields are two buttons: "Discard" (red) and "Submit" (blue). The "Cancel Reason" dropdown menu is open, showing a list of options: "LEFT EMPLOYMENT - NO LONGER ELIGIBLE FOR COVERAGE (01)", "VOID", "TRANSFER (GROUP TO GROUP)", "MILITARY SERVICE (05)", "DECEASED (06)", and "RETIRED - NOT ELIGIBLE FOR GROUP COVERAGE (07)". At the bottom of the form, there is a blue navigation bar with several menu items: "Enrollment", "Client & Group Management", "Reporting", "Wellness Incentive", "Contact", and "For issues with user setup, membership questions and questions regarding...".

Canceling Spending Account

Selecting the Cancel Spending Account button navigates to the Spending Account Elections page.

1. System display Cancel Spending Account option for spending account groups
2. Users select Spending Account and clicks on Cancel coverage.
3. The system displays the Manage Spending Account Elections page with any spending account options that need to be cancelled.

Reinstate Coverage:

1. Search for a Member by Group Number/ Member ID/ Last Name.
2. Click on Subscriber Name hyperlink from the grid.
3. System loads the Edit Employee page in Employee details section.
4. Click on Coverage tab, system loads the Coverage page.
5. Selects the row of Cancelled (Subscriber / Dependent).
6. Click on Reinstate Coverage button.
7. System displays the Reinstate Coverage section.
8. Select Coverage effective date and click Continue.
9. System will be redirected to add new enrollment workflow with employee information pre-populated. At this time, information can be edited or added to reflect the current request.
10. Follow the Add Employee process to complete and reinstate the enrollment.

Image: 16 - Edit Flow: Reinstate Coverage

The screenshot displays the 'Coverage' section of a web application. At the top, there is a navigation bar with 'Logo' on the left and 'Language Assistance' and 'Support' on the right. Below this is a secondary navigation bar with links for 'Home', 'Enrollment', 'Client/Group Management', 'Billing', 'Documents', 'Resources', and 'News'. A user information bar shows 'Name: TESTING USER', 'Member ID: 515192544001', 'SSN: ****4887', 'Group: 10308537', and 'Status: Cancelled', along with a 'Download' button. The main navigation tabs include 'Employee Details', 'Coverage', 'Spending Accounts', 'Coordination of Benefits', and 'Summary of Benefits and Coverages'. The 'Coverage' tab is active, showing a table of coverage records. The table has columns for 'Group Number', 'Status', 'Member', 'Product Name', 'Plan Type', 'Effective Date', and 'Coverage Category Code'. Two rows are visible, both with a 'Cancelled' status. Below the table is a pagination control showing '1 to 2 of 2' and 'Page 1 of 1'. At the bottom, there are several buttons: 'Add Additional Coverage', 'Cancel Coverage', 'Reinstate Coverage' (highlighted with a red box), 'Update Report Codes', and 'Plan Coverage History'. A disclaimer at the very bottom reads: 'Disclaimer** If you cancelled the members using group to group as cancel reason code. Please select reinstate and add coverage to the group you wish to transfer the members to once the cancellation is successful.'

Group Number	Status	Member	Product Name	Plan Type	Effective Date	Coverage Category Code
10308537	Cancelled	TESTING USER	Premier Advantage 023 5013	VISION	10/10/2023	IND
10308545	Cancelled	TESTING USER	IBC Freestanding Drug Select...	DRUG	10/10/2023	IND

Image: 16.1 - Edit Flow: Reinstate Coverage

Home Enrollment Client/Group Management Billing Documents Resources News SS

Add Employee

- Subscriber Identification Required
- Dependent Management
- Plan Coverage Election Required
- Provider Selection
- Coordination of Benefits Required
- Review & Submit Required

Subscriber Dates

Employee Hire Date: 10/1/2023 (MM/DD/YYYY)

Coverage Effective Date: 10/1/2023 (MM/DD/YYYY)
Required (MM/DD/YYYY)
Select carefully. This is the first day that any coverage will be available.
Please note: The effective date must adhere to the new hire eligibility guidelines established by your company. Failure to adhere to these guidelines will result in delayed enrollments.

Personal Information

Prefix: [dropdown]

Legal First Name: test (Required (Letters, Hyphen(-) & Apostrophe(') Allowed))

Legal Middle Name: [text box]

Legal Last Name: member (Required (Letters, Hyphen(-) & Apostrophe(') Allowed))

Suffix: [dropdown]

Gender: Male (Required)

Birth Date: 10/2/1987 (Required (MM/DD/YYYY))

Social Security Number(SSN): ***-**-8678 (Required (123-45-6789))

Confirm Social Security Number(SSN): ***-**-8678 (Required (123-45-6789))

Location

Address 01: 1901 Market St (Required)

Address 02: [text box]

Zip Code: 19104 (Required)

City: philadelphia (Required)

State: Pennsylvania (Required)

ID Cards

User can view, Order and print ID cards for employee and dependents. Virtual ID cards are available at the first day of coverage. User can also request replacement ID cards on behalf of your employees.

An ID card can be mailed to the employee address on file or another address without replacing the address on file.

