UnitedHealthcare®
Specialty Benefits℠

eAdministration
A Quick Reference Guide

UnitedHealthcare Specialty Benefits has simplified the administrative processing for your Life and/or Disability insurance coverage with an online *eAdministration* system. This electronic tool eases the administrative burden by eliminating the need for paper files, reducing turn around time, providing easy access to information, forms, and historical records, plus reducing the time and cost of mailing.

This quick reference guide provides summary information for using the *eAdministration* system for your monthly billing, enrollment (eligibility) changes, retrieving invoice and payment history, and accessing forms – all online. In a series of easy steps, this will guide you through the following processes to:

For comprehensive system instructions, please refer to the eAdministration User Guide.
For comprehensive administrative policies, including Evidence of Insurability, please refer to the Administration Manual.

1.0 ACCESS THE *eADMINISTRATION* SYSTEM

You may access the *eAdministration* system via the internet at any time. However, the e-Bill Services system is only available Monday through Friday, during the hours of 6 a.m. to 9 p.m. central time.

Your subgroup will be set up on the *eAdministration* system during the new case implementation. All new and existing users will receive a secure user ID and password to log onto the system.

To access the *eAdministration* system:

Visit www.uhcfinancialprotection.com

Your subgroup will be set up on the *eAdministration* system during the new case implementation. All new and existing users will receive a secure user ID and password to log onto the system.

Note: Passwords are case sensitive and must be 8-16 characters and contain at least 1 number and 1 letter. Passwords may be changed at your discretion– see *eAdministration* User Guide for instructions.
**Call the Help Desk for assistance: 1-866-322-1210**

2.0 DEFINE THE e-BILL SERVICES SYSTEM FUNCTIONS AND MENU OPTIONS

For ease of navigating within the e-Bill Services system, please familiarize yourself with several of the key menu options and definitions used within the system:

SYSTEM TERMINOLOGY	
Subscriber:	Refers to an eligible employee for enrollment or currently enrolled member
Invoice:	Refers to the monthly billing invoice
Group:	Refers to the name and identification number of an employer group
Subgroup:	Refers to the different locations of an employer group, if necessary, for accounting and reporting purposes
Eligibility:	Refers to the product options for the group and/or the individual or dependent
Dependent:	Refers to eligible dependents of an employee

The e-Bill Services home page for list bill processing is titled the Welcome to List Bill screen. You will access all of the functions needed for the billing administration of your group through this primary screen. The menu options at the top navigation allow you to open the various screens to perform administrative functions.
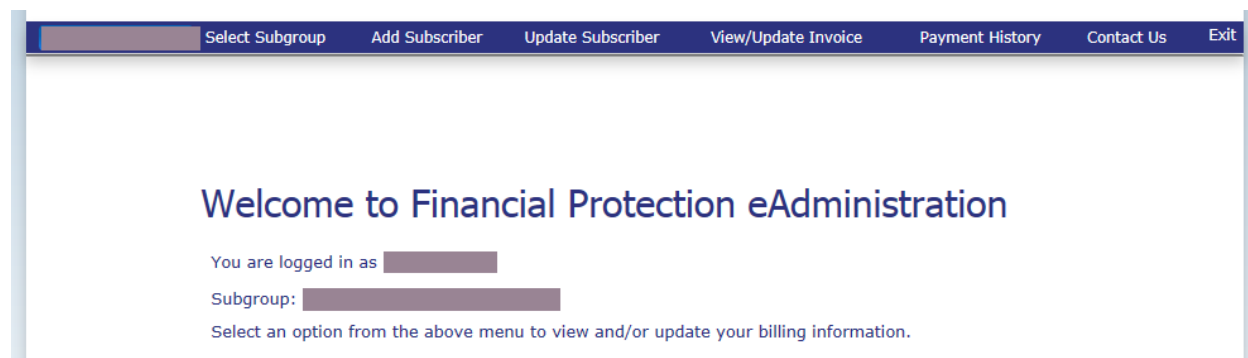
The menu options and transaction screens are defined below:

- ☐ **ADD SUBSCRIBER**: Screen for adding a new employee to enrollment
- ▪ **UPDATE SUBSCRIBER:** Screen to make changes or updates to an enrolled employee including an address change, salary change, qualifying life status change, update dependent information, or cancel voluntary products for the enrollee
- ▪ **VIEW/UPDATE INVOICE**: Allows you to view current or previous months' invoices and to recalculate the current invoice
- ☐ **PAYMENT HISTORY:** Allows you to view past payment history
- ▪ **CONTACT US:** Provides immediate contact information for phone, email, or mailing
- ☐ **SEARCH FUNCTIONS**
  - ▪ To search for a subscriber, click on the Update Subscriber menu option

