

eAdministration
User Guide
List Billing

New York

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CHAPTER 1: E-BILL SERVICES SYSTEM

PURPOSE

This chapter provides detailed information on opening and closing the on-line billing system.

We have simplified the process of reviewing, updating, submitting and paying invoices with the e-Bill Services system. This on-line billing system provides an easy, electronic, and secure way to update billing information, access a 12-month history of invoices and payments, and make electronic payments for premium due.

Important Note: By using this web site you agree to our Internet Service Agreement. The eAdministration system is a private web site containing confidential information. Authorized users must utilize this information for business purposes only. Any unauthorized use of the website and/or the data contained on the site may be grounds for penalties, fines or criminal conviction.

BEFORE YOU BEGIN

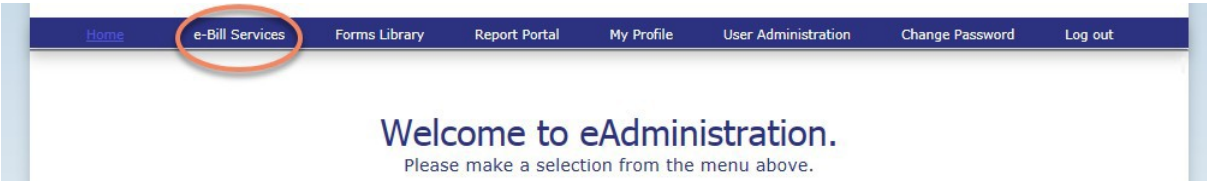
Log on to the *eAdministration*HOME screen.

E-BILL SERVICES SYSTEM

Open e-Bill Services

To open the e-Bill Services system please follows these steps:

1. Log into the *eAdministration* system.
2. The HOME menu displays a list of menu options and applications.
3. Click on the e-Bill Services link.



- The SEARCH FOR SUBGROUPS screen opens and displays a table listing the Subgroup ID and Name for each subgroup you assigned to your user id.



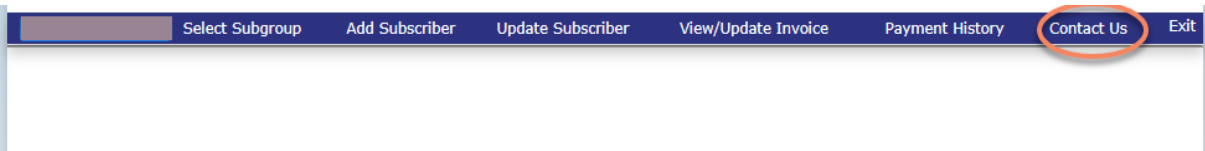
Subgroup ID	Name	Select Subgroup
1001		Select

- Click on the appropriate SUBGROUP ID or NAME link to open the e-Bill Services WELCOME screen. See below for an example of the Welcome screen.

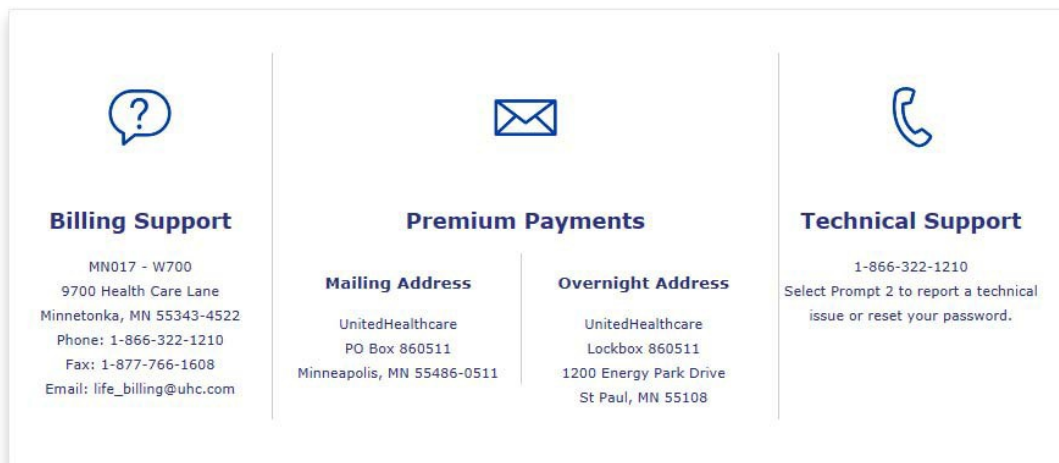
Contact Us

To view contact information, please follow these steps:

- Click on the Contact Us menu option at the top of the WELCOME screen.



- The Contact Us screen opens and displays the following information:
 - Help Desk
 - Premium Mailing Address
 - Billing Department



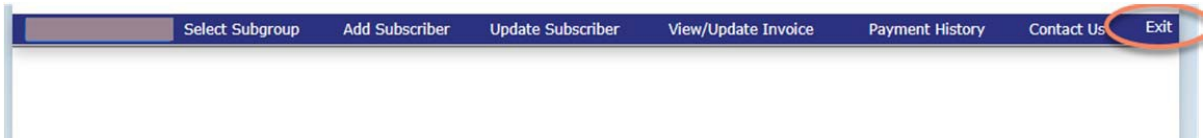
The Contact Us screen displays three columns of contact information:

- Billing Support** (Help Desk icon): MN017 - W700, 9700 Health Care Lane, Minnetonka, MN 55343-4522, Phone: 1-866-322-1210, Fax: 1-877-766-1608, Email: life_billing@uhc.com
- Premium Payments** (Envelope icon):
 - Mailing Address**: UnitedHealthcare, PO Box 860511, Minneapolis, MN 55486-0511
 - Overnight Address**: UnitedHealthcare, Lockbox 860511, 1200 Energy Park Drive, St Paul, MN 55108
- Technical Support** (Phone icon): 1-866-322-1210, Select Prompt 2 to report a technical issue or reset your password.

Exit

To close out of the E-BILL SERVICES system, please follow these steps:

1. Click on the Exit menu option on the top of the WELCOME screen.
2. The *eAdministration* Home page will display.
3. To exit out of the *eAdministration* system, click on the LOG OUT link on the menu list.



CHAPTER 2: LIST BILL E-BILL PROCESSING

PURPOSE

This chapter provides detailed information about online processing for List Billed groups.

We will set up your access level according to the current number of invoices sent out for your group. You may be set up on the group level, which gives you access to all subgroups within your group, or at the subgroup level, which gives you access to one or more subgroups within your group.

Example of Group & Subgroup hierarchy:

Group = ABC Company

Subgroup 1001 = ABC Company Miami, Florida

Subgroup 1002 = ABC Company New York, New York

Subgroup 1003 = ABC Company Los Angeles,
California

BEFORE YOU BEGIN

Login to the e-Bill Services system by following the steps in Chapter 1: E-Bill Services System, Section 1: Access e- Bill Services.

Section 1: Adding a New Subscriber

PURPOSE

This section provides detailed information regarding adding a new subscriber to a subgroup. The following screens must be completed through the e-Bill Services system in order to submit the new subscriber information to be included on an invoice:

- Add Subscriber
- Address and Phone Information
- Add Eligibility
- The Add Dependent screen must be completed only if a dependent product is selected in the Add Eligibility screen
- You must submit the new subscriber information on the Summary screen

BEFORE YOU BEGIN

Login to the e-Bill Services system by following the steps in Chapter 1: E-Bill Services System, Section 1: Access e- Bill Services.

Add Subscriber

Subscriber information must be added and updated at the subgroup level. It is your responsibility to add and/or update subscribers for all the subgroups that you administer.

To begin the Add Subscriber process, please follow these steps:

1. From the Welcome to List Bill screen, click on the ADD SUBSCRIBER menu option at the top of the screen.

Select Subgroup **Add Subscriber** Update Subscriber View/Update Invoice Payment History Contact Us Exit

Welcome to Financial Protection eAdministration

You are logged in as [redacted]
Subgroup: [redacted]
Select an option from the above menu to view and/or update your billing information.

2. The Add Subscriber screen opens. The Group and Subgroup ID and Name will be displayed on this screen

Add Subscriber

Subscriber > Eligibility > Dependent > Summary

Subscriber Information

Enrollment/Change Type*	: <input type="text" value="Select"/>	First Name*	: <input type="text"/>
Is subscriber a late entrant?*	: <input type="text" value="Select"/>	Middle Name	: <input type="text"/>
Group ID	: [redacted]	Last Name*	: <input type="text"/>
Group Name	: [redacted]	SSN OR Employee ID*	: <input type="text"/>
Subgroup ID	: 1001	DOB* (mm/dd/yyyy)	: <input type="text"/>
Subgroup Name	: [redacted]	Gender*	: <input type="text" value="Select"/>
Class*	: <input type="text"/>	Marital Status	: <input type="text" value="Select"/>
Class Name	:	Hire Date* (mm/dd/yyyy)	: <input type="text"/>

Address and Phone Information

Address Line 1* : City* :

Important: All fields in the following screens with a **red** asterisk indicate required fields and must be completed before you can continue with the enrollment process. You will be able to use the tab key to move to the next available field.

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- Click on the down arrow in the Enrollment/Change Type field to open the drop-down menu list.

- Select one of the following options:
 Initial Enrollment – to indicate that this subscriber is an employee at the time the group policy was initiated.
 New Hire – to indicate that this subscriber was hired after the group policy was initiated.
- Click on the down arrow in the “IS SUBSCRIBER A LATE ENTRANT?” field.


- Select one of the following options:
 Yes – to indicate that the subscriber is a late entrant and that the completed enrollment form was not received within the enrollment period.
 No – to indicate that the subscriber is not a late entrant and that the completed enrollment form was received within the enrollment period.

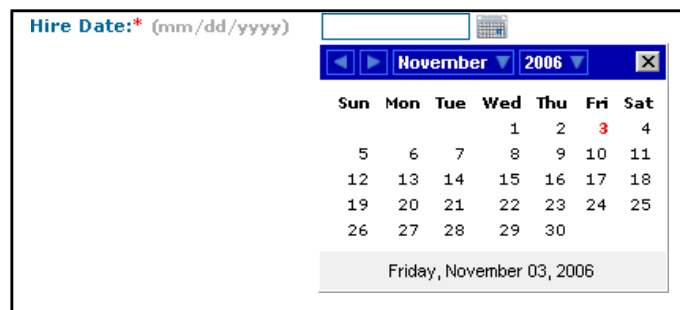
- Click on the down arrow in the CLASS field and select the appropriate option for this subscriber by clicking on it. The options in the class field will be populated based on the group assigned to you and the subgroup selected previously. The CLASS NAME will display when an option is selected
- Click on the FIRST NAME field and type in the subscriber's first name.

Continued next page

9. Use the <Tab > key or click on the MI field and type in the subscriber's middle initial, if necessary. This is an optional step as this field is not required.
10. Use the <Tab > key or click on the LAST NAME field and type in the subscriber's last name.
11. Use the <Tab > key or click on the SSN OR EMPLOYEE ID field to type in the subscriber's Social Security Number, if known, or employee ID number.
12. Use the <Tab > key or click on the DOB field and type in the subscriber's date of birth using the following format: mm/dd/yyyy.
13. Use the <Tab > key or click on the GENDER field. Type M for Male or F for Female.
14. Use the <Tab > key or click on the MARITAL STATUS field. Type in one of the following:
 - D for Divorced
 - M for Married
 - S for Single
 - W for Widow(er)
15. Or, click on the down arrow to open the drop-down menu and select one of the options. This is an optional step as this field is not required.







16. Use the <Tab > key or click on the HIRE DATE field. Type in the subscriber's actual hire date using the following format: mm/dd/yyyy.
17. Or, select the calendar icon  to open the pop-up calendar.



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To use the pop-up calendar:

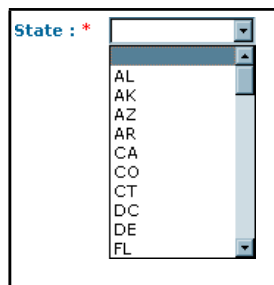
- Click on the left arrow  to view a previous month
- Click on the right  arrow to view a future month
- Click on the down arrow  next to the month to view a list of months and click on an option.
- Click on the down arrow  next to the year to view a list of years and click on an option.
- When the correct month and year is selected, click on the date to select the correct month, day and year.

18. The ADDRESS AND PHONE AND SALARY INFORMATION follows.

Address and Phone Information

To continue with the enrollment process, please follow these steps:

1. Click on the ADDRESS LINE 1 field and type in the subscriber's address.
2. Use the <Tab > key or click on the ADDRESS LINE 2 field and type in the subscriber's additional address information, if necessary. This field is optional and is not required.
3. Use the <Tab > key or click on the CITY field and type in the subscriber's city name.
4. Use the <Tab > key or click on the STATE field and type in the first letter of the two-character state abbreviation. Continue to select this letter key or the down arrow key until the correct two-character state abbreviation appears.
For example: to select the MN state code, select the "M" key five times until "MN" appears in the field.
5. Or, select the down arrow in the STATE field to open the drop-down menu list. Scroll down the list to select the correct two-character state abbreviation.



Continued next page

6. Use the <Tab > key or click on the ZIP CODE field and type in a valid zip code using the following format: either 99999 or 99999-0000.
7. Use the <Tab > key or click on the HOME PHONE field and type in a valid phone number using the following format: 999-999-9999. This field is optional as it is not a required field.
8. Use the <Tab > key or click on the WORK PHONE field and type in a valid phone number using the following format: 999-999-99999. This field is optional as it is not a required field.
9. Use the <Tab > key or click on the EXTENSION field and type in a valid work phone extension number using the following format: 9999. This field is optional as it is not a required field.
10. Use the <Tab > key or click on the ANNUAL SALARY field and type in a valid salary amount using the following format: 99999.99.

Note: This field is required if the subscriber has selected a salary-based product. Salary-based products are displayed on the ADD ELIGIBILITY screen.

11. Click on the SALARY EFFECTIVE DATE field and type in the appropriate date.
12. Or, click on the calendar icon and use the pop-up calendar to select the appropriate date.

Note: This field is required if an ANNUAL SALARY amount is entered.

13. Click <Previous > to return to the SUBSCRIBER INFORMATION screen.
 14. Click <Cancel > at the bottom of the screen if you do not want to continue with the enrollment process. This action will clear out all previously entered information and return you to the WELCOME TO LIST BILL screen.
 15. Click <Next > when all the required fields are completed.
 16. The system will validate information entered in this screen. If validation fails, a list of incomplete or invalid fields will display in red text at the top of the screen.
 17. Make any corrections necessary, and then click <Next > again to validate the information.
 18. When validation passes, the ADD ELIGIBILITY screen opens.
-

Add Eligibility

Subscriber Name: AGAIN, JOE

Subscriber > Eligibility > Dependent > Summary

Your selections are based on the class selected on the Subscriber Information page. Select products that you are enrolling in.