1. Search for a Member by Group Number/ Member ID/ Last Name.
2. Click on Subscriber Name hyperlink from the grid.
3. System loads the Edit Employee page in Employee details section.
4. Click on ID Cards tab, system loads the Subscriber/Dependent ID Cards page.
5. Member ID card is displayed.
6. Select Member (Subscriber/Dependent Name) from dropdown list.
7. Select applicable plans (Medical/Dental/Vision).
8. All the Employee (Subscriber & Dependents) Virtual ID cards including front and back loads *is displayed.*
9. Click Order button to Order the ID card for a Subscriber/Dependent.
10. Order ID cards Popup Page displayed.
11. Select the member (Subscriber/Dependent Name) and plan type(s) for the card you would like to order using dropdown and click on checkbox.
12. Verify mailing address.
13. Click on Submit Order Button for Ordering the ID cards.
14. A Successful Message Pop up as "Thanks, your Order Placed Successfully".
15. Print the ID card button by clicking the Print button on bottom right side.
16. Click on Report *button on bottom left side to get the Customer support information.*

Image: 17 – ID Cards: Print and Request ID Cards

Language Assistance Support

Home Enrollment Client/Group Management Billing Documents Resources News SS

Name: TESTING USER Member ID: 515192544001 SSN: *****4887 Group: 10308537 Status: Active [Download](#)

Employee Details Coverage **ID Cards** Spending Accounts Coordination of Benefits Summary of Benefits and Coverages

Subscriber / Dependent ID cards

TESTING USER [Order ID Card](#)

Drug Vision

Ballantyne

TESTING USER
515192544001 Group: 10308537
Rx BIN: 01801 4
Rx PCN: 06090000

Rx

Pharmacy Benefits
1 888 678 7012

[Print](#)

Find a Provider

Find a Provider can be found in the E-Spot section of the Homepage.

Image: 17 – Find a Provider: E-Spot

Recent Enrollment Activity

The following list includes enrollments that are pending because they are in a 'Saved', 'Partially-Submitted' or 'Submitted' state. Partially-Submitted and Submitted states will take 24 hours for the enrollment to be complete.

Subscriber First Name	Subscriber Last Name	SSN	Status	Last Updated
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
No Rows To Show				
0 to 0 of 0 << < Page 0 of 0 > >>				

Find a Provider

Help your employees find an in-network provider in their area.

[Learn More](#)

Processing Guidelines

Know the rules about future and retroactive dating, new dependents, and which products are supported

[Learn More](#)

Retroactive Policy

Find out exactly how retroactive terminations apply to various groups, as well as retro adds/changes.

[Learn More](#)