NAVIGATION LINKS:
At the top right-hand side of the Update screens, you may click on a *link* to directly open the desired screen to make changes for:
***Subscribers*:** To update employee records
***Eligibility*:** To add/change products to an individual's enrollment
***Dependent*:** To update the dependent records(only available if dependent product has been selected)
***Summary*:** To view the employee's entire record
FUNCTIONAL BUTTONS:
At the bottom of most screens you may click on these buttons to:
CANCEL: Exit the page without saving any changes
NEXT: Go to the next continuous screen to complete transaction
PREVIOUS: Go back to the last screen to review or change an entry
SUBMIT: At the summary screen of each transaction, click on the Submit button to save the changes made.

3.0 UPDATE (ADD, CHANGE, TERMINATE) ENROLLMENT RECORDS

The e-Bill Services system refers to any changes to enrollment or existing employee records as "*updating subscribers.*"

To search for an existing subscriber record, to view a subscriber record, to update a record with changes (address and salary), to update due to a qualifying life status change, to update dependent information, or to terminate all the employee's products, select the **UPDATE SUBSCRIBER** menu option.

The system will validate the information on each screen, displaying any errors or incomplete field in **red** text. You must correct/complete all fields indicated before advancing to the next screen.

Changes and additions may be entered at anytime during the billing cycle. The system will save the information submitted and apply to the correct billing cycle based on the effective date.

To search for a specific individuals record:

At the WELCOME TO LIST BILL screen,

- Click on **UPDATE SUBSCRIBER** menu option
- The SEARCH FOR SUBSCRIBER screen opens

  This will allow you to search for a specific employee record. Once you locate the subscriber, you may view the record, update the record, or terminate all of the subscriber's products.

To view the record:

At the SEARCH FOR SUBSCRIBER screen,

- Click on View Summary icon 🔍 to the right of the subscriber's name to view the entire record

To update the record:

At the SEARCH FOR SUBSCRIBER screen,

- Click on Update Subscriber icon 🖱 to open the first screen of 4 or 5 screens
- Make changes to each appropriate screen and click Next to navigate through the update subscriber screens

To terminate all products for a subscriber:

At the SEARCH FOR SUBSCRIBER screen,

- Select the Terminate Products icon ❌

  This screen allows you to enter a termination date for the products associated with this subscriber.

> **Note:** During the process of updating an existing subscriber you may receive a message regarding Evidence of Insurability (EOI). Please refer to the Administration Manual for assistance with this process. Or contact us at 1-866-322-1210.

To update an existing enrollment record:

At the SEARCH FOR SUBSCRIBER screen,

- Click on Update Subscriber icon
- Click on the Enrollment/Change Type down arrow to select one of the following change options from the drop-down menu:
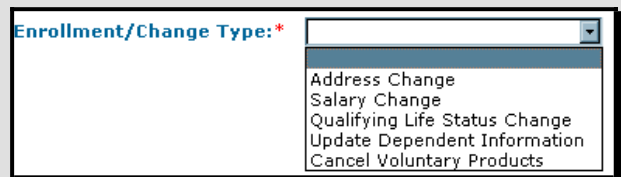
- **Address change:** to change address or phone information for the subscriber
- **Salary Change**: to change the annual salary and/or the salary effective date for the subscriber
- **Qualifying Life Status Change**: to add new dependents due to marriage, divorce or birth/adoption of a child

  This option will allow you to add the new dependent products in the UPDATE ELIGIBILITY screen.
- **Update Dependent Information:** to add new or change existing dependent information
- **Cancel Voluntary Products:** to terminate individual products previously selected.

  This option will be used when not all the previously selected products need to be terminated. When all the products need to be terminated see instructions for terminating all products.

> **Note:** Changes to a subscriber record may not display correctly on the screen until the next business day.

4.0 ADD NEW EMPLOYEES TO ENROLLMENT

To add a new hire to your enrollment for insurance coverage, select the **ADD SUBSCRIBER** menu option. Follow the screens as prompted to complete all of the information required including late entrant information, annual salary information, product eligibility information, and dependent information.

Once you have submitted a new enrollment record, there is approximately a 5 minute delay before you can view the record online. The new subscriber will not display on an invoice until the following business day. Changes and additions may be entered at anytime during the billing cycle. The system will save the information submitted and apply to the correct billing cycle based on the effective date.