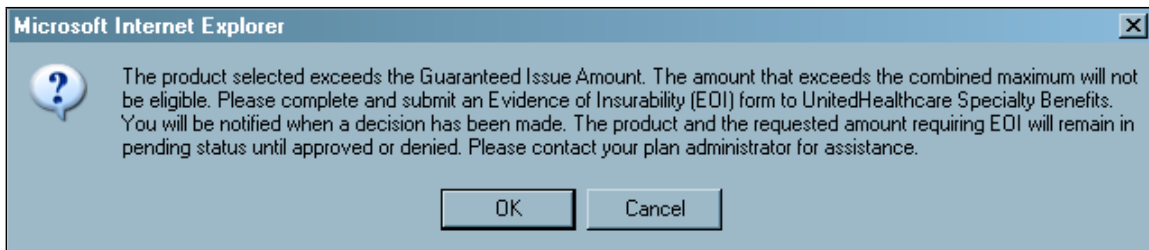
Product Selection					
Products	Salary/Increments	Increments	Covered Person	Volume	Effective Date
<input type="checkbox"/> Basic Life	1.00	<input type="text" value="0"/>	Subscriber	0.00	11/2/2018
<input type="checkbox"/> Basic AD&D	1.00	<input type="text" value="0"/>	Subscriber	0.00	11/2/2018
<input type="checkbox"/> Supp Life	1.00	<input type="text" value="0"/>	Subscriber	0.00	11/2/2018
<input type="checkbox"/> Supp AD&D	1.00	<input type="text" value="0"/>	Subscriber	0.00	11/2/2018
<input type="checkbox"/> Supp Dep Life Spouse	1.00	<input type="text" value="0"/>	Spouse	0.00	11/2/2018
<input type="checkbox"/> Supp Dep AD&D Spouse	1.00	<input type="text" value="0"/>	Spouse	0.00	11/2/2018
<input type="checkbox"/> Supp Dep Child Life \$10,000			Dependents	10,000.00	11/2/2018
<input type="checkbox"/> Supp Dep Child Life \$2,000			Dependents	2,000.00	11/2/2018
<input type="checkbox"/> Supp Dep Child Life \$4,000			Dependents	4,000.00	11/2/2018

To select products for the new subscriber, please follow these steps:

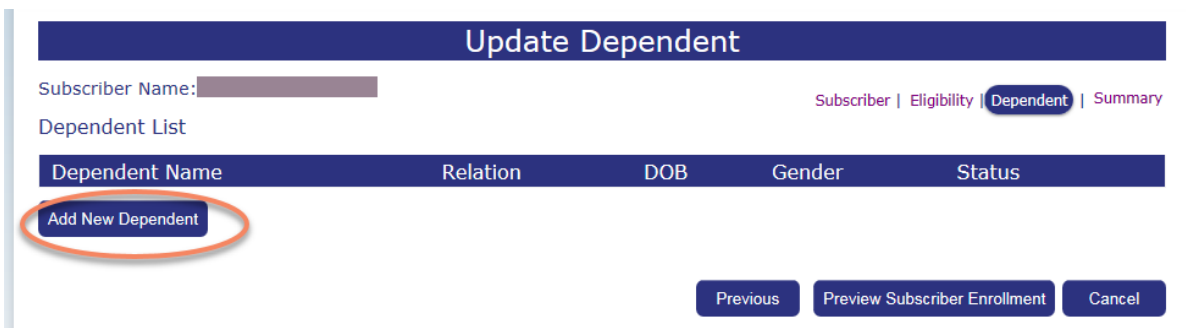
1. Click on the box to the left of the product description to select the product. A checkmark will appear in the box to indicate the products have been selected.
2. The product EFFECTIVE DATE is pre-populated based on the ENROLLMENT/CHANGE TYPE selected and the HIRE DATE entered in the ADD SUBSCRIBER screen.
3. If a salary-based product has been selected and the ANNUAL SALARY amount has not been entered in the previous screen, the following message will appear:
You have selected salary-based products. Please go to the previous page and enter the salary amount.
4. Click <Previous > to return to the ADD SUBSCRIBER screen then click on the Next button to return to the ADDRESS & PHONE AND SALARY INFORMATION screen.
5. Click <ANNUAL SALARY> field and type in the subscriber's appropriate annual salary amount.
6. Use the <Tab > key or click on the SALARY EFFECTIVE DATE field and type in the appropriate date using the following format: mm/dd/yyyy.
7. Or, click on the pop-up calendar icon to use the calendar function.

Continued next page

8. Click <Cancel > at the bottom of the screen if you do not want to continue with the enrollment process. This action will clear out all previously entered information and return you to the WELCOME TO LISTBILL screen.
9. Click <Next > when all the required fields are completed.
10. The system will validate information entered in this screen. If validation fails, a list of incomplete or invalid fields will display in **red** text at the top of the screen.
11. Make any corrections necessary and click <Next > again to validate the information.
12. If an Evidence of Insurability (EOI) form is required, you may see an informational message similar to the following:



13. If you need assistance completing and submitting the EOI form, please contact your plan administrator.
14. When validation passes, and a dependent product has been selected the ADD DEPENDENT screen opens.



Dependent Information					
First Name *	:	<input type="text"/>	Status :	<input type="text" value="v"/>	
MI	:	<input type="text"/>	SSN	:	<input type="text"/>
Last Name *	:	<input type="text"/>	Relationship *	:	<input type="text" value="v"/>
DOB (mm/dd/yyyy) *	:	<input type="text"/>	Effective Date	:	<input type="text"/>
Gender *	:	<input type="text" value="v"/>			

Student Information (Information required only if the dependent has exceeded age limit and is a student)					
Student?	:	<input type="text" value="v"/>	Student Type	:	<input checked="" type="radio"/> Full-Time
		(If Yes, complete the following information)			<input type="radio"/> Part-Time
School Name	:	<input type="text"/>	Verified By	:	<input type="text"/>
Effective Date	:	<input type="text"/>	Verification Date	:	<input type="text"/>

Disability Information (Information required only if the dependent has exceeded the age limit and is disabled)					
Disability Type	:	<input type="text" value="v"/>	Verified By	:	<input type="text"/>
Effective Date	:	<input type="text"/>	Verification Date	:	<input type="text"/>

To add a dependent for the new subscriber, please follow these steps:

1. Click <Add New Dependent> to expand the screen and display the dependent fields.
2. Click on the FIRST NAME field and type in the dependent's first name.
3. Use the <Tab > key or click on the MI field and type in the dependent's middle initial, if necessary. This is an optional step as this field is not required.
4. Use the <Tab > key or click on the LAST NAME field and type in the dependent's last name.
5. Use the <Tab > key or click on the DOB field and type in the dependent's date of birth in the following format: mm/dd/yyyy.
6. Use the <Tab > key or click on the GENDER field and type M for Male or F for Female.
7. Or, click on the down arrow to open the drop-down menu and select an option.
8. Click on the down arrow on the STATUS field to open the drop-down menu and select an option, if appropriate. This is an optional step as this field is not required.

A screenshot of a web form field labeled "Status:". The field is a dropdown menu with a blue header bar. The menu is open, showing four options: "Active", "Deceased", "Premember", and "Retired".

9. Use the <Tab > key or click on the SSN field and type in the dependent's Social Security Number, if necessary. This is an optional step as this field is not required.
10. Click on the down arrow on the RELATIONSHIP field to open the drop-down menu and select an option.

A screenshot of a web form field labeled "Relationship: *". The field is a dropdown menu with a blue header bar. The menu is open, showing four options: "Daughter", "Son", "Husband", and "Wife".

11. Click on the EFFECTIVE DATE field and type in the appropriate date in the following format: mm/dd/yyyy. This is an optional step as this field is not required.
12. If the dependent child is not a student or disabled child over the age limit, click <Add Dependent> to add the dependent to the Dependent List section.
13. Click <Reset > to clear out the information entered in the previous steps.
14. Click <Cancel > if you do not want to continue with the enrollment process. This action will clear out all previously entered information and return you to the WELCOME TO LIST BILL screen.

Add Dependent – Student

If the dependent child over the age limit and is a student, please follow these steps:

1. After completing Steps 1 through 11 above, click on the down arrow on the STUDENT field and select an option: Yes or No.
2. Use the <Tab > key or click on the SCHOOL NAME field and type in the name of the dependent's school.
3. Use the <Tab > key or click on the EFFECTIVE DATE field and type in the date the student began attending the school in the following format: mm/dd/yyyy.

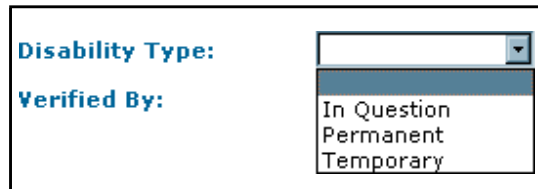
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4. Click on one of the radio buttons to indicate the STUDENT TYPE: Full-Time or Part-Time.
5. Click on the VERIFIED BY field and type in the full name of the person that verified the dependent child is a student.
6. Use the <Tab > key or click on the VERIFICATION DATE field and type in the date the student information was verified in the following format: mm/dd/yyyy.
7. Click <Add Dependent> to save the dependent child student information.
8. Click <Reset> button to clear the dependent child student information.
9. Click <Cancel> button to exit out of the Add Subscriber process.

Add Dependent – Disabled

If the dependent child is over the age limit and disabled, please follow these steps:

1. After completing the steps to add a dependent, click on the down arrow on the DISABILITY TYPE field to open the drop-down menu. Select one the appropriate option.



The screenshot shows a form with two labels: "Disability Type:" and "Verified By:". To the right of "Disability Type:" is a dropdown menu that is open, displaying three options: "In Question", "Permanent", and "Temporary".

2. Use the <Tab > key or click on the EFFECTIVE DATE field and type in the appropriate date for the disability in the following format: mm/dd/yyyy.
3. Use the <Tab > key or click on the VERIFIED BY field and type in the full name of the person that verified the dependent child is disabled.
4. Use the <Tab > key or click on the VERIFICATION DATE field and type in the date the disability information was verified in the following format: mm/dd/yyyy.
5. Click <Add Dependent> to save the disability information for the dependent child.
6. Click <Reset> to clear the dependent child disability information.
7. Click <Cancel > to exit out of the ADD SUBSCRIBER process.

Continued next page

Dependent List

When the Add new dependent button has been selected and dependent information has been entered correctly, the Dependent List section will display on the screen.

When all appropriate dependents are entered, click <Next > to open the SUMMARY screen.

Summary

To complete the enrollment process, please follow these steps:

1. Review the information on the SUMMARY screen to verify the subscriber and dependent (if necessary) is entered correctly.
2. Select the appropriate breadcrumb link at the top right-hand side of the screen to open the screen to make corrections.
3. To make corrections to the SUBSCRIBER INFORMATION, ADDRESS AND PHONE INFORMATION and/or SALARY INFORMATION, click on the Subscriber breadcrumb link.
4. The ADD SUBSCRIBER screen opens.
5. Make corrections to the subscriber information, and then select the Next button to open the ADDRESS AND PHONE INFORMATION and SALARY INFORMATION screen.
6. Make any necessary corrections to the subscriber's address and/or salary information.

Continued next page

Summary

Subscriber Name: SMITH, MATTHEW

[Subscriber](#) | [Eligibility](#) | [Dependent](#) | **[Summary](#)**

Subscriber Information

Subscriber Effective Date : 05/01/2016	First Name : ██████████
Group ID : ██████████	MI : █
Group Name : ████████████████████	Last Name : ██████████
Subgroup ID : 1001	SSN Or Employee ID : ██████████
Subgroup Name : ████████████████████	DOB : ██████████
Class : 0002	Gender : █
Class Name : All Active FT Employees	Marital Status: :
	Hire Date : ██████████

Address and Phone Information

Address Line 1 : 6096 DUNFORD DRIVE	Zip Code : 75033
Address Line 2 :	Home Phone :
City : FRISCO	Work Phone :
State : TX	Extension :

Salary Information

Annual Salary : ██████████	Salary Effective Date : 01/01/2018
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7. To open the ADD ELIGIBILITY screen, click on the Eligibility breadcrumb link or click <Next > from the ADDRESS AND PHONE INFORMATION screen.
8. Make any necessary corrections to the product selections.
9. To open the ADD DEPENDENT screen click on the Dependent breadcrumb link, or click <Next > from the ADD ELIGIBILITY screen.
10. Make any necessary corrections to the dependent information.

Note: The Dependent link will not be available for selection if a dependent product was not selected in the ADD ELIGIBILITY screen.

11. To return to the SUMMARY screen click on the Summary breadcrumb link, or click <Next > from the ADD ELIGIBILITY or ADD DEPENDENT screen.
12. After reviewing the SUMMARY screen and all information is correct, click <Submit> to finalize the ADD SUBSCRIBER process.

Continued next page

13. A confirmation window will open.

14. Select one of the following options by clicking on the radio button:

- Add a new subscriber to open the Add Subscriber screen
- Exit Enrollment to open the Welcome to List Bill screen

Enrollement Confirmation

Request submitted. Do you want to:

- Add a new subscriber
- Select another subscriber
- Exit Enrollment

Note: The e-Bill system will display new subscriber information in approximately 5 minutes after the information has been submitted.

The new subscriber will not display on an invoice until the following business day.

Section 2: Reviewing Existing Subscribers
--

PURPOSE

This section provides detailed information regarding how to review information for existing subscribers for your subgroup.

To view summary information for a specific subscriber, you must first select a subscriber from the Search for Subscribe list.

BEFORE YOU BEGIN

Login to the e-Bill Services system by following the steps in Chapter 1: E-Bill Services System, Section 1: Access e- Bill Services.



Search for Subscriber

To review subscriber summary information, you must first identify an existing subscriber. To identify a specific subscriber, please follow these steps:

1. From the WELCOME TO LIST BILL screen, click on the Update Subscriber menu option at the top of the screen.
2. The Search for Subscriber screen will open.
3. Click on the SUBSCRIBER LAST NAME or SUBSCRIBER ID field and type in full or partial information and click on the Search button.
4. A list of subscribers will display based on the search criteria entered.

View Summary

1. Click on the View Summary icon to open the SUMMARY screen for that subscriber.

A table with a dark blue header and white body. The header has five columns: Subscriber ID, Subscriber Name, View Summary, Update Subscriber, and Terminate Subscriber. The 'View Summary' column contains a magnifying glass icon. The 'Update Subscriber' column contains a document icon. The 'Terminate Subscriber' column contains a trash can icon. There are two rows of data below the header, with the first two columns of each row obscured by a grey bar. The 'View Summary' icon in the first row is circled in orange.

Subscriber ID	Subscriber Name	View Summary	Update Subscriber	Terminate Subscriber
[Redacted]	[Redacted]			
[Redacted]	[Redacted]			

2. You will only be able to view the subscriber information.
 3. This information will display as it did on the SUMMARY screen when you performed the Add Subscriber process.
-

Section 3: Updating Existing Subscribers
--

PURPOSE

This section provides detailed information regarding how to update existing subscriber information for your subgroup.

The following updates can be made to an existing subscriber through the e-Bill Services system.

- Address Changes
- Salary Changes
- Qualifying Life Status Change
- Update Dependent Information
- Cancel Voluntary Products

BEFORE YOU BEGIN

Login to the e-Bill Service WELCOME TO LISTBILL screen.

Update Subscriber

To open the UPDATE SUBSCRIBER screen, please follow these steps:

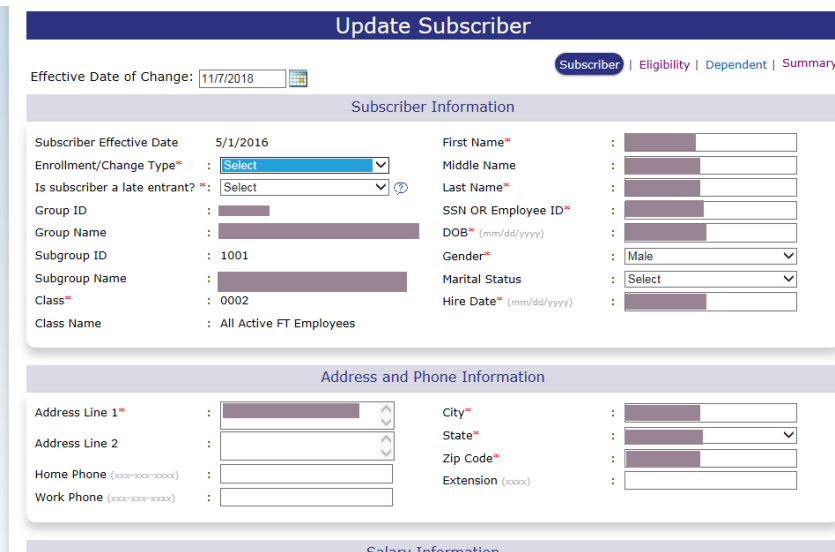
1. Click on the Update Subscriber menu option on the WELCOME TO LIST BILL screen.



2. The SEARCH FOR SUBSCRIBER screen opens.
3. Click on the SUBSCRIBER LAST NAME or SUBSCRIBER ID field and type in the full or partial information and click <Search>.
4. From the list of subscribers, click on the Update Subscriber icon for the appropriate subscriber.