Glossary of Health Coverage

This glossary helps make sense of health care with

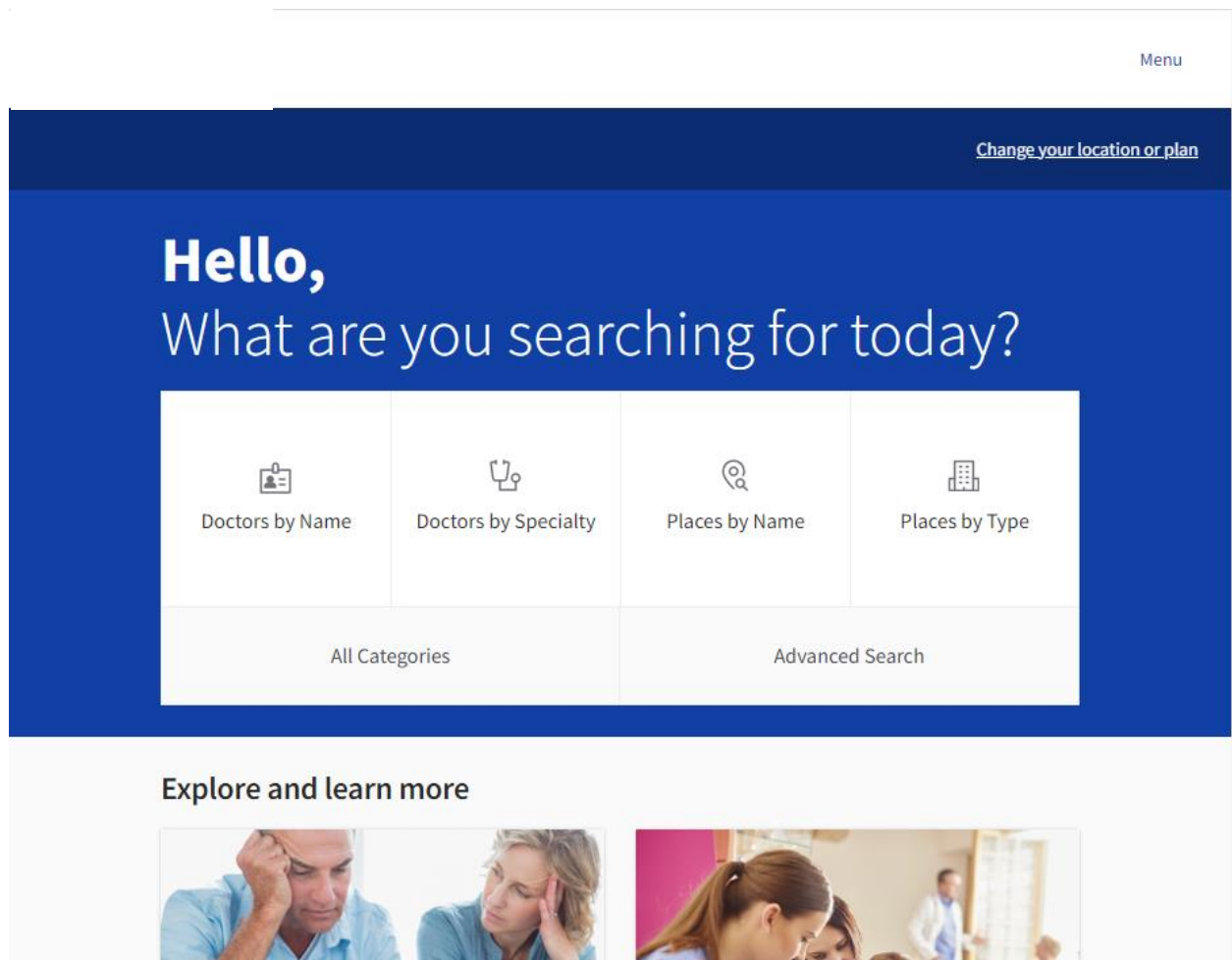
Training/FAQs

Learn how to use the Employer Portal to complete

Wellness Guidelines

Share this with employees! It contains preventive

Image: 18 – Edit Flow: Find a Provider



Change Primary Care Physician (PCP)

User can change the PCP for employee and dependents. This option is not applicable for a cancelled employee.

1. Search for a Member by Group Number/ Member ID/ Last Name.
2. Click on Subscriber Name hyperlink from the grid.
3. System loads the Edit Employee page in Employee details section.
4. Click on Provider management Tab.
5. Enter a new Provider Number and Provider Name or click Search Provider Directory to search for a provider.
6. Select a Reason and the Effective Date will be populated based on the reason selected.
7. Click the Save to submit the changes.
8. If changes are successful, a success message displayed as ***“The PCP was successfully updated”***.

Image: 19 - Edit Flow: Change PCP

The screenshot displays a web application interface for managing employee details. At the top, there is a navigation bar with a logo on the left and 'Language Assistance' and 'Support' on the right. Below this is a secondary navigation bar with links for 'Home', 'Enrollment', 'Client/Group Management', 'Reporting', 'Vendors', 'Documents', 'Resources', and 'News'. A blue bar below the navigation contains member information: 'Name: BRIAN', 'Member ID: 12301', 'SSN: ****6778', 'Group: 106', and 'Status: Active', along with a 'Download' button. A horizontal menu below this bar includes 'Employee Details', 'Coverage', 'ID Cards', 'Provider Management' (highlighted with a red box), 'Spending Accounts', 'Coordination of Benefits', and 'Summary of Benefits and Coverages'. The main content area is titled 'Employee Details' and 'Subscriber Information'. It contains several input fields: 'Prefix' (dropdown), 'Legal First Name' (text, value: BRIAN), 'Legal Middle Name' (text), 'Legal Last Name' (text), 'Suffix' (dropdown), 'Gender' (dropdown, value: Male), 'Date of Birth (DOB)' (calendar, value: 9/12/1989), 'Hire Date' (calendar), 'Home Phone Number', 'Work Phone Number', 'Work Fax Number', 'Mobile Phone Number' (with a mute icon), and 'Work Email Address'.

Image: 19.2 - Edit Flow: Change PCP

The screenshot shows a web application interface for managing a member's Primary Care Physician (PCP). The page header includes a logo, navigation links (Home, Enrollment, Client/Group Management, Reporting, Vendors, Documents, Resources, News), and user options (Language Assistance, Support). A member profile bar displays: Name: BRIAN, Member ID: 1230, SSN: ****6778, Group: 106, Status: Active, and a Download button. The main navigation menu includes: Employee Details, Coverage, ID Cards, **Provider Management**, Spending Accounts, Coordination of Benefits, and Summary of Benefits and Coverages. The 'Provider Selection' form is highlighted with a red border. It contains the following information:

BRIAN	's Provider
Group Number	- 106
Provider Number	0028
Provider Name	
Effective Date	10/26/2023
Existing Patient Indicator	No
Reason	Initial PCP Selection

[Change PCP](#)

Spending Accounts

This section allows the user to View and Manage the Spending Account details for an Employee.

Spending Accounts allows the user to view the Balances for all Spending Account Types. However, the HSA and HRA spending account types will be **view only**.

User should have View or Modify entitlement access for spending accounts within the client.

View Spending Accounts:

1. Search for a Member by Group Number/ Member ID/ Last Name.
2. Click on Subscriber Name hyperlink from the grid.
3. System loads the Edit Employee page in Employee details section.
4. Click on Spending Account section.
5. System displays General instructions to follow for all Spending Accounts.

Image: 20 - Edit Flow

Logo Language Assistance Support

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Name: JOHN DOE **Member ID:** 5151 **SSN:** ****6789 **Group:** 103 **Status:** Active [Download](#)

Employee Details Coverage ID Cards **Spending Accounts** Coordination of Benefits Summary of Benefits and Coverages

Spending Accounts

General Instructions:

To modify an election of employee:	Please note:
<ol style="list-style-type: none">1. Select "Update" button2. Go to the correct benefit account(e.g. Medical Account)3. update the fields.4. Click "Save" Button.	<ul style="list-style-type: none">• Not editable: spending account elections if you have view-only access, HRAs, HSA, or Total Annual Contribution.• Total Annual Contribution shows annual amount for annual pay frequencies. Contribution shows year-to-date amount for monthly or weekly pay frequencies.