To enroll a new employee:

At the Welcome to List Bill screen:

- Select **ADD SUBSCRIBER** menu option
- Click on the down arrow in the Enrollment/Change Type field
- Select New Hire to add your new enrollment

Enrollment/Change Type:*	
	Initial Enrollment
	New Hire

- Required fields are indicated with a red asterisk and must be completed before moving to the next screen
- Click the down arrow in the Class field to open the class code drop-down list
- Select a class code by clicking on it (the CLASS NAME field will be populated for you based on your selection)
- Once the employee information is entered, click on the Next button (bottom right-hand corner) to open the ADDRESS & PHONE INFORMATION and SALARY INFORMATION screen
- Be sure to enter the correct annual salary amount for the employee
- Click on the Next button to open the ADD ELIGIBILITY screen
- The system will validate information on each screen and display errors in **red** that may need to be corrected or fields completed before advancing to the next screen

At the Add Eligibility screen:

- Select the appropriate products to add the product and cover
- age to the employee record
- Product options will display as either one or more flat amount(s) or salary-banded
- Select the correct **product** option based on the employee's request

See **5.0 Eligibility Screen Example** for a sample of the possible options and the following:

1️⃣ Displays the Product description with a selection checkbox

2️⃣ Displays the employee's annual salary or amount per Increment (or unit)

Note: To select a salary-based product the employee's annual salary must be entered in the previous screen.
Click on the Previous button at any time to return to the first ADD SUBSCRIBER screen, and then click Next to add the annual salary amount.

3️⃣ If the product is increment-based, a text box is displayed. Enter the number of increments or units the employee has requested into this field.

4️⃣ Displays the volume for each product. This field will display zero for increment-based products until the Increments field is populated.

Note: When a number is entered into the Increments field for an increment-based product the system will calculate the volume and display it here.

5️⃣ The product Effective Date is pre-populated based on any appropriate waiting periods

6️⃣ Select the product by clicking on the checkbox to the left of the product description

- Once all the appropriate options are selected, click on the Next button (bottom right- hand corner)
- If dependent products were selected, the Add Dependent screen opens

4.0 ADD NEW EMPLOYEES TO ENROLLMENT (Cont)

At the Add Dependent screen:

- Click on the Add New Dependent button to open the appropriate fields
- Complete the information indicated
- Click on the Add Dependent button to save the dependent information to the screen

To Complete and Submit the enrollment:

At the bottom of the Add Eligibility screen (or Add Dependent screen if dependent products are selected),

- Select the Next button (bottom right-hand corner) to open the Summary screen
- Verify all of the information for the subscriber and dependent.

To make corrections, select the appropriate *link* at the top right-hand side of the screen to open the correct screen:

> **Subscriber:** to change address, phone, salary
>
> **Eligibility:** to make changes to product selection
>
> **Dependent:** to make changes to dependent information

- Click the Next button to return to the summary screen

Once you have verified the information entered is correct,

- Click on the Submit Request button at the bottom of the page to save the new record.

Note: It will take approximately 5 minutes after you submit a new enrollment to view the record online. The new subscriber will not appear on the current invoice until the next business day.

During the process of adding a new subscriber you may receive a message regarding Evidence of Insurability (EOI). Please refer to the Administration Manual for assistance with this process. Or contact us at 1-866-322-1210.

5.0 ADD ELIGIBILITY SCREEN EXAMPLE

6.0 REVIEW AND RECALCULATE MONTHLY INVOICE

Each month, an email from UnitedHealthcare Specialty Benefits will notify you when the latest monthly invoice is ready for your review and payment. The notification is sent approximately on the 15th of each month. At this time you will be able to access the new invoice via the e-Bill system.

Select the **VIEW/UPDATE INVOICE** menu option to select your most current invoice to review or recalculate it. Use this menu option to view the last 12 months of invoice history. You may also download Microsoft Excel® reports of your invoice history to save and print as needed.

Review the invoice

At the WELCOME TO LIST BILL screen,

☐ Click the **VIEW/UPDATE INVOICE** menu option

▪ The VIEW INVOICES screen will open and display your most current invoice, plus 12 months of historical invoices

At the VIEW INVOICES screen,

▪ Click on the Update button for the Current Invoice

▪ Or click on the Historical Invoice ID under the Historical Invoices section

☐ The INVOICE OPTIONS screen will open

▪ Click on the Download to Excel button for the Subgroup Member Detail option

▪ The details of the invoice will open into a MS Excel spreadsheet

> **Note:** To save and/or print the invoice details use the standard MS Excel functions; File, Save As or File, Print

To recalculate the most current invoice:

▪ Review the invoice for accuracy

▪ Add any new subscribers and/or update existing subscriber information

▪ Click on the View/Update Invoice option to open the VIEW INVOICES screen

▪ Click on the Update option for the most current invoice to open the INVOICE OPTIONS screen

▪ Click on the Recalculate the Invoice button at the bottom of the screen

> **Note:** You can only recalculate an invoice up to three times between each monthly billing batch which normally falls on the 15th of the month.
>
> Recalculating an invoice less than 3 business days prior to the monthly billing batch is not allowed.
>
> Any changes made less than 3 business days prior to the monthly billing batch will be calculated as an adjustment in the next billing period.