5. The UPDATE SUBSCRIBER screen opens.



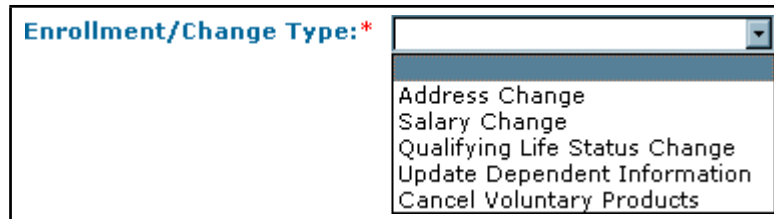
The 'Update Subscriber' screen is divided into several sections:

- Effective Date of Change:** 11/7/2018
- Subscriber Information:**
 - Subscriber Effective Date: 5/1/2016
 - Enrollment/Change Type*: Select
 - Is subscriber a late entrant?*: Select
 - Group ID: [Redacted]
 - Group Name: [Redacted]
 - Subgroup ID: 1001
 - Subgroup Name: [Redacted]
 - Class*: 0002
 - Class Name: All Active FT Employees
 - First Name*: [Redacted]
 - Middle Name: [Redacted]
 - Last Name*: [Redacted]
 - SSN OR Employee ID*: [Redacted]
 - DOB* (mm/dd/yyyy): [Redacted]
 - Gender*: Male
 - Marital Status: Select
 - Hire Date* (mm/dd/yyyy): [Redacted]
- Address and Phone Information:**
 - Address Line 1*: [Redacted]
 - Address Line 2: [Redacted]
 - Home Phone (xxx-xxx-xxxx): [Redacted]
 - Work Phone (xxx-xxx-xxxx): [Redacted]
 - City*: [Redacted]
 - State*: [Redacted]
 - Zip Code*: [Redacted]
 - Extension (xxxx): [Redacted]
- Salary Information:** (Section header visible)

Update Subscriber – Address/Salary Changes

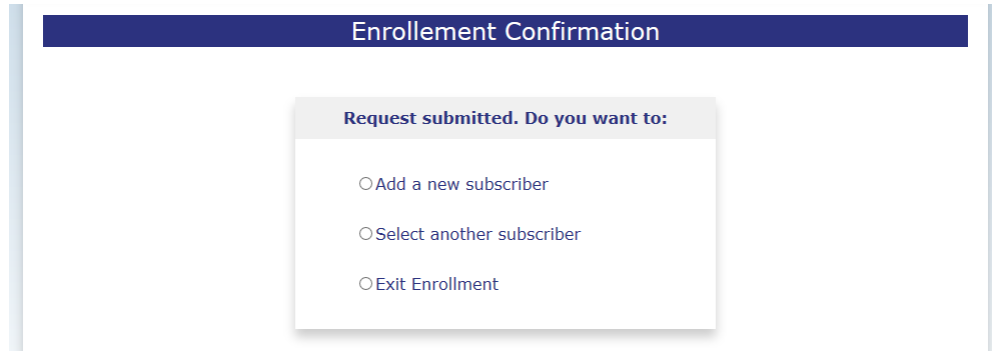
To make Address or Salary changes for a subscriber, please follow these steps:

1. Follow the steps defined previously to open the Update Subscriber screen for a specific subscriber.
2. Click on the down arrow on the ENROLLMENT/CHANGE TYPE field screen to open the drop-down menu.



3. Select one of the Enrollment/Change Type options:
 - Address Change to only change the subscriber's address or phone information. You will not be able to update products using this option.
 - Salary Change to only change the subscriber's Annual Salary and/or Salary Effective Date. You will not be able to update products using this option.
4. Click on the late entrant field and indicate whether or not the information change is for a late entrant.
5. Click <Next > to open the ADDRESS AND PHONE INFORMATION AND SALARY INFORMATION screen.
6. Make any changes necessary, and then click <Next >.
7. The UPDATE ELIGIBILITY screen opens. You will not be able to make any changes in the product selections.
8. Click <Next > on the UPDATE ELIGIBILITY screen.
9. If the subscriber has previously selected a dependent product, the UPDATE DEPENDENT screen opens.
10. If the UPDATE DEPENDENT screen opens, click <Next > to open the SUMMARY screen.
11. If the subscriber has not previously selected a dependent product, the SUMMARY screen will display.
12. Verify the correct information has been entered.
13. Click <Cancel > to close the SUMMARY screen without saving any changes made during the update process.
14. Click <Submit Request> to save the changes made and close the SUMMARY screen.
15. When the changes have been submitted, the confirmation window opens:

Continued next page



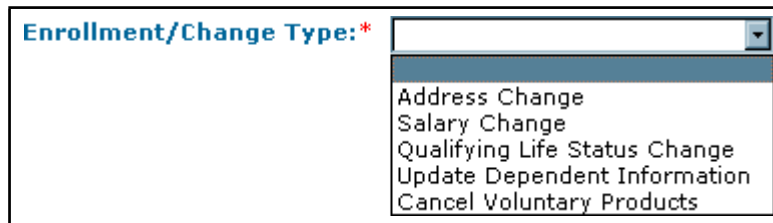
16. Select the appropriate radio button.
 - Add a new subscriber to open the ADD SUBSCRIBER screen.
 - Select another subscriber to open the SEARCH FOR SUBSCRIBER screen.
 - Exit Enrollment to open the WELCOME TO LIST BILLS screen.

Update Subscriber – Qualifying Life Status Change

To make a Qualifying Life Status Change, please follow these steps:

Note: Qualifying Life Status Changes include selecting new dependent products and adding new dependents due to marriage, divorce or birth/adoption of a child.

1. Follow the steps defined previously to open the UPDATE SUBSCRIBER screen for a specific subscriber.
2. Select the Qualifying Life Status Change option from the ENROLLMENT/CHANGE TYPE field.



3. Answer the late entrant question to indicate whether or not the changes are for a late entrant.
4. Make any appropriate name changes, if necessary.
5. Click <Next > to open the ADDRESS AND PHONE INFORMATION AND SALARY INFORMATION screen.
6. Click <Next > to open the UPDATE ELIGIBILITY screen.
7. Select any of the appropriate dependent products, if necessary.

Continued on next page

8. Click <Next > to open the UPDATE DEPENDENT screen if at least one dependent product has been selected.
9. Follow the steps defined in the enrollment process to add a dependent.
10. Click <Next > to open the SUMMARY screen.
11. Verify the information is correct on the SUMMARY screen.
12. Click <Cancel > to close the SUMMARY screen without saving any changes.
13. Click <Submit Request> button to save all the changes made during the update subscriber process.

Update Subscriber – Add Dependent

To add new dependent information, please follow these steps:

1. Follow the steps defined previously to open the UPDATE SUBSCRIBER screen for a specific subscriber.
 2. Select the Update Dependent Information option from the ENROLLMENT/CHANGE TYPE field.
 3. Answer the late entrant question to indicate whether or not the changes are for a late entrant.
 4. Click <Next > to open the ADDRESS AND PHONE INFORMATION AND SALARY INFORMATION screen.
 5. Click <Next > to open the UPDATE ELIGIBILITY screen.
 6. Click <Next > to open the UPDATE DEPENDENT screen.
 7. Follow the steps previously defined in the enrollment process to add a dependent.
 8. Click <Next > to open the SUMMARY screen.
 9. Verify the information is correct on the SUMMARY screen.
 10. Click <Cancel > to close the SUMMARY screen without saving any changes.
 11. Click <Submit Request> button to save all the changes made during the update subscriber process.
-

Update Subscriber – Update Dependent

To update dependent information, please follow these steps:

1. Follow the steps defined previously to open the UPDATE SUBSCRIBER screen for a specific subscriber.
 2. Select the Update Dependent Information option from the ENROLLMENT/CHANGE TYPE field.
 3. Answer the late entrant question to indicate whether or not the changes are for a late entrant.
 4. Click <Next> to open the Address and Phone Information and Salary Information screen.
 5. Click <Next> to open the UPDATE ELIGIBILITY screen.
 6. Click <Next> to open the UPDATE DEPENDENT screen.
 7. Click on the DEPENDENT NAME link to expand the Update Dependent screen and display the existing information for the specified dependent.
 8. Click on the appropriate field and type in the correct information for the existing dependent.
 9. Click <Next> to open the SUMMARY screen.
 10. Verify the information is correct on the SUMMARY screen.
 11. Click <Cancel > to close the SUMMARY screen without saving any changes.
 12. Click <Submit Request> to save all the changes made during the update subscriber process.
-

Update Subscriber – Cancel Voluntary Products

To cancel one or more voluntary products for a subscriber, please follow these steps:

1. Follow the steps previously defined to open the UPDATE SUBSCRIBER screen for a specific subscriber.
 2. Select the Cancel Voluntary Products option from the ENROLLMENT/CHANGE TYPE field.
 3. Answer the late entrant question to indicate whether or not the changes are for a late entrant.
 4. Click <Next> to open the Address and Phone Information and Salary Information screen.
 5. Click <Next> to open the UPDATE ELIGIBILITY screen.
 6. Click on the checkbox in the TERMINATE column for each product to be terminated. A checkmark will appear in the checkbox.
 7. Click on the TERMINATION DATE field and type in the appropriate date using the following format: mm/dd/yyyy. Or, use the pop-up calendar function.
 8. Click <Next> to open the UPDATE DEPENDENT or SUMMARY screen.
 9. If the UPDATE DEPENDENT screen opens, Click <Next> to open the SUMMARY screen.
 10. Verify the information is correct on the SUMMARY screen.
 11. Click <Cancel > to close the SUMMARY screen without saving any changes.
 12. Click <Submit Request> button to save all the changes made during the update subscriber process.
-

Section 4: Terminating a Subscriber

Search for Subscriber

Subscriber Last Name :

Subscriber ID :

Use the wild card % as a input for the Subscriber Last Name to see all subscribers

Subscriber ID	Subscriber Name	View Summary	Update Subscriber	Terminate Subscriber
<input type="text"/>	<input type="text"/>			
<input type="text"/>	<input type="text"/>			

Terminate Subscriber

To terminate a subscriber, all the products previously selected for that subscriber must be cancelled.

To cancel all the subscriber’s products, please follow these steps:

- 1. Select the Update Subscriber menu option at the top of the WELCOME TO LIST BILL screen.
- 2. The SEARCH FOR SUBSCRIBER screen opens.
- 3. Follow the steps to search for a specific subscriber to display the Subscriber Listing.
- 4. Click on the TERMINATE PRODUCTS icon for the appropriate subscriber.
- 5. The TERMINATE SUBSCRIBER screen opens.

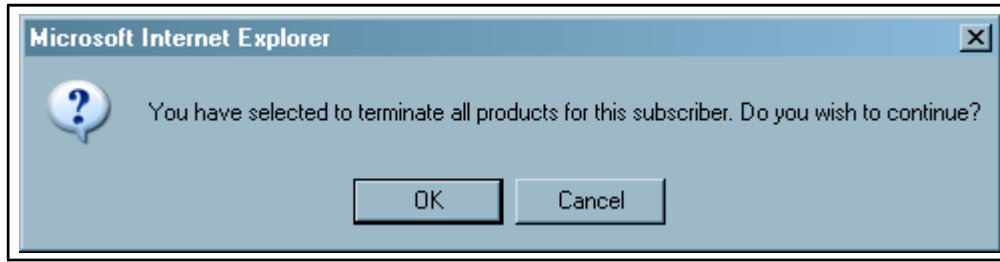
Please Enter Termination Date (mm/dd/yyyy) ^{*} :

6. _____

- 7. Click on the PLEASE ENTER TERMINATION DATE field and type in the appropriate date using the following format: mm/dd/yyyy. Or, use the pop-up calendar function.

Continued next page

8. Click <Cancel > to close the screen without terminating the products.
9. Click <Terminate > to terminate all the products associated with the subscriber.
10. The termination confirmation window opens:



11. Click <Cancel > to close the confirmation window and return to the TERMINATE SUBSCRIBER screen.
 12. Click <OK > to continue with the termination process and return to the SEARCH FOR SUBSCRIBER screen.
-

Section 5: View/Update Invoice

PURPOSE

This section provides detailed information on how to:

- View the current or an historical invoice
- Add or update subscribers for a current invoice
- Submit a request to rebill a current invoice
- Download a current or historical invoice to Microsoft Excel

You will receive an e-mail usually on the first business day after the 15th of each month stating that the latest invoice, including all subgroup information, is ready for your review and update. At that time you will be able to retrieve that invoice using the e-Bill Services system.

If you do not receive an invoice on the first business day after the 15th of the month, please wait at least until the 19th of the month before contacting our billing department at 1-866-322-1210. At the prompt, select #1 for billing issues.



View Invoices

Group ID :

Subgroup ID : 1001

Group :

Subgroup :

Current Invoices

Invoice ID	Due Date	Invoice Period	Billed Amount	Balance Due	
182880001759	11/01/2018	11/01/2018 - 11/30/2018	\$1,880.31	\$1,880.31	Update

Historical Invoices

Invoice ID	Due Date	Invoice Period	Billed Amount	Balance Due
182710000000	10/01/2018	10/01/2018 - 10/31/2018	\$1,880.31	\$1,880.31
182270002459	09/01/2018	09/01/2018 - 09/30/2018	\$1,875.81	\$1,584.47
181960002114	08/01/2018	08/01/2018 - 08/31/2018	\$2,008.91	\$0.00
181660002326	07/01/2018	07/01/2018 - 07/31/2018	\$2,062.03	\$0.00
181350002453	06/01/2018	06/01/2018 - 06/30/2018	\$1,910.27	\$0.00
181050002268	05/01/2018	05/01/2018 - 05/31/2018	\$2,034.55	\$0.00
181000000809	04/01/2018	04/01/2018 - 04/30/2018	\$5,149.01	\$0.00
180460003339	03/01/2018	03/01/2018 - 03/31/2018	\$927.64	\$0.00
180150002387	02/01/2018	02/01/2018 - 02/28/2018	\$924.40	\$0.00
173490002420	01/01/2018	01/01/2018 - 01/31/2018	\$824.96	\$0.00
173190002509	12/01/2017	12/01/2017 - 12/31/2017	\$900.20	\$0.00
172880002432	11/01/2017	11/01/2017 - 11/30/2017	\$909.20	\$0.00

[Pay Invoice](#)

[Download to Excel](#)

View Invoice Listing

To view a current or historical invoice, please follow these steps:

1. Select the View/Update Invoice menu option from the Welcome to List Bill screen. (If your menu option is View Invoice, you do not have the correct user access to perform the update invoice function.)
2. The VIEW INVOICES screen opens.
3. Click on the [Update Instructions](#) link at the bottom of the screen to view a listing of update instructions, if necessary.
4. The most recent invoice will display under the CURRENT INVOICE section of the screen and all other invoices for the last 12 months will display under the Historical Invoices section.
5. Click <Update > for the current invoice or the [INVOICE ID](#) of an historical invoice.
6. The INVOICE OPTIONS screen opens and displays the Group and Subgroup Name and ID and the Invoice ID number.

Continued next page

Invoice Options

Group ID :

Subgroup ID :

Group Name :

Subgroup Name :

Invoice # : 182880001759

Invoice Summary Details

Subgroup Member Detail	View	Download to Excel
Subgroup Current Month Summary by Product Detail	View	Download to Excel
Group Summary by Subgroup/Product	View	Download to Excel

Return to Welcome Page
Recalculate Invoice
Return to Invoice List

Invoice Options

From the Invoice Options screen you will be able to:

- Verify Group, Subgroup and Invoice ID information.
- View the Subgroup Member Detail of an invoice by selecting the Download to Excel button.
- View or download to Microsoft Excel the SUBGROUP CURRENT MONTH SUMMARY BY PRODUCT DETAIL or SUBGROUP SUMMARY BY CLASS/PRODUCT reports.
- If you have Group level access, you will also be able to view or download to Microsoft Excel the GROUP SUMMARY BY SUBGROUP/PRODUCT report.
- View specific subscriber details on an invoice.
- Rebill a current invoice after subscribers have been added or updated.