Manage Spending Account Elections

1. Search for a Member by Group Number/ Member ID/ Last Name.
2. Click on Subscriber Name hyperlink from the grid.
3. System loads the Edit Employee page in Employee details section.
4. Click on Spending Account section.
5. System displays General instructions to follow for all Spending Accounts.

Image: 21 – Edit Flow: Manage Spending Accounts

Spending Accounts

General Instructions:

To modify an election of employee:	Please note:
<ol style="list-style-type: none">1. Select 'Update' button2. Go to the correct benefit account(e.g. Medical Account)3. update the fields.4. Click 'Save' Button.	<ul style="list-style-type: none">• Not editable: spending account elections if you have view-only access, HRAs, HSA, or Total Annual Contribution.• Total Annual Contribution shows annual amount for annual pay frequencies. Contribution shows year-to-date amount for monthly or weekly pay frequencies.

Group Information:

Group Number 1010 **Permission** View & Modify

Note: All Fields are mandatory, if status is in cancelled state begin date not required. [Cancel](#) [Save](#)

FSA Dependent Care	Status	Pay Frequency	Employee Annual contribution	Total Annual contribution
Benefit Start Date <input type="text"/>	Elected	Choose one	Amount	\$ 0.0
<small>Start date should be after 01/01/2022</small>			<small>Please enter valid amount</small>	
Benefit End Date <input type="text"/>				
<small>End date should be before 12/31/2022</small>				

FSA Medical	Status	Pay Frequency	Employee Annual contribution	Total Annual contribution
Benefit Start Date <input type="text"/>	Choose one	Choose one	Amount	\$ 0.0
<small>Start date should be after 01/01/2022</small>			<small>Please enter valid amount</small>	
Benefit End Date <input type="text"/>				
<small>End date should be before 12/31/2022</small>				

Spending Accounts

General Instructions:

To modify an election of employee:	Please note:
<ol style="list-style-type: none">1. Select 'Update' button2. Go to the correct benefit account(e.g. Medical Account)3. update the fields.4. Click 'Save' Button.	<ul style="list-style-type: none">• Not editable: spending account elections if you have view-only access, HRAs, HSA, or Total Annual Contribution.• Total Annual Contribution shows annual amount for annual pay frequencies. Contribution shows year-to-date amount for monthly or weekly pay frequencies.

Group Information:

Group Number: 1040 Permission: View & Modify

Updates successful!

Note: Updates will be reflected on the next business day.

[Update](#)

FSA Dependent Care	Status	Pay Frequency	Employee Annual contribution	Total Annual contribution
01/01/2022 - 12/31/2022	Not yet set	Not yet set	\$ 0.0	\$ 0.0

FSA Medical	Status	Pay Frequency	Employee Annual contribution	Total Annual contribution
01/01/2022 - 12/31/2022	Not yet set	Not yet set	\$ 0.0	\$ 0.0

Group Number: 1040 Permission: View only

Group Number: 1040 Permission: View only

Group Number: 1040 Permission: View only

Client/Group Management Tab

Purpose: This section provides an overview of the Client/Group tabs and how to view and understand the Client and Group details and contacts. Use the Client/Group Management Tab to access the Client Management and Group Management sub menu to get Client and group level information.

Note: It is NOT possible to edit information in the Client/Groups section. Contact your Client Manager if this information requires an update.

Client Management:

Client Management is used to view Client Level information. *Client Management page has below sections*

- Client General Information
- Report Codes (if applicable)
- Client Contacts

View Client Level Information:

1. Select Client/Group Management tab on Homepage Header menu.
2. Click on Client Management sub menu.
3. System displays Client General Information page.
4. View Client General information with below details.

Term	Definition
Renewal Month	Your company's renewal month.
State of Incorporation	The state in which your company is incorporated.
Affiliation	The companies having a common interest above and beyond the purchase of health care.
Payment Mode	The frequency of payments.
Payment Terms	The due date for payments.
Sales Representatives	The names and titles of the sales representatives assigned to your company.
SIC Code & Description	The Standard Industrial Classification (SIC) code assigned to your company. & The type of business.
Report Code	Displays active report codes that are associated with the groups listed. Report codes are only shown if they are applicable to your Client setup.

View Client Contacts:

5. Click Contacts from the top navigation to view client contacts.
6. The Client Contacts page displays contact information about the company's different contact types in grid format.
7. The Report code page displays the report code type and code for associated groups. Report Codes are only shown if they are applicable to the Client's setup.

Image: 22 - Client Management: Client General Info

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Client General Info Client Contacts

Client General Information

Report Codes

Type	Code	Associated Groups
<input type="text"/>	<input type="text"/>	<input type="text"/>
_____	_____	_____
_____	_____	_____

1 to 3 of 3 |< < Page 1 of 1 > >|

Image: 23 - Client Management: Client Contacts

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Group General Info **Group Contacts**

Group Contacts

Contact Type	First Name	Last Name	Phone Number	Email
> Correspondence				
> Send ID Card to Member				
> General				
> Contract Signor				

10 1 to 4 of 4 Page 1 of 1

Group Management

Group Management is used to view Group Level information. The Group General Information displays the basic information about the Group such as anniversary month, sales representatives, payment terms, SIC code and Group Contacts.