7.0 Payment Option; Submit Electronic ACH, Setup Scheduled Direct Debit ACH or Mail Payment with Invoice

You may submit your monthly premium electronically through the online system, or you may print the invoice remittance form and mail in your payment. To submit your monthly premium, select the **VIEW/UPDATE INVOICE** menu option and follow the instructions below to the <u>Payment Option</u> screen.

To use the electronic payment feature, you must be approved for ACH transactions. To obtain approval, please complete the Electronic Payment Authorization form and submit it to the billing department. (See **Section 9.0 ACCESS ADMINISTRATIVE FORMS AND ADMINISTRATION MANUAL** for instructions to obtain the form)

To make a payment by check:

At the home WELCOME TO LIST BILL screen,

- Select **VIEW/UPDATE INVOICE** menu option

At the VIEW INVOICES screen,

- Click on the <u>Pay Invoice</u> button at the bottom of the screen,

At the PAYMENT OPTIONS screen,

- Select the <u>Print Remittance Form</u> button to pay by check

- Print the remittance form, and mail with your check

To make a payment online:

At the home WELCOME TO LIST BILL screen,

- ☐ Select **VIEW/UPDATE INVOICE** menu option

At the VIEW INVOICES screen,

- Click on the <u>Pay Invoice</u> button at the bottom of the screen

At the PAYMENT OPTIONS screen,

- Select the <u>Make Online Payment</u> button

At the MAKE ONLINE PAYMENT screen

- This secured screen allows you make an online payment

- Follow instructions on the screen to determine the correct electronic funds transfer date

- Enter the Payment Amount

- Verify Bank Information is correct

- Click on the <u>Submit Payment</u> button

8.0 VIEW PAYMENT HISTORY

You may view 12 months of payment history online. In addition you may download to save or print the Payment History to MS Excel. Select the Payment History menu option from the WELCOME TO LIST BILL screen.

To view the payment history details:

At the WELCOME TO LIST BILL screen,

- Select the **PAYMENT HISTORY** menu option

- The PAYMENT HISTORY screen will open

- Click on the Received Date of the invoice you want to view

- The RECEIPT DETAILS screen will open

To return to the PAYMENT HISTORY screen,

- Click on the Return to Payment History button

> **Note:** To print the report you will need to use the print option from your web browser.

To save or print the payment history list:

At the WELCOME TO LIST BILL screen,

- ☐ Select the **PAYMENT HISTORY** menu option

- ☐ The PAYMENT HISTORY screen will open

- Click on the Download to Excel button

- The details of the PAYMENT HISTORY screen will open into a MS Excel spreadsheet

- To save and/or print the payment history details, use the standard MS Excel function; File, Save As or File, Print

9.0 ACCESS ADMINISTRATIVE FORMS AND ADMINISTRATION MANUAL

You can access the administrative forms online to review and print from the Adobe Acrobat Reader®. Access the Forms Library link immediately after the initial log in screen.

You may access the comprehensive Administration Manual through the website at any time. You may download the entire manual and/or a specific section and save for easy retrieval on your personal desktop.

To access and print administrative forms:

Visit www.uhcfinancialprotection.com

- At the LOG IN page, enter your secure User ID and Password and click on the **Log In** button
- At the next display, you will see the *eAdministration* Welcome page.
- At the *eAdministration* Welcome screen, select the Forms Library link

- Select the Search button on the FORMS LIBRARY screen to display the entire listing of available forms.
- Select the appropriate form from the listing of forms.
- To restrict the listing of forms, Search by one of the following categories:
    - o Administration Manual
    - o Beneficiary forms
    - o Claim forms
    - o Conversion and Portability forms
    - o Enrollment forms
    - o Evidence of Insurability (EOI) forms
    - o Miscellaneous

Note: The Electronic Payment Authorization form is located in the Miscellaneous category.

To access the Administration Manual at anytime from the internet: *You do not need to log on to the secure site to access the Administration Manual*

Visit www.uhcfinancialprotection.com

- At the home page, under the Clients, Benefit Manager & TPAs section, click Click here to view Administrative Resources

10.0 CONTACT US

You may contact us by telephone, email, or mail. For complete contact information, select the **CONTACT US** menu option. For easy access, the information is repeated below.

Contact the Help Desk for technical or billing questions:
1-866-322-1210