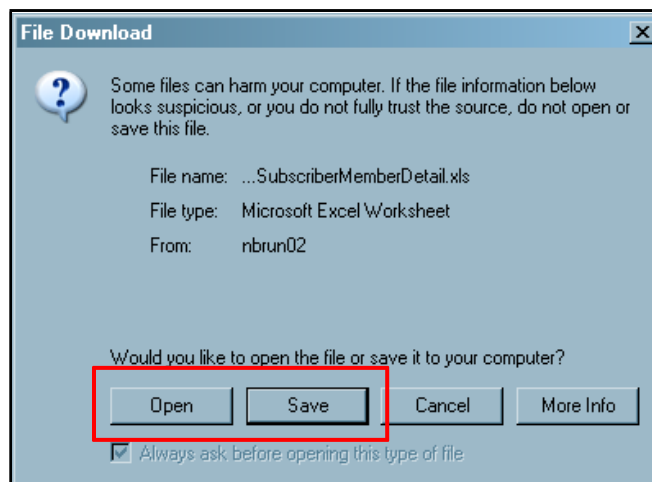
Review Current Invoice

To review the subgroup member details for the most current invoice, please follow these steps:

1. Click on the View/Update Invoice menu option at the top of the Welcome to List Bill screen to open the View Invoices screen.

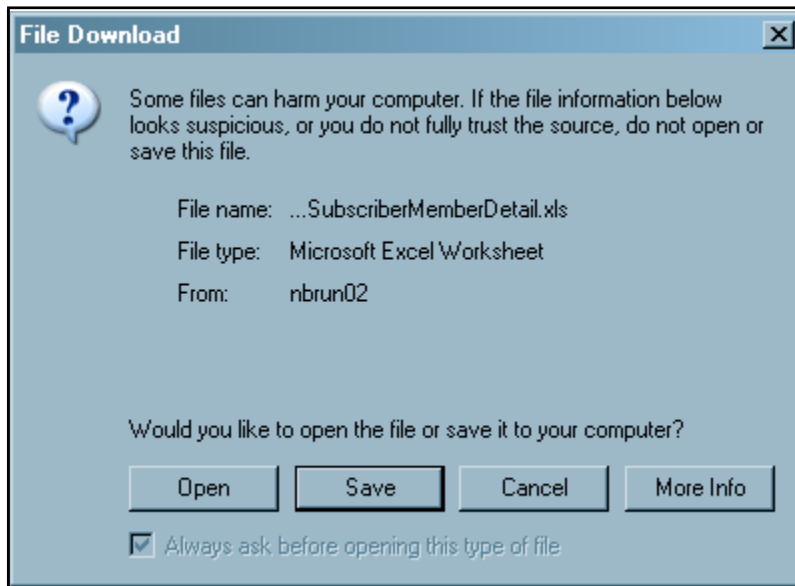


2. Click <Update > next to the current invoice to open the INVOICE OPTIONS screen.
3. Click <Download to Excel > to the right of the Subscriber Member Detail option to open the current invoice detail information into a Microsoft Excel spreadsheet.
4. The File Download window appears:



5. Click <Save > to save the SUBSCRIBER MEMBER DETAIL Excel spreadsheet file on your computer.

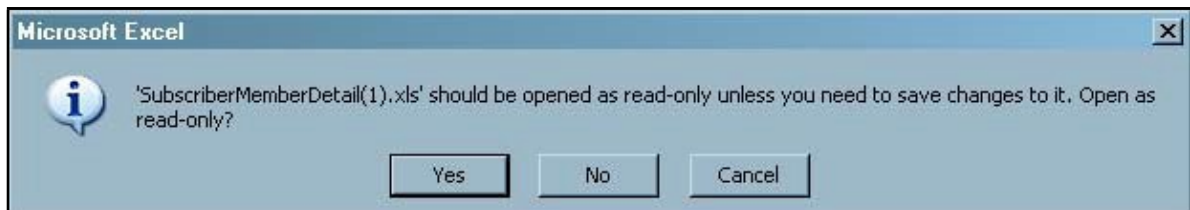
Continued next page



6. Click <Open > to open the SUBSCRIBER MEMBER DETAIL into a Microsoft Excel spreadsheet.

Important: If you do not see the Open button on the File Download window, you might not have Microsoft Excel installed on your computer.

7. A blank MS Excel spreadsheet will open with the following informational message.



8. Click <Cancel > to close the informational window without opening the SUBSCRIBER MEMBER DETAIL spreadsheet.
9. Click <Yes > to open the spreadsheet in read-only mode.

Continued next page

Subscriber ID	Subscriber/ Member Name	Class	Plan Description	Coverage Period	Coverage/ Volume	Rate	Adjustment Amt	Current Month Premium	Subscriber Total	
ABC COMPANY 1234 APPLE STREET ANYWHERE, MN 55555				Invoice #: 07010000271 Invoice Date: 1/11/2007 Coverage Period: 1/1/2007 - 1/31/2007 Group ID: 310010 Subgroup ID: 1001						
098765432	ADAMS, ALICE	All Employees	Basic Life and AD&D	1/1/2007 - 1/31/2007	50,000.00	0.380000	0.00	\$19.00		
098765432	ADAMS, ALICE	All Employees	AD&D LIFE \$ 50,000	1/1/2007 - 1/31/2007	50,000.00	0.000000	0.00	\$0.00		
098765432	ADAMS, ALICE	All Employees	SHORT TERM DISABILITY - 60% - \$500	1/1/2007 - 1/31/2007	500.00	0.510000	0.00	\$25.50		
098765432	ADAMS, ALICE	All Employees	LONG TERM DISABILITY - 60% - \$5,000 MAX	1/1/2007 - 1/31/2007	8,333.00	0.440000	0.00	\$36.67	\$81.17	
087654321	BLACK, JOSEPH	All Employees	Basic Life and AD&D	1/1/2007 - 1/31/2007	50,000.00	0.470000	0.00	\$23.50		
087654321	BLACK, JOSEPH	All Employees	AD&D LIFE \$ 50,000	1/1/2007 - 1/31/2007	50,000.00	0.000000	0.00	\$0.00		
087654321	BLACK, JOSEPH	All Employees	SHORT TERM DISABILITY - 60% - \$500	1/1/2007 - 1/31/2007	500.00	0.510000	0.00	\$25.50		
087654321	BLACK, JOSEPH	All Employees	LONG TERM DISABILITY - 60% - \$5,000 MAX	1/1/2007 - 1/31/2007	8,333.00	0.770000	0.00	\$64.16	\$113.16	
076543219	BROWN, JOHN	All Employees	Basic Life and AD&D	12/1/2006 - 12/31/2006	50,000.00	0.620000	31.00	\$0.00		
076543219	BROWN, JOHN	All Employees	Basic Life and AD&D	1/1/2007 - 1/31/2007	50,000.00	0.620000	0.00	\$10.00		
076543219	BROWN, JOHN	All Employees	AD&D LIFE \$ 50,000	12/1/2006 - 12/31/2006	50,000.00	0.000000	0.00	\$0.00		
076543219	BROWN, JOHN	All Employees	AD&D LIFE \$ 50,000	1/1/2007 - 1/31/2007	50,000.00	0.000000	0.00	\$0.00	\$31.00	
065432198	GREEN, JANE	All Employees	Basic Life and AD&D	1/1/2007 - 1/31/2007	50,000.00	0.180000	0.00	\$9.00		
065432198	GREEN, JANE	All Employees	AD&D LIFE \$ 50,000	1/1/2007 - 1/31/2007	50,000.00	0.000000	0.00	\$0.00		
065432198	GREEN, JANE	All Employees	SHORT TERM DISABILITY - 60% - \$500	1/1/2007 - 1/31/2007	403.00	0.510000	0.00	\$20.55		
065432198	GREEN, JANE	All Employees	LONG TERM DISABILITY - 60% - \$5,000 MAX	1/1/2007 - 1/31/2007	2,916.00	0.190000	0.00	\$5.54	\$35.09	
054321987	JOHNSON, RICHARD	All Employees	Basic Life and AD&D	1/1/2007 - 1/31/2007	50,000.00	0.290000	0.00	\$14.50		
054321987	JOHNSON, RICHARD	All Employees	AD&D LIFE \$ 50,000	1/1/2007 - 1/31/2007	50,000.00	0.000000	0.00	\$0.00		
054321987	JOHNSON, RICHARD	All Employees	SHORT TERM DISABILITY - 60% - \$500	1/1/2007 - 1/31/2007	500.00	0.510000	0.00	\$25.50		
054321987	JOHNSON, RICHARD	All Employees	LONG TERM DISABILITY - 60% - \$5,000 MAX	1/1/2007 - 1/31/2007	6,059.00	0.310000	0.00	\$18.78	\$58.78	
043219876	MILLER, ROBERT	All Employees	Basic Life and AD&D	1/1/2007 - 1/31/2007	50,000.00	0.290000	0.00	\$14.50		
043219876	MILLER, ROBERT	All Employees	AD&D LIFE \$ 50,000	1/1/2007 - 1/31/2007	50,000.00	0.000000	0.00	\$0.00		
043219876	MILLER, ROBERT	All Employees	SHORT TERM DISABILITY - 60% - \$500	1/1/2007 - 1/31/2007	346.00	0.510000	0.00	\$17.65		
043219876	MILLER, ROBERT	All Employees	LONG TERM DISABILITY - 60% - \$5,000 MAX	1/1/2007 - 1/31/2007	2,500.00	0.310000	0.00	\$7.75	\$39.90	
032198765	WHITE, MARY	All Employees	Basic Life and AD&D	1/1/2007 - 1/31/2007	50,000.00	0.230000	0.00	\$11.50		
032198765	WHITE, MARY	All Employees	AD&D LIFE \$ 50,000	1/1/2007 - 1/31/2007	50,000.00	0.000000	0.00	\$0.00		
032198765	WHITE, MARY	All Employees	SHORT TERM DISABILITY - 60% - \$500	1/1/2007 - 1/31/2007	500.00	0.510000	0.00	\$25.50		
032198765	WHITE, MARY	All Employees	LONG TERM DISABILITY - 60% - \$5,000 MAX	1/1/2007 - 1/31/2007	6,366.00	0.230000	0.00	\$14.64	\$51.64	
							Invoice Total:	31.00	\$410.74	\$410.74

10. The SUBSCRIBER MEMBER DETAIL spreadsheet is loaded into a Microsoft Excel workbook/worksheet and sorted by the last name of the Subscriber or Member.
11. The Microsoft Excel spreadsheet opens into a new window.
12. The spreadsheet can be manipulated, modified and saved using the Microsoft Windows Save As function.
13. To return to the INVOICE OPTIONS screen, click on the INVOICE OPTIONS tab on the bottom toolbar. Below is an example of the tab:



14. Or, close the Microsoft Excel spreadsheet.

Update Subscriber from Current Invoice

After reviewing the SUBGROUP MEMBER DETAIL on a current invoice, you will be able to update the subscriber through the INVOICE OPTION screen.

To review and/or update a specific subscriber or member on the current invoice, please follow these steps:

1. Follow the steps to open the INVOICE OPTIONS screen for the current invoice.
2. Click on the Subgroup Member Detail link from the INVOICE OPTIONS screen.

Invoice Options

Group ID :
Subgroup ID :
Group Name :
Subgroup Name :
Invoice # : 182880001759

Invoice Summary Details

[Subgroup Member Detail](#)
[Subgroup Current Month Summary by Product Detail](#)
[Group Summary by Subgroup/Product](#)

3. The SEARCH FOR SUBSCRIBER screen opens.
4. Type in the Subscribers Last Name or ID and click <Search >.

Search for Subscriber

Subscriber Last Name :
Subscriber ID :

Use the wild card % as a input for the Subscriber Last Name to see all subscribers

Click on the View Summary icon to open the SUBGROUP SUBSCRIBER MEMBER DETAIL – WITH RETROACTIVITY report for the current invoice.

Continued next page

Subgroup Subscriber Member Detail - with retroactivity

Invoice # : 182880001759
Invoice Date : 10/15/2018
Coverage Period : 11/1/2018 - 11/30/2018
Group ID : XXXXXXXXXX
Subgroup : XXXXXXXXXX
ID/Description : XXXXXXXXXX

Please review your billing detail. If a member change has occurred, please click on the subscriber name to make appropriate adjustments.

Once all adjustments have been completed, select the **Recalculate Invoice** button on the Invoice Options page.

Subscriber/Member Name	Class	Plan Description	Coverage Period	Coverage/Volume	Rate	Adjustment Amt	Current Month Premium
SMITH, JONATHAN	All Active FT Employees	Basic Life	11/1/2018 - 11/30/2018	\$50,000.00	0.0700		\$3.50
SMITH, JONATHAN	All Active FT Employees	Basic AD&D	11/1/2018 - 11/30/2018	\$50,000.00	0.0200		\$1.00
SMITH, JONATHAN	All Active FT Employees	Critical Illness: EE Non-Tobacco	11/1/2018 - 11/30/2018	\$5,000.00	0.4300		\$2.15
SMITH, JONATHAN	All Active FT Employees	Hospital Indemnity Base: EE Option A	11/1/2018 - 11/30/2018	\$1.00	17.0400		\$17.04
SMITH, JONATHAN	All Active FT Employees	Accident Base: EE	11/1/2018 - 11/30/2018	\$1.00	6.0400		\$6.04
						Invoice Total:	\$29.73

All adjustments on this page will be based on enrollment changes. No manual corrections can be done on this page.

If you have billing questions, please call: (866) 322-1210

[Return to Welcome Page](#)
[Return to Invoice List](#)
[Return to Invoice Options](#)
[Add New Subscriber](#)
[Download to Excel](#)
[Print Page](#)

Note: All adjustments on this page are based on enrollment changes. No manual corrections can be done on this page.

If adjustments must be made for this subscriber that effects the current invoice, update the subscriber information, return to the INVOICE OPTIONS screen and select the **Recalculate Invoice** button.

5. Click on the name link under the SUBSCRIBER/MEMBER NAME column to open the UPDATE SUBSCRIBER screen for the selected subscriber or member.
6. Follow the Update Subscriber steps to make the necessary changes. See Chapter 3 List Bill e-Bill Processing, Section 3: Updating Existing Subscribers for more detailed information

Request for Rebill

If subscriber updates have been made and/or new subscribers have been added that will change the premium due for the current invoice, you may submit a request for rebill.

To submit a request to rebill the current invoice, please follow these steps:

1. Click on the View/Update Invoice menu option at the top of the WELCOME TO LIST BILL screen.
2. The VIEW INVOICES screen opens.
3. Click <Update > at the right-hand side of the current invoice to open the INVOICE OPTIONS screen.
4. Click <Recalculate Invoice> to submit the request to rebill the current invoice.

Group ID : [REDACTED]
Subgroup ID : [REDACTED]
Group Name : [REDACTED]
Subgroup Name : [REDACTED]
Invoice # : 182880001759

Invoice Summary Details

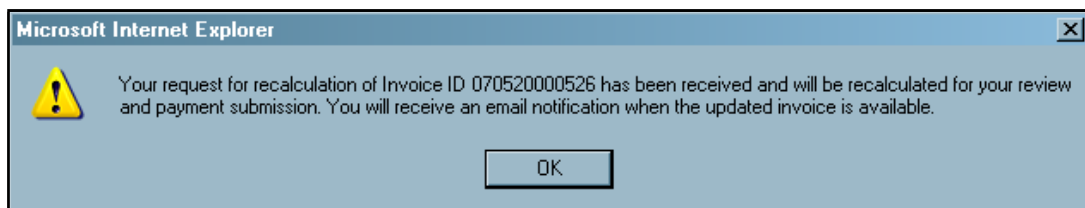
[Subgroup Member Detail](#) View Download to Excel

[Subgroup Current Month Summary by Product Detail](#) View Download to Excel

[Group Summary by Subgroup/Product](#) View Download to Excel

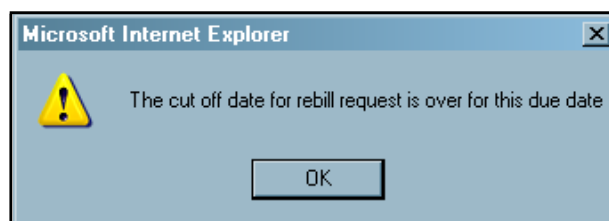
Return to Welcome Page **Recalculate Invoice** Return to Invoice List

5. The confirmation pop-up message will appear. For example:



6. The billing batch run is usually on the 15th of each month. If the system date is three days prior to the next billing batch run, you may receive the following message instead:

- 7.