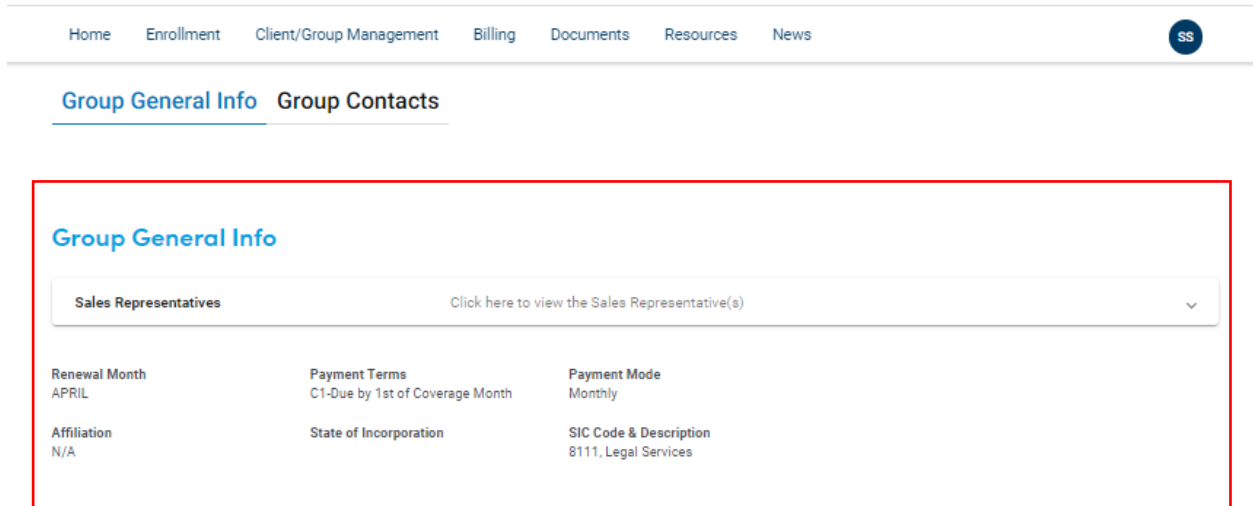
Group Management page has below sections:

- I. *Group General Information*
- II. *Group Contacts*

View Group Level Information:

1. Select Client/Group Management tab on Homepage Header menu.
2. Click on Group Management sub menu.
3. System displays Group Listing page in Grid format contains Group number, Group Name, Status (Active/Cancelled/Future), Renewal Month, Payment Mode, Payment Terms.
4. Group Listing page also displays Count of Total Groups, Active and Cancelled Groups.
5. Click on Group Number from grid to View *individual group information*.
6. System displays Group General information page with below details.
7. *Group Number Individual page has below sections:*
 - a) *Group General Information*
 - b) *Eligibility*

Image: 25 - Group Management: Group General Information



Eligibility

The Group Eligibility displays information about covered dependents, students, and domestic partners under Group General Information.

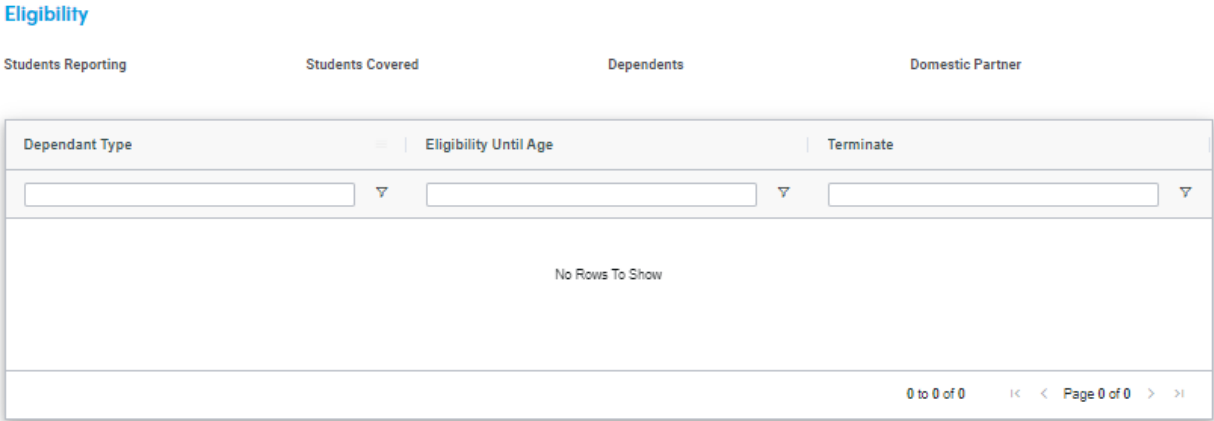
- System displays the Group Eligibility when the group number is clicked – Listed with Yes/No Options.
- The Group Eligibility section displays the following information under Group General Information grid.