Continued next page

8. You can only recalculate an invoice up to three times between each billing batch run date. If you attempt to recalculate more than 3 times, an error message will appear. For example:

Your request for recalculation of Invoice ID #XXXXXXXX cannot be processed at this time. Recalculations of invoices are limited to 3 times. Please contact us at 1-866-322-1210 for assistance. Select option # 1 at the prompt.

Subgroup Summary Reports

There are two other subgroup reports available on the INVOICE OPTIONS screen. If you have subgroup level access, the SUBGROUP CURRENT MONTH SUMMARY BY PRODUCT DETAIL and SUBGROUP SUMMARY BY CLASS/PRODUCT report is available for your review.

To review the subgroup summary reports, please follow these steps:

1. Select the View/Update Invoice menu option from the WELCOME TO LIST BILL screen.
2. The VIEW INVOICES screen opens.
3. Click <Update > for the current invoice or the Invoice ID link for an historical invoice.
4. The INVOICE OPTIONS screen opens for the selected invoice.

The screenshot displays the 'Invoice Options' interface. At the top, a dark blue header contains the title 'Invoice Options'. Below this, a list of fields is shown: 'Group ID', 'Subgroup ID', 'Group Name', and 'Subgroup Name', each followed by a colon and a greyed-out box. The 'Invoice #' field is populated with the value '182880001759'. A light grey section titled 'Invoice Summary Details' contains three rows of links: 'Subgroup Member Detail', 'Subgroup Current Month Summary by Product Detail', and 'Group Summary by Subgroup/Product'. Each link is accompanied by a 'View' button and a 'Download to Excel' button. The 'Subgroup Current Month Summary by Product Detail' link and its corresponding buttons are circled in orange. At the bottom of the screen, three buttons are visible: 'Return to Welcome Page', 'Recalculate Invoice', and 'Return to Invoice List'.

5. Click <View > for the subgroup summary report to display on the screen.

Continued next page

Note: For examples of the subgroup summary reports, see the next page.

6. From the report screen, click <Download to Excel > to open the report in a Microsoft Excel spreadsheet. You will be able to manipulate, save or print the report using the Microsoft Windows functionality.
7. Or, click <Print Page> to send the report to your local printer.
8. Or, click <Return to Invoice Options> to select a different report or view the SUBGROUP MEMBER DETAIL.

9. Or, click <Return to Invoice List> to select a different invoice.
10. Or, click <Return to Welcome Page> to return to the WELCOME TO LIST BILL screen.

- **Subgroup Current Month Summary by Product Detail:**

Subgroup Current Month Summary By Product Detail

Invoice # : 182710000000

Invoice Date : 9/28/2018

Coverage Period : 10/1/2018 - 10/31/2018

Group ID :

Subgroup ID :

Historical Invoice Summary

Plan Description	Count	Current Period Volume	Rate	Total Amount Due
Basic Life	114	\$5,657,499.00	0.0700	\$396.03
Total - Basic Life	114	\$5,657,499.00		\$396.03
Basic AD&D	114	\$5,657,499.00	0.0200	\$113.15
Total - Basic AD&D	114	\$5,657,499.00		\$113.15
Supp Life				
Ages 25 - 29	2	\$200,000.00	0.0550	\$11.00
Ages 30 - 34	4	\$350,000.00	0.0650	\$22.75
Ages 35 - 39	3	\$200,000.00	0.0920	\$18.40
Ages 40 - 44	3	\$140,000.00	0.1420	\$19.88
Ages 45 - 49	4	\$310,000.00	0.2260	\$70.06
Ages 50 - 54	3	\$250,000.00	0.3580	\$89.50
Ages 55 - 59	2	\$150,000.00	0.5410	\$81.15
Total - Supp Life	21	\$1,600,000.00		\$312.74
Supp AD&D	21	\$1,600,000.00	0.0200	\$32.00
Total - Supp AD&D	21	\$1,600,000.00		\$32.00
Invoice Total Amount Due:				\$1,880.31

If you have billing questions, please call: (866) 322-1210

Return to Welcome Page
Return to Invoice List
Return to Invoice Options
Download to Excel
Print Page

Group Summary Report

Invoice Options

Group ID :
Subgroup ID :
Group Name :
Subgroup Name :
Invoice # : 182880001759

Invoice Summary Details

Subgroup Member Detail	<input type="button" value="View"/>	<input type="button" value="Download to Excel"/>
Subgroup Current Month Summary by Product Detail	<input type="button" value="View"/>	<input type="button" value="Download to Excel"/>
Group Summary by Subgroup/Product	<input type="button" value="View"/>	<input type="button" value="Download to Excel"/>

If you have group level access, the GROUP SUMMARY BY SUBGROUP DETAIL report is available for your review.

To review the group summary by subgroup report, please follow these steps:

11. Select the View/Update Invoice menu option from the WELCOME TO LIST BILL screen.
12. The VIEW INVOICES screen opens.
13. Click <Update > for the current invoice or the Invoice ID link for an historical invoice.
14. The INVOICE OPTIONS screen opens for the selected invoice.
15. Click <View > for the report to display on the screen.

Note: For an example of the report, see the next page.

16. From the report screen, click <Download to Excel > to open the report into a Microsoft Excel file.
17. Or, click <Print Page> to send the report to your local printer.
18. Or, click <Return to Invoice Options> to select a different report or view the SUBGROUP MEMBER DETAIL.
19. Or, click <Return to Invoice List> to select a different invoice.
20. Or, click <Return to Welcome Page> to return to the WELCOME TO LIST BILL screen.

- **Group Summary by Subgroup/Products:**

Group Summary by Subgroup/Product				
		Coverage Period : 10/1/2018 - 10/31/2018		
		Group ID : 		
Group Invoice Summary				
Subgroup ID/Description	Plan Description	Adjustments	Current	Total
1001 - MACKIE WOLF ZIENTZ & MANN				
	Accident Base/Enhanced: EE		\$55.00	\$55.00
	Accident Base/Enhanced: EE+CH		\$28.08	\$28.08
	Accident Base/Enhanced: EE+SP		\$17.52	\$17.52
	Accident Base/Enhanced: Family		\$82.24	\$82.24
	Accident Base: EE		\$30.20	\$30.20
	Accident Base: EE+CH		\$13.20	\$13.20
	Accident Base: Family		\$20.80	\$20.80
	Basic AD&D		\$113.15	\$113.15
	Basic Life		\$396.03	\$396.03
	Critical Illness: CH \$2,500		\$1.05	\$1.05

Section 6: Paying an Invoice

PURPOSE

This section provides detailed information regarding paying an invoice using the e-Bill Services system. You have the option to print the invoice and pay by mail, pay each month electronically or setup payment method Scheduled Direct Debit.

To pay your invoice electronically, you must provide bank information and authorization by submitting an Electronic Payment Authorization form. See Chapter X for more detailed information on obtaining the proper form.

To schedule Direct Debits for invoiced amounts that occur automatically each monthly based upon "Payment Date" selection during the setup process, on either the 10th or the 25th calendar day of the month.

BEFORE YOU BEGIN

Login to the e-Bill Services system and opening the WELCOME TO LIST BILL screen.

View Invoices

Group ID :
Subgroup ID :
Group :
Subgroup :

Current Invoices				
Invoice ID	Due Date	Invoice Period	Billed Amount	Balance Due
202290001018	09/01/2020	09/01/2020 - 09/30/2020	\$1,009.20	\$593.80

Historical Invoices				
Invoice ID	Due Date	Invoice Period	Billed Amount	Balance Due
201970001340	08/01/2020	08/01/2020 - 08/31/2020	\$975.12	\$0.00
201670001288	07/01/2020	07/01/2020 - 07/31/2020	\$955.04	\$0.00
201360000966	06/01/2020	06/01/2020 - 06/30/2020	\$967.12	\$0.00
201060001028	05/01/2020	05/01/2020 - 05/31/2020	\$967.12	\$0.00
200750001087	04/01/2020	04/01/2020 - 04/30/2020	\$907.22	\$0.00
200470001350	03/01/2020	03/01/2020 - 03/31/2020	\$751.03	\$0.00
200360000326	02/01/2020	02/01/2020 - 02/29/2020	(\$382.54)	\$0.00
193490001198	01/01/2020	01/01/2020 - 01/31/2020	\$2,002.87	\$0.00
193190001428	12/01/2019	12/01/2019 - 12/31/2019	\$2,216.48	\$0.00
192880001571	11/01/2019	11/01/2019 - 11/30/2019	\$2,102.76	\$0.00
192580001325	10/01/2019	10/01/2019 - 10/31/2019	\$2,310.05	\$0.00
192270001499	09/01/2019	09/01/2019 - 09/30/2019	\$2,351.55	\$0.00

Manage Payment Method
Pay Invoice
Download to Excel

Click here to open the [Update Instructions](#) screen

Payment Options

Group ID : [REDACTED]
Group : [REDACTED]
Subgroup ID : [REDACTED]
Subgroup : [REDACTED]

Amount Due : **\$5,345.09**

[Get Adobe Reader](#)

[Print Remittance Form](#)

[Make Online Payment](#)

[Return to View Invoices](#)

To view and/or print the Remittance Form Adobe® Acrobat® Reader® must be installed on your computer. To make an on-line payment the Electronic Payment Authorization form must be submitted to the billing department prior to using the Make Online Payment option.

Pay Invoice by Mail

To pay your invoice by mail, please follow these steps:

1. Click on the View/Update Invoice menu option at the top of the screen to open the VIEW INVOICES screen.
2. Click <Pay Invoice> at the bottom of the screen to open the PAYMENT OPTIONS screen.
3. To pay with a check, click <Print Remittance Form>.

Note: You must have Adobe Acrobat Reader installed on your computer to view and print the remittance form.

Premium Invoice Remittance Summary



Group ID: [REDACTED]
Subgroup ID: [REDACTED]

Payment Due Date: 11/1/2018

Invoice ID	Coverage Period	Amount
[REDACTED]	09/01/2018 - 09/30/2018	\$1,584.47
[REDACTED]	10/01/2018 - 10/31/2018	\$1,880.31
[REDACTED]	11/01/2018 - 11/30/2018	\$1,880.31
Total Premium Due : PLEASE PAY AMOUNT AS BILLED		\$5,345.09
Payment Amount		\$5,345.09

Make Checks Payable To: UNITEDHEALTHCARE

Return Payment To:
UnitedHealthcare
PO Box 860511
Minneapolis, MN 55486-0511

If you are paying by check, please return this page along with your payment to the address above.

If you have billing questions, please call 1-866-322-1210

Continued on next page

4. The Premium Invoice Remittance Summary appears as a Portable Document Format (PDF) file.
5. The remittance summary will display all the invoices that are currently unpaid in the following format:
 - Invoice Number
 - Coverage Period
 - Invoice Amount Due
 - Total Premium Due
6. Click on the Print icon on the Adobe Acrobat Reader toolbar to print the remittance summary in landscape. Be sure to return the remittance summary with your payment.
7. Mail your Payment to the address provided at the bottom of the invoice.
8. Or, for Overnight payments use the following address

Unimerica Life Insurance Company of New York
 Lockbox 860511
 1200 Energy Park Drive
 St. Paul, MN 55108

Make Online Payment

Payment Options

Group ID :

Group :

Subgroup ID :

Subgroup :

Amount Due : **\$5,345.09**

Get Adobe Reader

Print Remittance Form

Make Online Payment

Return to View Invoices

To view and/or print the Remittance Form Adobe® Acrobat® Reader® must be installed on your computer. To make an on-line payment the Electronic Payment Authorization form must be submitted to the billing department prior to using the Make Online Payment option.

To make an online payment, please follow these steps:

1. Click on the Make Online Payment button on the PAYMENT OPTIONS screen.
2. The address to send the form is located in the Contact Us menu item. You will need to provide the following account information:
 - Bank Name, Address and Phone
 - Bank Routing Number
 - Your Account Name, Number and Type
 - Authorized Signer Name, Phone Number and email address
 - The Make Online Payment screen opens.

Continued next page

Important Note: To make an electronic payment, the Electronic Payment Authorization Form must be completed, signed and mailed to the billing department. See **Chapter 3: Forms Library System, Topic: Electronic Payment Authorization Form** to learn how to obtain a copy of the form.

Make Online Payment		Due Date	Total Amount Due
Group ID :		09/01/2020	\$7,528.07
Group Name :			
Subgroup ID :			
Subgroup Name :			
Amount Due :	\$7,528.07		
Date to Submit Payment :	<input type="text"/>		
Payment Amount :	<input type="text"/>		
Bank Name :	Old		
Account Number :	#####		
Routing Number :	#####		

Payments requested for the same day that are made prior to 3:30 PM CT will be credited to your account today and show a receipt date in e-Bill the next business day. Payments requested for the same day that are made on or after 3:30 PM CT will be credited to your account the next day and have a receipt date in e-Bill two business days later. When selecting a future payment date, your account will be credited on the same day and show a receipt date in e-Bill the next business day.

3. The BANK NAME, ACCOUNT NUMBER and ROUTING NUMBER fields are populated with your bank information when you have set up this option with our Billing Department. You will not be able to enter this information on-line.
4. If the bank information has not been previously set up with the billing department, you will receive the following message at the top of the MAKE ONLINE PAYMENT screen: **Your bank information was not found. Please submit the Electronic Payment Authorization form to our Billing Department.** You will not be able to continue with the on-line payment process.
5. Verify the amount due matches the outstanding amount due for all your online invoices. If there is a discrepancy, contact our Billing Administrator.

Continued next page

6. Click on the PAYMENT AMOUNT field and type in the actual amount of your payment.
7. Click on the down arrow at the end of the DATE TO SUBMIT PAYMENT field to open the pop-up calendar.
8. Select the date of the month the money will be transferred from your account to our billing team. The payment date must be a business day.
9. Click on the \geq arrow on the pop-up calendar to change to the following month.
10. Please review the selecting a payment date information in red text at the bottom of the screen.
11. Click on the Submit Payment button on the MAKE ONLINE PAYMENT screen to submit your online payment.
12. Or, click on the Cancel button to close the MAKE ONLINE PAYMENT screen and return to the PAYMENT OPTIONS screen.
13. When you submit your online payment the confirmation window opens.
14. A PAYMENT CONFIRMATION NUMBER is created and displayed on the confirmation window.
15. Please print the screen for your records, if necessary.
16. Click <Back to View Invoice> to close the confirmation screen and return to the VIEW INVOICES screen.

Payment Confirmation Details

Payment Details

Payment Confirmation Number	:	29756
Group ID	:	
Group Name	:	
Subgroup ID	:	
Subgroup Name	:	
Amount Paid	:	
Payment Date	:	08/19/2020

Bank Details

Bank Name	:	Old
Account Number	:	
Routing Number	:	

Back To View Invoice

Scheduled Direct Debit ACH – Add Account

- Allowed three transaction daily, any combination of "Add, Update or Cancel".

UnitedHealthcare® eAdministration Welcome,

AMERICAN COU... Home Select Subgroup Add Subscriber Update Subscriber **View/Update Invoice** Payment History Change Password Contact Us Log Off

View Invoices

Group ID :
Subgroup ID :
Group :
Subgroup :

Current Invoices				
Invoice ID	Due Date	Invoice Period	Billed Amount	Balance Due
201970000091	08/01/2020	08/01/2020 - 08/31/2020	\$106.25	\$106.25

[Update](#)

Historical Invoices				
Invoice ID	Due Date	Invoice Period	Billed Amount	Balance Due
20187000030Z	07/01/2020	07/01/2020 - 07/31/2020	\$101.51	\$101.51
201360000170	06/01/2020	06/01/2020 - 06/30/2020	\$101.51	\$101.51
201060000212	05/01/2020	05/01/2020 - 05/31/2020	\$101.51	\$23.77
20075000003Z	04/01/2020	04/01/2020 - 04/30/2020	\$101.51	\$0.00
20047000003Z	03/01/2020	03/01/2020 - 03/31/2020	\$101.51	\$0.00
200150000190	02/01/2020	02/01/2020 - 02/29/2020	\$101.51	\$0.00
193490000345	01/01/2020	01/01/2020 - 01/31/2020	\$128.32	\$0.00
193190000224	12/01/2019	12/01/2019 - 12/31/2019	\$128.32	\$0.00
192880000255	11/01/2019	11/01/2019 - 11/30/2019	\$128.32	\$0.00
192580000046	10/01/2019	10/01/2019 - 10/31/2019	\$128.32	\$0.00
192270000180	09/01/2019	09/01/2019 - 09/30/2019	\$128.32	\$0.00
191960000253	08/01/2019	08/01/2019 - 08/31/2019	\$128.32	\$0.00

[Manage Payment Method](#) [Pay Invoice](#) [Download to Excel](#)

PAYMENT METHOD LIST

Group ID :
Group Name :
Subgroup ID :
Subgroup Name :

[Add Scheduled Direct Debit Payment Method](#) [Return To View Invoices](#)

Payment Method List

There are no payment methods to display

UnitedHealthcare® eAdministration Welcome,

Add/Update/Delete Payment Account Information

Group ID :
Group Name :
Select Subgroup ID's : 1002
1003
1004
1005
1006
1007
1008 >> <<

Payment Type : **Scheduled Direct Debit**

Routing Number ** :

Bank Name ** :

Account Name ** :

Account Number ** :

Confirm Account Number ** :

Financial % Institution : **100**

Account Type ** : Checking Savings

Payment Date ** : 10th of Every Month 25th of Every Month

I accept the terms and conditions

[Add Account](#) [Return To Manage Payment Method](#)

1. Select **View/Update Invoice**, menu option
2. Select **Manage Payment Method**, button at bottom of screen.
3. Select **Add Scheduled Direct Debit Payment Method**, button
4. Select **Subgroup** or **Multiple Subgroups**, that will use the same Account Information
 - a. Select >>, double arrows pointing right to **Add**
 - b. Select <<, double arrows pointing left to **Remove**
5. Enter All Required Fields, (if incorrect Routing number entered more than two times, prompted to try again later or at another time)
 - Routing Number
 - Bank Name (will auto populate after valid routing number has been entered)
 - Account Name
 - Account Number
 - Confirm Account Number
 - Account Type
 - Payment Date
6. Click box next to **"I Accept the terms and conditions"** link, read and review then close page or you may return to eAdministrative URL tab.
7. Click **Check box** next to "I Accept the Terms and Condition"
8. Select **Add Account**

Scheduled Direct Debit ACH – Update Account

- Allowed three transaction daily, any combination of **"Add, Update or Cancel"**.

PAYMENT METHOD LIST									
Group ID	:								
Group Name	:								
Subgroup ID	:								
Subgroup Name	:								
<input type="button" value="Add Scheduled Direct Debit Payment Method"/> <input type="button" value="Return To View Invoices"/>									
Payment Method List									
Account Description	Payment Type	Account Type	Account Number	Routing Number	Percent	Payment Date	Customer Number - Bill Group		Last Modified
CITY	Scheduled Direct Debit	CHKG	000 000 000 1234	000 000 000 13958	100%	10th	3	- 2	7/1/2020 9:25:53 AM

Add/Update/Delete Payment Account Information

Group ID : _____

Group Name : _____

Select Subgroup ID's : 3215
3202
3318
3194
3181
3178
3074
3069
3068 >> << 3041

Payment Type : **Scheduled Direct Debit**

Bank Name :

Account Name :

Account Number :

Confirm Account Number :

Routing Number :

Confirm Routing Number :

Financial % Institution :

Account Type : Checking Savings

Payment Date : Every Month 10th Every Month 25th

I accept the terms and conditions

Update Account
Delete Account
Return To Manage Payment Method

1. Select **View/Update Invoice**, menu option
2. Select **Manage Payment Method**, button at bottom of screen.
3. Select **Account Description**, for Subgroup you want to update
4. Select **Subgroup** or **Multiple Subgroups**, that will use the same Account Information
 - a. Select >>, double arrows pointing right to **Add**
 - b. Select <<, double arrows pointing left to **Remove**
5. Enter All Required Fields, (if incorrect Routing number entered more than two times, prompted to try again later or at another time)
 - Routing Number
 - Bank Name (will auto populate after valid routing number has been entered)
 - Account Name
 - Account Number
 - Confirm Account Number
 - Account Type
 - Payment Date
6. Select Click box next to **"I Accept the terms and conditions" link**, read and review then close page or you may return to eAdministrative URL tab.
7. Click **Check box** next to "I Accept the Terms and Condition"
8. Select **Update Account**

Scheduled Direct Debit ACH – Cancel Account

*Allowed three transaction daily, any combination of "Add, Update or Cancel".

PAYMENT METHOD LIST

Group ID :
 Group Name :
 Subgroup ID :
 Subgroup Name :

Payment Method List

Account Description	Payment Type	Account Type	Account Number	Routing Number	Percent	Payment Date	Customer Number - Bill Group	Last Modified
CITY	Scheduled Direct Debit	CHKG	*****1234	*****13958	100%	10th	3 - 2	7/1/2020 9:25:53 AM

Add/Update/Delete Payment Account Information

Group ID :
 Group Name :
 Select Subgroup ID's :

3215
3202
3318
3194
3181
3178
3074
3069
3068

3041

Payment Type : **Scheduled Direct Debit**

Bank Name :

Account Name :

Account Number :

Confirm Account Number :

Routing Number :

Confirm Routing Number :

Financial % Institution :

Account Type : Checking Savings

Payment Date : Every Month 10th Every Month 25th

I accept the terms and conditions

1. Select **View/Update Invoice**, menu option
2. Select **Manage Payment Method**, button at bottom of screen.
3. Select **Account Description**, for Subgroup you want to Cancel
4. Select **Subgroup** or **Multiple Subgroups**,
 - a. Select >>, double arrows pointing right to **Add**
 - b. Select <<, double arrows pointing left to **Remove**
5. Select Click box next to **"I Accept the terms and conditions"** link, read and review then close page or you may return to eAdministrative URL tab.
6. Click **Check box** next to "I Accept the Terms and Condition"
7. Select **Delete Account**

Section 7: Payment History

Payment History

Group ID :
 Subgroup ID :
 Group Name :
 Subgroup Name :

History Details				
Received Date	Payment Method	Receipt Type	Check Number	Amount
8/21/2018	Check	Payment	152595	\$2,008.91
7/31/2018	Check	Payment	152346	\$2,062.03
7/24/2018	Check	Payment	152268	\$3,944.82
5/23/2018	Check	Payment	151662	\$5,149.01
4/24/2018	Check	Payment	151382	\$927.64
3/5/2018	Check	Payment	150832	\$1,749.36
1/17/2018	Check	Payment	150245	\$900.20
1/4/2018	Check	Payment	150189	\$909.20
11/27/2017	Check	Payment	149735	\$886.02

Download to Excel

Payment History

To review the payment history for your subgroup, please follow these steps:

1. Click on the Payment History menu option at the top of the WELCOME TO LIST BILL screen.
2. The PAYMENT HISTORY screen opens.
3. Click <Download to Excel > to load the information into a Microsoft Excel spreadsheet.
4. Click on the date link under the RECEIVED DATE column to open the RECEIPT DETAIL screen.
5. Review the receipt detail for the specified received date.
6. Click <Return to Payment History> to close the screen and return to the PAYMENT HISTORY screen.

If you have any questions regarding your payment history, please contact the billing department at 1-866-322-1210. At the prompt, select #1 for billing issues.

CHAPTER 3: FORMS LIBRARY SYSTEM

PURPOSE

This chapter provides detailed information regarding the Forms Library System. Most of the forms identified in the Administration Manual are accessible through the *eAdministration* website.

As an external user, the user ID assigned to you will identify the appropriate Contract Situs State and Underwriting Company necessary to provide a listing of available forms.

The list of forms can be restricted by selecting one of the following categories:

- Administrative Guide
- Beneficiary Forms
- Claim Forms
- Conversion & Portability Forms
- Enrollment Forms
- Evidence of Insurability (EOI) Forms
- Miscellaneous Forms

BEFORE YOU BEGIN

Login to the *eAdministration* Home page.

Opening Forms Library

username
Home
Log out
Change Password
e-Bill Services
Forms Library
Report Portal

Forms
Contract Situs State: MINNESOTA *
Underwriting Company: United Healthcare Insurance Company *
Category:
Form:

Important Note: The forms displayed here are based on the situs state and underwriting company for the group assigned to your user id. Some of these forms may not be applicable. Please confirm that your group has purchased the appropriate product associated with the form prior to using. Refer to your group policy and individual certificate for verification.

Actions
Search

Results

Name	Category
Administration Manual (All Sections)	Administration Manual
Administration Manual (Critical Illness Section)	Administration Manual
Administration Manual (e-Bill System Section)	Administration Manual
Administration Manual (EAP Section)	Administration Manual
Administration Manual (Life Policies Section)	Administration Manual
Administration Manual (List Bill e-Bill Processing Section)	Administration Manual
Administration Manual (List Billed Group Section)	Administration Manual
Administration Manual (LTD Section)	Administration Manual
Administration Manual (On-line Forms Section)	Administration Manual

You will access the FORMS LIBRARY from the *eAdministration* HOME screen.

To open the Forms Library, please follow these steps:

1. Follow the steps to open the eAdministration HOME screen. See Chapter 1: System Overview, Section 2: Getting Started, topic: Opening eAdministration for more detailed information.
2. The eAdministration HOME menu displays a list of applications and/or functions you have access to. For example:
 - Log out
 - Change Password
 - My Profile
 - e-Bill Services
 - Forms Library (if assigned to the userid)
 - Report Portal (if assigned to the userid)
3. Click on the Forms Library link to open the FORMS screen.
4. The CONTRACT SITUS STATE and UNDERWRITING COMPANY fields are disabled and are for display only. These fields are populated based on the Contract Situs State and Underwriting Company associated with the group assigned to the user id.

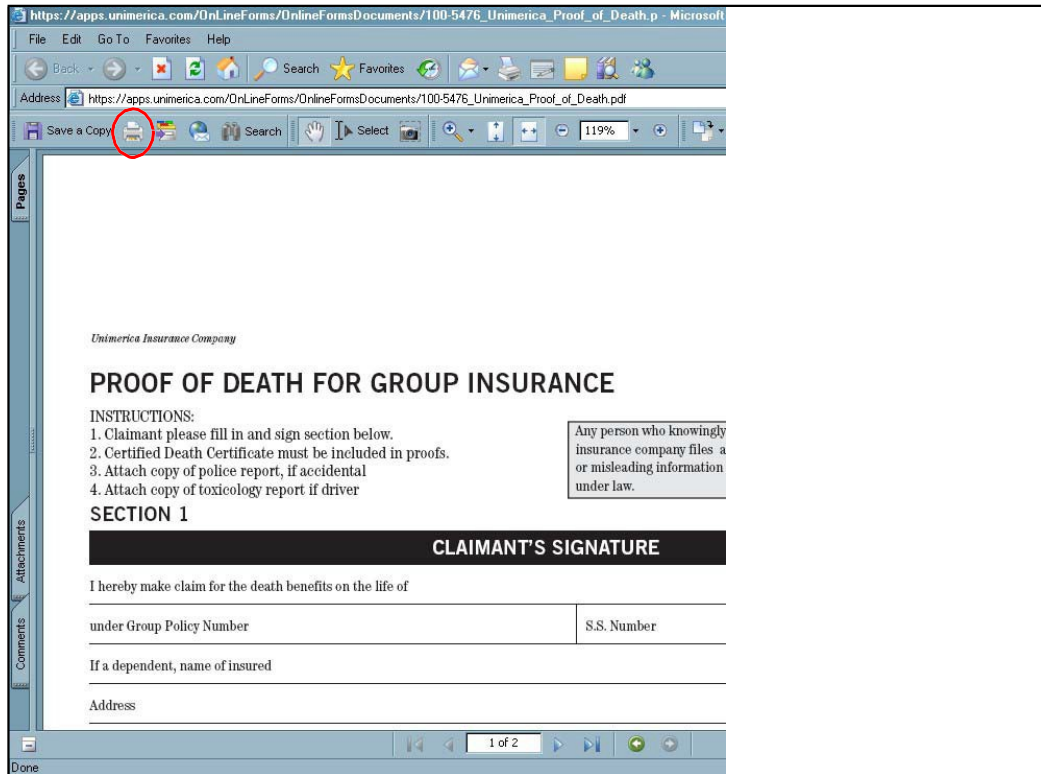
Important Note: Some of these forms may not be applicable. Please confirm that your group has purchased the appropriate product associated with the form prior to using. Refer to your group policy and individual certificate for verification.

5. Click <Search> to display a listing of all the available forms. Each form will display as a link.
6. Click on the appropriate form name/link to open the form in a Portable Document

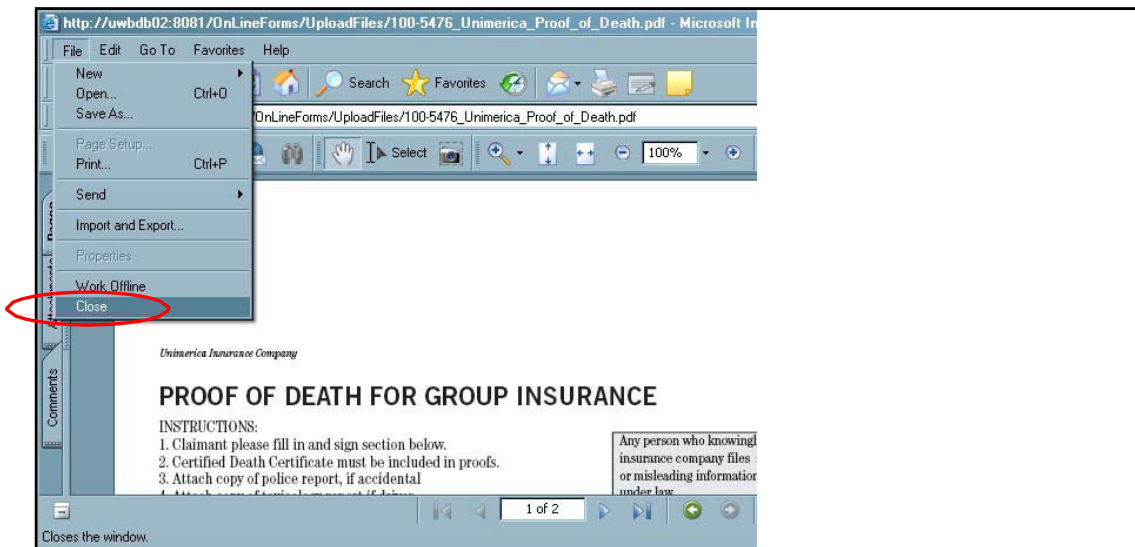
Continued next page

Format (PDF) into a separate window.

7. To print the form, click on the printer icon on the Adobe Acrobat Reader toolbar.



8. To close the Adobe Acrobat Reader window, click on the 'X' at the top right-hand side of the window, or click on the File menu option then click on the Close option.



Continued next page

9. To log out of the FORMS Library and *eAdministration* system, click on the Log out link on the menu list located on the left-hand side of the FORMS screen.
10. When you select the Log-out link, or have timed out of the website, the Log In screen will display.

username
Home
Log out
Change Password
e-Bill Services
Forms Library
Report Portal

Forms
Contract Situs State: MINNESOTA *
Underwriting Company: United Healthcare Insurance Company *
Category: [Open dropdown menu]
Form: [Open dropdown menu]
Important Note: [Partial text visible on right]

Actions
Search
Results

Category dropdown options:
Administration Manual
Beneficiary Forms
Claim Forms
Conversion & Portability Forms
Do Not Use
Enrollment Forms
Evidence of Insurability (EOI) Forms
Miscellaneous

Search on a Category

To limit the results form listing by category, please follow these steps:

1. Log on into the Forms Library system to open the FORMS screen.
2. The CONTRACT SITUS STATE and UNDERWRITING COMPANY are automatically populated based on the group assigned to your user id.
3. Click on the CATEGORY field down arrow to open the drop-down list.
4. Click on an option from the category drop-down menu list.
5. Click <Search > to create a list of available forms based on the category selected.
6. The list of available forms will display in the Results area based on the Contract Situs State, Underwriting Company and Category. In this example, the Claim Forms category was used.