Term	Definition
Dependents, Students, & Domestic Partners Covered	<p>Display a green checkmark to the left of the item, they are eligible for (Yes)</p> <p>Display a red cross mark to the left of the item, they are not eligible for (No)</p>
Students Reporting	<p>This explains, as to whether a rule exists for student dependents to report their school status to maintain eligibility under a contract holder's coverage for contract</p> <p>Display a green checkmark to the left of the item, they are eligible for (Yes)</p> <p>Display a red cross mark to the left of the item, they are not eligible for (No)</p>
Dependent Type	Regular, Disabled, or Student

Eligible To Age	The age at which coverage is discontinued for a dependent
Terminate	The rules for when a dependent's coverage terminates

- If the dependent type is yes, system displays each dependent type in grid format in rows contains Dependent Type, Eligible to Age, terminate.

Image: 25.1 – Group Management: Eligibility



Group Products

The Group Products page displays product information and status under Group General Information.

- System displays the Group Products when the group number is clicked under Group General Information.
- System displays both Active and Cancelled Products.
- System displays the following information under Group Products,

Product Name and Status	Eligible products for the group and indicates whether the product is currently active or effective on a future date
Contract Information	This includes the start date, end date of the contract as a date range single Column, contract Period, Renewal Month and Billing method.

Image: 25.2 – Group Management: Products

Products

Title	Description	Status	Contract ...	Contract ...	Next Ren...	Contract ...	Billing Me...
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

10 1 to 3 of 3 Page 1 of 1

Report Codes

The Group Report Code displays active Report Codes that are associated with the selected group. Report Codes are only shown if they are applicable to the Client's setup.

Image: 25.3 – Group Management: Report Codes

Report Codes

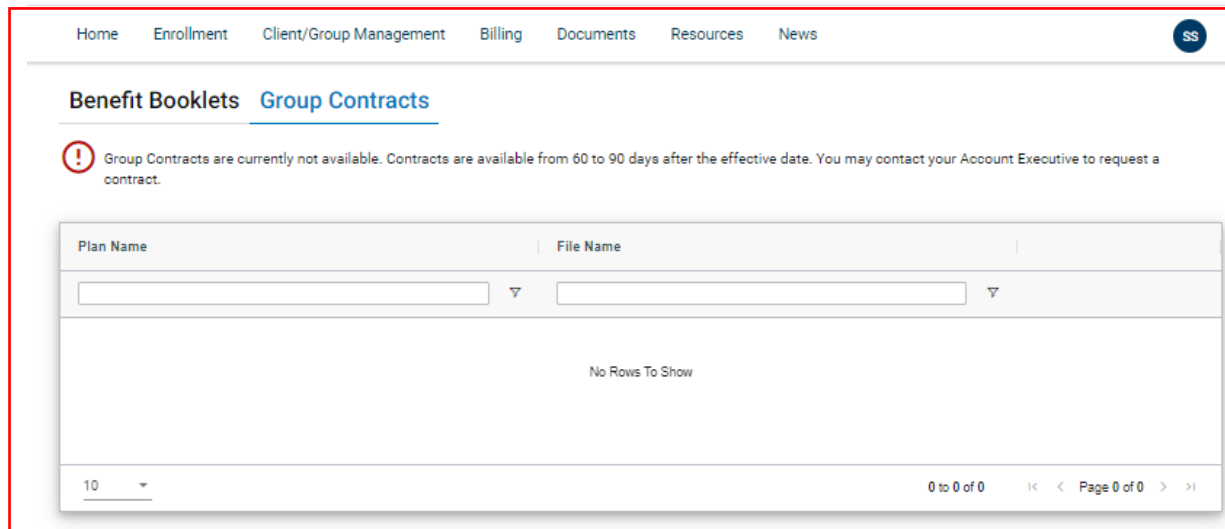
Type	Code
<input type="text"/>	<input type="text"/>

10 1 to 3 of 3 Page 1 of 1

Group Contacts

1. Select Group Contacts from the top navigation to view Group contacts.
2. The Group Contacts page displays contact information such as, names, addresses, phone numbers, fax numbers, e-mail addresses, etc.
3. The Contact Type field describes when the contact is to be used. For example, the group may have Billing contacts, ID Card contacts, Report contacts, etc.

Image: 26 - Group Management: Group Contracts



Billing

This section provides a high-level understanding of the information from the e-Bill system. If you have the entitlement access, the Billing tab enables you to view group invoices online.

1. Select the Billing tab from the Homepage.
2. The e-Bill Welcome page displays.
3. In e-Bill, you can view reports and the prior months' bills.
4. This tab provides a Single Sign-on link to the E-bill application where the plan admins can view the invoices and make payments for the bills received.

The following Sections are available in Billing page:

- a) Current Balance
 - b) Recurring Payments
 - c) Payment Methods
 - d) Provide information on Recent invoices.
-
- a) Current Balance

This section will display any pending dollar amount of the Invoice for the Billing accounts associated to the plan admin/client (total amount will be displayed).

1. Select **Click here to Pay Invoice** button, a pop up **Please Note** message appears.
2. Click on Continue to vendor site, system redirect to new ebill page.

b) Recurring Payments

The Recurring payment set-up is done in the ebill application.

1. Select **Manage Recurring Payments** button, a pop up **Please Note** message appears.
2. Click on Continue to vendor site, system redirect to new ebill page.

c) Payment Methods

The user can set-up the payment method on E-bill for the invoices either through Online, Card or EFT transfer.