Forms

Contract Situs State: MINNESOTA*

Underwriting Company: United Healthcare Insurance Company*

Category: Claim Forms

Form:

Important Note: The forms displayed here are based on the situs state and underwriting company for the group assigned to your user id. Some of these forms may not be applicable. Please confirm that your group has purchased the appropriate product associated with the form prior to using. Refer to your group policy and individual certificate for verification.

Actions

Results

Name	Category
Claimant Statement for STD/LTD	Claim Forms
Critical Illness Claim Form Package	Claim Forms
Critical Illness Health Screening Benefit Claim Form	Claim Forms
LTD Claim Package	Claim Forms
STD Claim Package	Claim Forms
United HealthCare Notice of Claim for Accelerated Benefits	Claim Forms
United HealthCare Proof of Death for Group Insurance	Claim Forms
United HealthCare Statement of Claim for Accidental Dismemberment	Claim Forms
United HealthCare Waiver of Premium Claim Form	Claim Forms

Forms

Contract Situs State: MINNESOTA*

Underwriting Company: United Healthcare Insurance Company*

Category:

Form:

Important Note: The forms displayed here are based on the situs state and underwriting company for the group assigned to your user id. Some of these forms may not be applicable. Please confirm that your group has purchased the appropriate product associated with the form prior to using. Refer to your group policy and individual certificate for verification.

Actions

Results

Name	Category
STD Claim Package	Claim Forms

Search by Form Name

If you know the exact name of the form you need, search by the form name by following these steps:

1. Click on the Forms Library link on the *eAdministration* HOME screen to open the FORMS screen.
2. Click on the FORM field and type in the exact name of the form.
3. Click <Search> to display the form as a link under the Results section.

<p>username</p> <ul style="list-style-type: none"> Home Log out Change Password e-Bill Services Forms Library Report Portal 	<p>Forms</p> <p>Contract Situs State: <input type="text" value="MINNESOTA"/>*</p> <p>Underwriting Company: <input type="text" value="United Healthcare Insurance Company"/>*</p> <p>Category: <input type="text" value="Miscellaneous"/></p> <p>Form: <input type="text"/></p> <p>Important Note: The forms displayed here are based on the situs state assigned to your user id. Some of these forms may not have purchased the appropriate product associated with policy and individual certificate for verification.</p> <p>Actions</p> <p><input type="button" value="Search"/></p> <p>Results</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Category</th> </tr> </thead> <tbody> <tr> <td>Electronic Payment Authorization Form</td> <td>Miscellaneous</td> </tr> </tbody> </table>	Name	Category	Electronic Payment Authorization Form	Miscellaneous
Name	Category				
Electronic Payment Authorization Form	Miscellaneous				

Electronic Payment Authorization Form

To print the Electronic Payment Authorization form, please follow these steps:

1. Click on the Forms Library link on the *eAdministration* HOME screen to open the FORMS screen.
2. Click on the CATEGORY down arrow to open the drop-down menu list.
3. Click on the Miscellaneous option from the drop-down menu list.
4. Click <Search> to display the Electronic Payment Authorization form as a link under the Results section.
5. Click on the [Electronic Payment Authorization Form](#) link to open the form in Adobe Acrobat Reader.
6. Click on the printer icon on the Adobe Acrobat Reader toolbar to send the form to your local printer.
7. Click on the "X" at the top right-hand side of the window to close the Adobe Acrobat Reader window.
8. Or, click on the File menu option at the top toolbar, then click on the Close option.

CHAPTER 4: REPORT PORTAL SYSTEM

PURPOSE

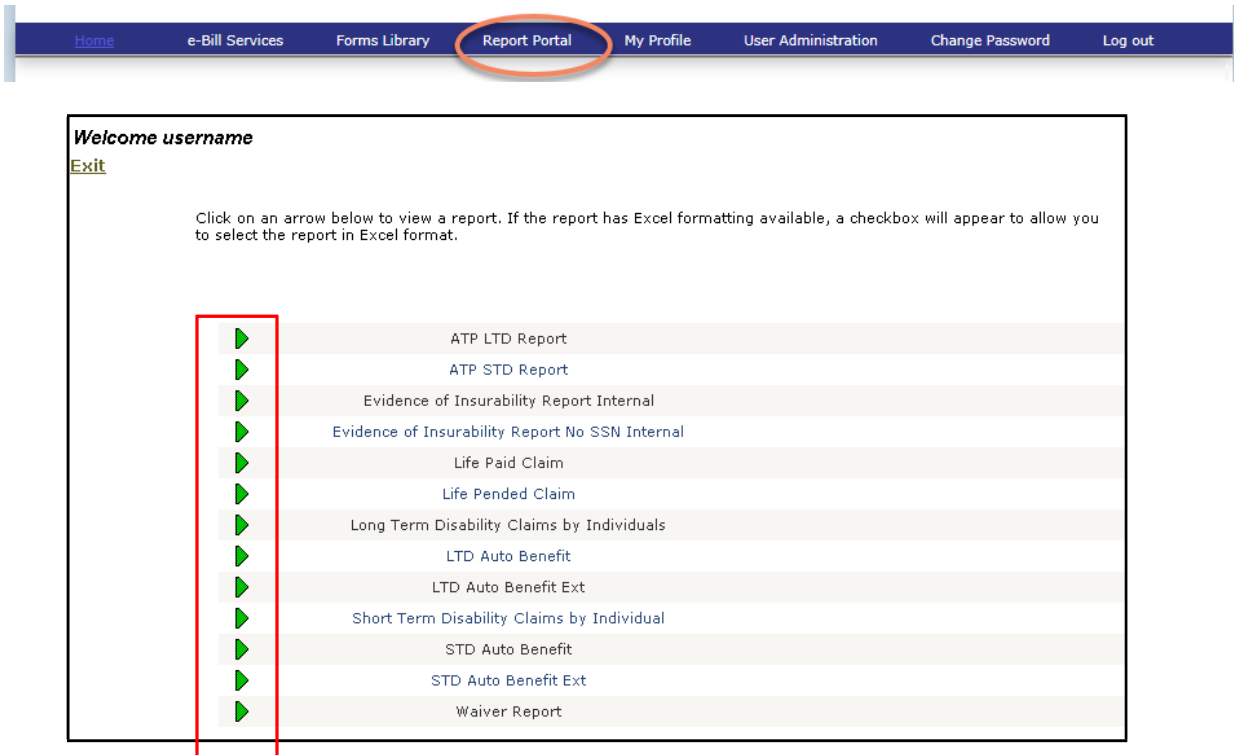
This chapter provides detailed information regarding the Report Portal system on our *eAdministration* website.

We have developed several reports that are accessible through our website. As an external user, the user id assigned to you will identify the appropriate Group/subgroup necessary to create the available reports.

BEFORE YOU BEGIN

Login to the *eAdministration* HOMEScreen.

Opening the Report Portal



To access the web-based Report Portal, please follow these steps:

1. Follow the steps to open the *eAdministration* HOME screen. See Chapter 1: System Overview, Section 2: Getting Started, topic: Opening *eAdministration* for more detailed information.
2. The *eAdministration* HOME menu displays a list of applications and/or functions you have access to. For example:
 - Log out
 - Change Password
 - My Profile
 - e-Bill Services
 - Forms Library (if assigned to the userid)
 - Report Portal (if assigned to the userid)
3. Select the Report Portal link to open the REPORT PORTAL screen.
4. The REPORT PORTAL screen will display a listing of the report. The reports listed are limited by the products associated with your group.
5. Click on the green arrow to the left of the report name to open the report parameter screen.

Report Parameter

When you select a report from the Report Portal screen, a report parameter screen may


The screenshot shows a web interface for a report parameter screen. At the top left, there are links for "Return To Report List" and "Exit". The main area contains several input fields: "Group Name" (ABC COMPANY), "Subgroup" (1002 ABC COMPANY SUBGROUP T), "Incurred Start Date" (with a calendar icon and a checked "NULL" checkbox), and "Incurred End Date" (with a calendar icon and a checked "NULL" checkbox). A "View Report" button is located to the right of the Subgroup field. Below these fields is a navigation bar with "1 of 15" pages, a "100%" zoom level, and "Find | Next" options. The main content area is titled "Life Paid Claim Report" and "Detail of all selected accounts". It displays summary information: Group Number: 300000, Group Name: ABC COMPANY, Subgroup Number: 1002, Subgroup Name: ABC COMPANY SUBGROUP TWO, and Incurred Dates: -. Below this is a table with columns: Claim ID, Benefit, Incurred Date, Received Date, Paid Date, Benefit Amount, Interest Amount, Paid Amount, and Net Before T. The table header also includes Member Name, Relationship, and Date of Birth.

appear. The report parameter screen allows the user to enter criterion in order to limit the report content.

To filter a report from the REPORT PARAMETER screen, please follow these steps:

1. Open the Report Portal screen to view a listing of the available reports.
2. Click on the green arrow to the left of the report you want to create.
3. The GROUP NUMBER or NAME field will be pre-populated with the Group ID and Name associated with your user ID.
4. The SUBGROUP ID and NAME field will contain a drop-down list and will be pre-populated with the subgroups associated with your user id.
5. Some fields may default to Null, which means that all available information based on these fields will display on the report.
6. To restrict the information displayed on the screen, de-select the Null checkbox by clicking on it. The checkmark will be removed and the textbox next to the de-selected checkbox will be opened for you to enter text.

Continued next page

Incurred Start Date:  NULL

Incurred End Date: NULL

August, 2007

S	M	T	W	T	F	S
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1

Group Number: 30
Subgroup Number: 10

Today is Wednesday, August 29, 2007


Life Paid Claim Report


Detail of all selected accounts

5. For date fields, click on the calendar icon to open the pop-up calendar and select a date.
6. Or, just click on the date field and type in a valid date in mm/dd/yyyy format.
7. Click on the open textbox field that is not a date field and type in valid information.
8. Or, if the field has a down arrow, click on the down arrow to open the drop-down menu list.
9. Click <View Report> to create the report based on the criteria entered or defaulted.
10. The report will display on the screen.

Group Name:

Subgroup:

Incurred Start Date:  NULL





Incurred End Date:  NULL

1 of 15 | 100% | Find | Next | Select a format | Export

Report Functions

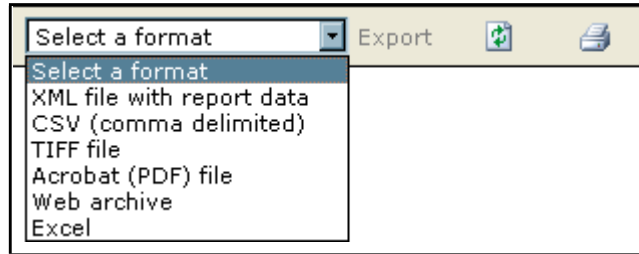
The report displayed on the screen can be viewed on the screen page by page, exported in a different format or printed.

To page through the report, please follow these steps:

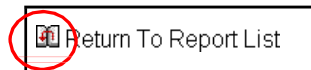
1. To page through the report click:
 - Click on the right arrow  to move to the next page
 - Click on the left arrow  to move to the previous page
 - Click on the right arrow with a bar after it  to jump to the last page
 - Click on the left arrow with a bar before it to jump  to the first page
2. Or, click on the page field and type a page number to jump of 15 to that page.
3. Click on the FIND | NEXT textbox field Find | Next to type in a specific word, and then click Find to search through the report for a specific item.
4. Click Next to search for the next instance of the item in the textbox.

Continued next page

- To export the report into a different format, click on the down arrow on the Export field to open the drop-down list.



- Click on a format then select Export.
- The report will be exported into the format selected and will open in a separate window.
- To print the report as displayed on the screen, click on the printer icon to send it to your local printer.
- To close the report and report parameter screen, click on the Return to Report List icon. The listing of available reports will appear.



- To close the report portal, click on the Exit link. You will return to the WELCOME screen.
- If you have not timed out of the web site, you may need to also select the Log out link on the WELCOME screen.
- When you select the Log-out link, or have timed out of the web site, the LOG IN screen displays.

CHAPTER 5: USER ADMINISTRATION

PURPOSE

This chapter provides detailed information regarding the User Administration functionality. You must be setup as the group or subgroup “Super User” to gain access to this functionality. You will be able to add and maintain the users for your organization.

This chapter will provide step- by-step instructions on the following functions:

- Add User
- Update User
- View User
- Reset Password
- Terminate User

Once you login to the *eAdministration* system, the USER ADMINISTRATION link will be displayed in the menu list on the HOME page.

BEFORE YOU BEGIN

You must have been given access to the User Administration system. And login to the *eAdministration* HOME screen.

Section 1: User Listing

User Administration								
User ID	User Type	First Name	Last Name	E-Mail	E-Bill Services	Forms Library	Report Portal	Active/Terminated
<input type="checkbox"/>	[REDACTED]	SUBGROUP BILLING	[REDACTED]	[REDACTED]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Active
<input type="checkbox"/>	[REDACTED]	SUBGROUP BILLING	[REDACTED]	[REDACTED]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Terminated (03/30/2017)
<input type="checkbox"/>	[REDACTED]	GROUP	[REDACTED]	[REDACTED]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Active
<input type="checkbox"/>	[REDACTED]	GROUP	[REDACTED]	[REDACTED]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Terminated (01/29/2018)

[View User](#) [Reset Password](#) [Update User](#) [Add User](#) [Terminate User](#)

Opening the User Maintenance System

To open the User Administration system, click on the USER ADMINISTRATION link. The User Listing screen displays all existing user assigned to your organization. You will be able to review the following information for each user:

- A checkbox to select an existing user
- User ID
- User Type
- First Name
- Last Name
- E-mail address
- System access to e-Bill Services, Forms Library or Report Portal
- Active or Terminated status

The following command buttons are available from this screen:

- View User (to review the existing information for a user)
- Reset Password
- Update User
- Add User
- Terminate User

PURPOSE

This section provides detailed information on adding a new user

BEFORE YOU BEGIN

Login to the *eAdministration* system and open the User Listing screen by clicking on the User Administration link.

Section 2: Add User

User Administration								
User ID	User Type	First Name	Last Name	E-Mail	E-Bill Services	Forms Library	Report Portal	Active/Terminated
<input type="checkbox"/>	[REDACTED]	SUBGROUP BILLING	[REDACTED]	[REDACTED]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Active
<input type="checkbox"/>	[REDACTED]	SUBGROUP BILLING	[REDACTED]	[REDACTED]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Terminated (03/30/2017)
<input type="checkbox"/>	[REDACTED]	GROUP	[REDACTED]	[REDACTED]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Active
<input type="checkbox"/>	[REDACTED]	GROUP	[REDACTED]	[REDACTED]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Terminated (01/29/2018)

Add User

Effective Date :

User ID :

First Name :

Last Name :

Email Address :

Opt-out e-mail notifications

2. User Access

User Type : (Hint: GROUP user type automatically has access to all active sub-groups)

Active Sub Groups : All active sub group(s).

Select All

Id	Name
<input type="checkbox"/>	1001 [REDACTED]

Applications

Application Name	Data
<input type="checkbox"/> e-Bill Services	
<input type="checkbox"/> Forms Library	
<input type="checkbox"/> Report Portal	
Report Name	
<input type="checkbox"/>	Evidence of Insurability Report Last 4 SSN (MLS-02_xe)
<input type="checkbox"/>	MCR-02A_e; Life Paid Claim Detail by Incurred Date
<input type="checkbox"/>	MCR-14_e; Life Insurance Waiver of Premium Report

Add User Screen

To add a new user, please follow these steps:

1. Click <Add User> on the USER LISTING screen to open the ADD USER screen.
2. The ADD USER screen displays these areas:
 - Identity
 - User Access

Add User

Effective Date : 11/03/2018

User ID :

First Name :

Last Name :

Email Address :

Opt-out e-mail notifications

Identity Section

To enter user identity information, please follow these steps:

1. Open the Add User screen.
2. To change the default effective date, click on the EFFECTIVE DATE field and type in a future date in mm/dd/yyyy format.
3. To keep the default effective date, click on the USER ID field
4. Type a valid user id into the USER ID field. User ids must be at least 8 characters in length. User ids cannot be modified so be sure they are correct before you select the Submit command button.