1. Select **Manage Payment method** button, a pop up **Please Note** message appears.
2. Click on Continue to vendor site, system redirect to new ebill page.

d) Recent Invoices

This section will provide the last 3 invoice status, Invoice amount and paid status along with Invoice Number and Billing period. A small check box to enable paperless invoice option for the employer is available.

Image: 27 – Billing

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Billing

If you would like to proceed to billing application please click the below button

[Go to Billing](#)

Find the current balance details below

Group Premium	Total amount due: \$0.00
---------------	--------------------------

Documents

This section provides *the list of Documents available for the Client as per their group and LOB.*

Documents has below sections,

1. Benefit Booklets
2. Group Contracts

Benefit Booklets

System displays the benefit booklets available for the Client as per their group and LOB. The benefit document is available from the Benefits system from ICIS benefit system.

1. Select the Documents tab from the Homepage.
2. System displays Benefit documents page.
3. All the Benefit documents are available in hyperlinks.
4. Inserts/Addendums documents is present in hyperlink.
5. Click on each Benefit Document hyperlink, benefit document related to the plan will open in PDF.
6. Each Document is a small downloadable/Printable PDF booklet which comes along with the plan name.
7. A download button is available to download the document.
- 8.

Image 28: Documents: Benefit Booklets

Plan Name	File Name	
<input type="text"/>	<input type="text"/>	
Personal Choice 10308537	GE_10308537_20210401.pdf	↓
Personal Choice 10308538	GE_10308537_20210401.pdf	↓
Personal Choice Flex 10308539	GE_10308539_20210401.pdf	↓
Personal Choice Flex 10308540	GE_10308539_20210401.pdf	↓
Personal Choice 10308541	GE_10308541_20230401.pdf	↓
Personal Choice 10308542	GE_10308541_20210401.pdf	↓
Personal Choice 10308543	GE_10308543_20210401.pdf	↓
Personal Choice 10308544	GE_10308543_20210401.pdf	↓
IBC Freestanding Drug Select 5015 10308545	GE_10308545_20210401.pdf	↓
IBC Freestanding Drug Select 5015 10308546	GE_10308545_20210401.pdf	↓

10 1 to 10 of 14 << < Page 1 of 2 > >>

Summary of Benefits and Coverage

System displays the SBC documents available for the Client as per their group and LOB.

1. Select the Documents tab from the Homepage.
2. System displays Benefit Booklets page.
3. Click on Summary of Benefits and Coverage section.
4. System displays Summary of Benefits and Coverage page.
5. *All the SBC Documents are available in Hyperlinks.*
6. *Clicks on each SBC Document hyperlink, document will open in PDF.*
7. *Each Document is a small downloadable/Printable PDF booklet which comes along with the plan name.*
8. *A download button is available to download the document.*

Group Contracts

1. Select the Contracts tab from the Homepage.
2. System displays Contracts page with the Total Pending Agreement status.
3. Select **Click Here Review Agreements** Button on Pending Agreements section, **Please Note** pop up message appears.
4. Click on **Continue to vendor Site** button, system will be directed to the application.
5. Contracts Page has Two additional sections,
 - a. Create Agreement – To Create Agreement for the client account
 - b. Create Request – To Create Request for the client account
6. Click on Proceed to Create vendor Agreement to Create an Agreement for client account.
7. **Please Note** pop up message appears, Click on **Continue to vendor Site** button, system will be directed to the application.
8. Click on Proceed to Create Request button to or create a request for the client account.
9. **Please Note** pop up message appears, Click on **Continue to vendor Site** button, system will be directed to the application.

Group Contracts

System displays the Group Contracts documents available for the Client as per their group and LOB. User should be able to view Group Contracts for the group only if they have view or modify access for the group.

1. Select the Documents tab from the Homepage.
2. System displays Benefit Documents page.
3. Click on Group Contracts section.
4. System displays Group Contracts Terms and Conditions page.
5. Click checkbox of Terms and conditions page, system displays the Group Contracts.
6. *All the Group Contracts documents are available in Hyperlinks.*
7. *Rider documents is also available in Hyperlinks.*
8. *Clicks on each Group Contract document hyperlink, document will open in PDF.*
9. *Each Document is a small downloadable/Printable PDF booklet which comes along with the plan name and group number.*
10. *A download button is available to download the document.*

Resources

This section provides an overview of the Resources user can access. *If users have entitlement, can view, and utilize all the features of resources tab.*

User can access the below list from Resources tab.

- a) Forms and Applications
- b) Group Bulletins
- c) Helpful Information

Forms and Applications

Forms and Applications page is displayed with hyperlinks to all forms related to Health plans. This feature is common for all Plan partners. User can access this page if the client is Currently active and has been cancelled in ICIS within last 6 months.