Recommended guidelines for user ids are:
The first letter of the user's first name and the last name.
If the first letter of the first name and last name are less than 8 characters, back fill the remaining characters with numeric characters.
For example: If user's name is Alice Blue, user id could be ablue123 or ablue2007.
If user's name is Alice Blueandgold, user id could be ablueandgold (user id can exceed 8 characters.)

5. Click on the FIRST NAME field and type in the user's actual first name.
6. Click on the LAST NAME field and type in the user's actual last name.
7. Click on the EMAIL ADDRESS field and type in the user's actual email address.

Important: The user's email address is required as the passwords are system generated and sent to the user via email.

2. User Access

User Type : GROUP (Hint: GROUP user type automatically has access to all active sub-groups)

Active Sub Groups : All active sub group(s).

Select All

Id	Name
<input type="checkbox"/>	1001

Applications

Application Name	Data
<input type="checkbox"/> e-Bill Services	
<input type="checkbox"/> Forms Library	
<input type="checkbox"/> Report Portal	

Report Name	
<input type="checkbox"/>	Evidence of Insurability Report Last 4 SSN (MLS-02_xe)
<input type="checkbox"/>	MCR-02A_e; Life Paid Claim Detail by Incurred Date
<input type="checkbox"/>	MCR-14_e; Life Insurance Waiver of Premium Report

User Access Section – User Type

To assign user access, please follow these steps:

1. Click on the down arrow of the USER TYPE field to open the drop-down menu list.
2. Select one of the following options:
 - Group – to allow user access to all data within your organization as well as all available eBill Services system functionality.
 - Subgroup – to limit access to subgroup(s) data only with all available eBill Services functionality.
 - Subgroup Billing – to limit access to only subgroup(s) data and eBill Services billing functionality for List Billed subgroups. This user type will not be able to access Self Billed subgroups in the eBill Services system.
 - Subgroup Enrollment – to limit access to only subgroup(s) data and eBill Services enrollment functionality for List Billed groups. This user type will not be able to access Self Billed subgroups in the eBill Service system.
3. All user types will be eligible for Forms Library and Report Portal access.

Continued next page

2. User Access

User Type : (Hint: GROUP user type automatically has access to all active sub-groups)

Active Sub Groups: All active sub group(s).

Select All

Id	Name
<input type="checkbox"/> 1001	

Applications

Application Name	Data
<input type="checkbox"/> e-Bill Services	
<input type="checkbox"/> Forms Library	
<input type="checkbox"/> Report Portal	

Report Name
<input type="checkbox"/> Evidence of Insurability Report Last 4 SSN (MLS-02_xe)
<input type="checkbox"/> MCR-02A_e: Life Paid Claim Detail by Incurred Date
<input type="checkbox"/> MCR-14_e: Life Insurance Waiver of Premium Report

User Access Section – Active Subgroups

If a subgroup user type is selected, please follow these steps:

1. Click on at least one of the checkboxes to the left of the subgroup ID and Name to select the subgroup. You are able to assign more than one subgroup to a user.
2. A checkmark will appear, and the user will only have access to the selected subgroup(s).
3. To select all subgroup, click on the SELECT ALL checkbox.

Important: If the GROUP user type is selected, all subgroups are automatically selected and will be available to the new user.

Continued next page

User Access Section – Applications

To assign specific applications to a user, please follow these steps:

1. Click on the checkbox next to the application to select it.
2. If you select the E-BILL SERVICES application checkbox, the user will have access to the on-line billing system.

If you selected User Type:	Then user will have eBill Services access for:
Group	All e-Bill functionality for all subgroups within your organization.
Subgroup	All e-Bill functionality for only subgroup(s) specified.
Subgroup Billing	Only billing functionality for the Self Billed subgroup(s) specified. Not applicable to List Billed
Subgroup Enrollment	Only enrollment functionality for the List Billed subgroup(s) specified. Not applicable to List Billed subgroups.

3. If you select the FORMS LIBRARY application checkbox, the user will have access to the online forms. The user will be able to view and print any necessary forms and the Administration Manual.
4. If you select the REPORT PORTAL application checkbox, the user will have access to the online reports. And the report selection checkboxes will become enabled.
5. If you selected the REPORT PORTAL application checkbox, you must select at least one report. A Group user type will have access to all the data for all the subgroups within your organization. Any of the Subgroup user types will be limited to data for only the specified subgroup(s).

Applications

Application Name	Data
<input type="checkbox"/> e-Bill Services	
<input type="checkbox"/> Forms Library	
<input checked="" type="checkbox"/> Report Portal	<p>Report Name</p> <input type="checkbox"/> Incurred Claim Exp Report for Life LTD <input type="checkbox"/> Life Paid Claim External <input type="checkbox"/> Life Pended Claim External <input type="checkbox"/> Waiver Report External

Complete the Add User process

To complete the Add User process, please follow these steps:

1. Review all the information entered for this user. Verify the USER ID and USER TYPE is correct as these fields cannot be modified later.
2. Click on the Submit command button to save the user information entered.
3. Click on the Cancel command button to close the ADD USER screen and return to the USER LISTING screen without saving the user information entered.
4. When the user has been created successfully, you will receive the following confirmation message:

Add User complete

The user has been created successfully.
 An e-mail has been sent to the user with his password.
 Please send a separate e-mail to the user with his/her user id.

5. Click on the Continue command button to close the confirmation message and return to the USER LISTING screen.
6. The system generates a random alpha-numeric temporary password and sends it to the user via email.
7. You must notify the user in a separate email of his/her user id.

Note: When the user logs into *eAdministration* using the temporary password, he or she will be prompted to change the password, select a security question and provide a security answer. The security information is used to validate the user when they forget their password.

Section 3: Update User

PURPOSE

This chapter provides detailed information regarding the Update User process. You will be able to modify the following information for an existing user:

- First and Last Name
- Email address
- Access to active subgroup
- Access to the applications; eBill Services, Forms Library, Report Portal

BEFORE YOU BEGIN

Login to the *eAdministration* system and open the USER LISTING screen.

User Administration									
User ID	User Type	First Name	Last Name	E-Mail	E-Bill Services	Forms Library	Report Portal	Active/Terminated	
<input type="checkbox"/>	[REDACTED]	SUBGROUP BILLING	[REDACTED]	[REDACTED]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Active	
<input type="checkbox"/>	[REDACTED]	SUBGROUP BILLING	[REDACTED]	[REDACTED]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Terminated (03/30/2017)	
<input type="checkbox"/>	[REDACTED]	GROUP	[REDACTED]	[REDACTED]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Active	
<input type="checkbox"/>	[REDACTED]	GROUP	[REDACTED]	[REDACTED]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Terminated (01/29/2018)	

[View User](#)
[Reset Password](#)
[Update User](#)
[Add User](#)
[Terminate User](#)

Update User

To update an existing user, please follow these steps:

1. Click on the USER ADMINISTRATION link at the *eAdministration* HOME screen to open the USER LISTING screen.
2. Click on the checkbox to the left of the user id to select an existing user. A checkmark will appear in the checkbox.
3. Click on the Update User command button to open the UPDATE USER screen.
4. The following fields are disabled and display the information entered when the user was set up:
 - Effective Date
 - User ID
 - User Type

Continued next page

1. Identity

Effective Date : 03/03/2016

User ID : ██████████

First Name : ██████████

Last Name : ██████████

Email Address : ██████████@mlaw.com

Opt-out e-mail notifications

2. User Access

User Type : SUBGROUP BILLING

Active Sub Groups : No active sub-groups assigned to this user.

Id	Name
<input type="checkbox"/>	1001

Applications

Application Name	Data
<input checked="" type="checkbox"/> e-Bill Services	
<input type="checkbox"/> Forms Library	
<input type="checkbox"/> Report Portal	
Report Name	
Evidence of Insurability	
<input type="checkbox"/> Report Last 4 SSN (MLS-02_*)	
MCR-02A_w) Life Paid Claim	
<input type="checkbox"/> Detail by Incurred Date	
MCR-14_a) Life Insurance	
<input type="checkbox"/> Waiver of Premium Report	
MCR-15_a) Life Pending	
<input type="checkbox"/> Claim	

[Close](#)

5. Click on any of these identity fields to modify the information entered:
 - First Name
 - Last Name
 - Email Address
6. Click on the checked checkbox for an active subgroup or application to remove it. The user will no longer have access to the data for the subgroup or application.
7. Click on the unchecked checkbox for an active subgroup or application to add a checkmark. The user will now have access to that subgroup or application.
8. Click on the SELECT ALL checkbox to check all the subgroups. The user will have access to the data for all the subgroups within your group or organization.
9. Unchecking the REPORT PORTAL application checkbox will remove access to the previously selected reports.
10. Click on an unchecked report to add a checkmark. The user will have access to that report.
11. Click on a checked report to remove the checkmark. The user will no longer have access to that report.

Complete the Update User process

To complete the Update User process, please follow these steps:

1. Review all the modifications for this user.
2. Click <Submit > to save the modified user information and close the UPDATE USER screen. The USER LISTING screen opens.
3. Click <Cancel > to close the UPDATE USER screen and return to the USER LISTING screen without saving the user information entered.

Important: If the EFFECTIVE DATE, USER ID or USER TYPE needs to be changed, you must terminate the old user id and create a new one. See **Section 6: Terminate User** for more detailed information.

Section 4: Miscellaneous Functions

PURPOSE

This section provides detailed information regarding the remaining functions of the User Administration application.

You will be able to:

- View the current information for an existing user
- Reset an existing user's password
- Terminate an existing user

BEFORE YOU BEGIN

Login to the *eAdministration* system and open the USER LISTING screen.

User Administration									
User ID	User Type	First Name	Last Name	E-Mail	E-Bill Services	Forms Library	Report Portal	Active/Terminated	
<input type="checkbox"/>	[REDACTED]	SUBGROUP BILLING	[REDACTED]	[REDACTED]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Active	
<input type="checkbox"/>	[REDACTED]	SUBGROUP BILLING	[REDACTED]	[REDACTED]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Terminated (03/30/2017)	
<input type="checkbox"/>	[REDACTED]	GROUP	[REDACTED]	[REDACTED]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Active	
<input type="checkbox"/>	[REDACTED]	GROUP	[REDACTED]	[REDACTED]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Terminated (01/29/2018)	

View User Reset Password Update User Add User Terminate User

View User

If you need to verify the current information for a user, you are able to view this information without going through the UPDATE USER process.

To review information on an existing user, please follow these steps:

1. Click on the USER ADMINISTRATION link at the *eAdministration* HOME screen to open the USER LISTING screen.
2. Click on the checkbox to the left of the user id to select an existing user. A checkmark will appear in the checkbox.
3. Click <View User> to open the VIEW USER screen.

Continued next page

1. Identity

Effective Date : 03/03/2016

User ID : [REDACTED]

First Name : [REDACTED]

Last Name : [REDACTED]

Email Address : [REDACTED]mlaw.com

Opt-out e-mail notifications

2. User Access

User Type : SUBGROUP BILLING

Active Sub Groups : No active sub-groups assigned to this user.

Id	Name
<input type="checkbox"/>	1001 [REDACTED]

Applications

Application Name	Data
<input checked="" type="checkbox"/> e-Bill Services	
<input type="checkbox"/> Forms Library	
<input type="checkbox"/> Report Portal	
Report Name	
<input type="checkbox"/>	Evidence of Insurability
<input type="checkbox"/>	Report Last 4 SSN (MLS-02_xe)
<input type="checkbox"/>	MCR-02A_e; Life Paid Claim Detail by Incurred Date
<input type="checkbox"/>	MCR-14_e; Life Insurance Waiver of Premium Report
<input type="checkbox"/>	MCR-15_e; Life Pended Claim

Close

4. All the fields on this screen are disabled and display the current information for the user selected on the USER LISTINGS screen.
5. Click <Close > to close the VIEW USER screen and return to the USER LISTING screen.

Reset Password

If the user is locked out of the login process, it may be necessary for you to assist them in resetting their password.

To reset a password for an existing user, please follow these steps:

1. Click on the USER ADMINISTRATION link at the *eAdministration* HOME screen to open the USER LISTING screen.
2. Click on the checkbox to the left of the user id to select an existing user. A checkmark will appear in the checkbox.
3. Click <Reset Password> and the system will generate a new password for the user.
4. The following confirmation message will display:

Reset Password complete

The user password has been reset and an e-mail has been sent to the e-mail address on file.

[Continue](#)

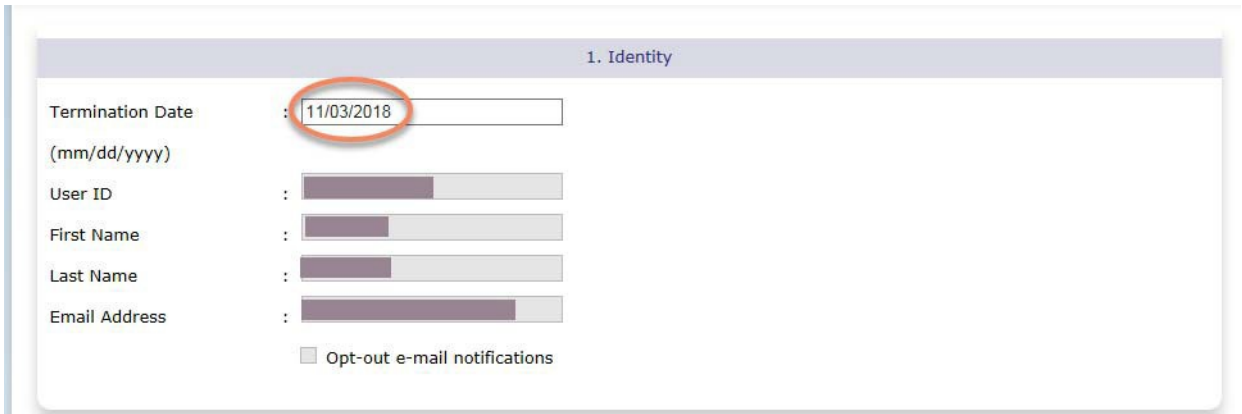
5. The user will receive an email with the system-generated temporary password.
 6. Click <Continue > to close the confirmation message and return to the USER LISTING screen.
-

Terminate User

It may be necessary to terminate users that are no longer with your organization or if the EFFECTIVE DATE, USER ID or USER TYPE for an existing user needs to be corrected.

To terminate an existing user, please follow these steps:

1. Click on the USER ADMINISTRATION link at the *eAdministration* HOME screen to open the USER LISTING screen.
2. Click on the checkbox to the left of the user id to select an existing user. A checkmark will appear in the checkbox.
3. Click <Terminate User> to open the TERMINATE USER screen.



1. Identity

Termination Date : 11/03/2018
(mm/dd/yyyy)

User ID : [disabled]

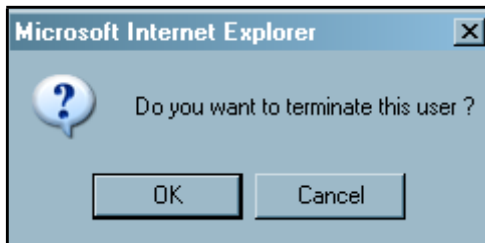
First Name : [disabled]

Last Name : [disabled]

Email Address : [disabled]

Opt-out e-mail notifications

4. The TERMINATE USER screen opens with only the TERMINATION DATE field enabled. The other fields are disabled and display current user information.
5. Click on the TERMINATION DATE field to enter a valid date in mm/dd/yyyy format.
6. If the default date is correct, you do not need to enter a new date.
7. Click <Cancel > to return to the USER LISTING screen without terminating the user.
8. Click <Submit > to save the termination date.
9. The following confirmation message will display in a separate window:



10. Click <Ok > to terminate the user and return to the USER LISTING screen.
11. Click <Cancel to close the confirmation message and return to the TERMINATE USER Screen.