1. Select the Resources tab from the Homepage.
2. Click on Forms and Applications section.
3. System displays Forms and Applications Page.
4. *Clicks on different forms available for plan and enrollment related services.*
5. *Clicks on Form and Applications hyperlink, the document will open in PDF format.*
6. All the forms are downloadable PDF formats and can be printed

Different kind of Forms links available are:

Form Names	Purpose of Form
HMO member change Form	Form used by the member to report changes in their address, status, or dependents in the HMO product
Member Change Form	The form used to communicate changes in a member's address, status or dependents
HIPAA Authorization Form	Authorization for Disclosure of Health Information. Members should use this form to designate who is authorized to view their protected health information.
RX request Form	Use this form to request coverage for a non-formulary prescription drug.
Specialty RX request Form	If your employees need one of the specialty drugs on this list, they'll need to have their doctor complete this form for prior authorization.
Dental Claim Form	Employees should use the Dental Claim Form for a dentist's pre-treatment estimate or statement of actual services.
Blue Account HRA Direct Deposit Form	Authorization Form to have claim reimbursement sent directly to their bank account.
Waiver Insurance Form	If your employees decide to waive health care coverage through your Group's plan, please have them complete the Waiver of Insurance form

Different Applications available are below,

Applications	Purpose
Small Group Enrollment Application	This form is used to enroll in all non-HMO group health care coverage.
Large Group Enrollment Application	This form is used to enroll in all non-HMO group health care coverage.
HMO Enrollment Application	Application for enrolling employees and their dependents in HMO product.
USERRA application	Uniformed Services Employment and Re-Employment Rights Act of 1994 (USERRA)

Group Procedures for USERRA	A helpful guide in answering questions for administrators about USERRA and USERRA procedures.
-----------------------------	---

Image: 29 – Resources: Forms and Applications

[Home](#) [Enrollment](#) [Client/Group Management](#) [Billing](#) [Documents](#) [Resources](#) [News](#)
SS

Forms And Application

Helpful Information

Below are electronic versions of the forms most commonly used for administering your benefit plan.

[Autism Claim Form](#)
This claim form is used for prescriptions for the treatment of Autism Spectrum Disorders (ASD).

[Diabetic Medication and Supplies Claim Form](#)
Form is used for prescriptions for diabetic medications and supplies.

[Disabled Dependent Form](#)
The member and the attending physician must complete this form to certify a dependent's disabled status.

[Enrollment Application](#)
This form is used to enroll in all non-HMO group health care coverage

[HCR Preventive Drug Claim Form](#)
HCR members should use this form to get reimbursed when they pay for preventive prescription drugs out of pocket.

[Influenza Vaccine Reimbursement Form](#)
Form used for members who receive a flu shot in a non-participating location.

[Medical Claim Form](#)
Form is used when members use a non-network provider who does not submit claim form for them.

[Member Change Form](#)
The form used to communicate changes in a member's address, status or dependents.

[HIPAA Authorization](#)
Authorization for Disclosure of Health Information. Members should use this form to designate who is authorized to view their protected health information.

[Rx Request Form](#)
Use this form to request coverage for a non-formulary prescription drug.

Helpful Information

Helpful Information provides answers to common benefit plan questions.

1. Select the Resources tab from the Homepage.
2. Click on Helpful Information section.
3. System displays Helpful Information Page.
4. Clicks on Helpful Information hyperlink, more information links that is available is displayed.

Helpful Information can access the below Hyperlinks,

- a) Benefit Coordination
- b) Brochures and Information
- c) Employee Help and Information
- d) Enrollment Information

a) Benefit Coordination

Most group health care programs contain a coordination of benefits (COB) provision. This provision is used when the employee, the employee's spouse or their covered dependents are eligible for payment under more than one health program. The object of coordination of benefits is to assure that your employees covered expenses will be paid, while preventing duplicate benefit payments.

b) Brochures and Information

Distribute the information found in these links via your company's intranet site or company bulletin boards to help your employees understand their benefits.

c) Employee Help and Information

Get answers to common benefit questions your employees ask you.

d) Enrollment Information

This section will explain the various aspects of administering your benefit plan's enrollment.

Image: 30 - Resources: Helpful Information

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Forms And Application [Helpful Information](#)

[Helpful Information](#)

This section will explain the various aspects of administering your benefit's plan enrollment.

[Benefit Coordination](#)

Most group health care programs contain a coordination of benefits (COB) provision. This provision is used when the employee, the employee's spouse or their covered dependents are eligible for payment under more than one health program. The object of coordination of benefits is to assure that your employees covered expenses will be paid, while preventing duplicate benefit payments.

[Brochures and Information](#)

Distribute the information found in these links via your company's intranet site or company bulletin boards to help your employees understand their benefits.

[Employee Help and Information](#)

Get answers to common benefit questions your employees ask you.

[Enrollment Information](#)

This section will explain the various aspects of administering your benefit plan's enrollment.

[Government Legislation](#)

These federal and state regulations directly affect your benefit plan and/or how you administer it.

News

News is view only feature available on employer portal for displaying important news articles for plan admins.

1. Select News tab from the Homepage and the system displays the News page. The news articles title Hyperlink is displayed in the grid format. Filter options is available to select and read the articles.
2. Click on News article title hyper link. System displays selected news article web page. The attachments if any for the article available will be shown.

The News grid has the below fields:

- News article Title – Name of the News Headline
- Publish Date – Date with time stamp
- Author – The name of Author who published the article
- Category – To which category the article belongs to like General, Enrollment, Healthcare Etc.

Image: 31 – News

News Article Title	Publish Date	Author	Category
Test News	8/1/2023 9:41:00 AM	Employer	general

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