eAdministration User Guide

Self Billing

New York

Table of Contents

CHAPTER 1: E-BILL SERVICES SYSTEM

PURPOSE

This chapter provides detailed information on opening and closing the online-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

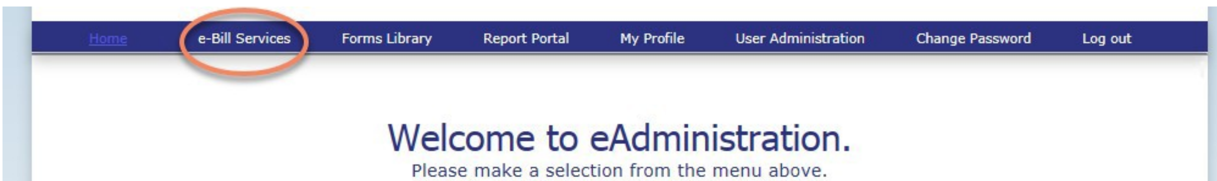
Log on to the *eAdministration* HOME screen.

E-BILL SERVICES SYSTEM

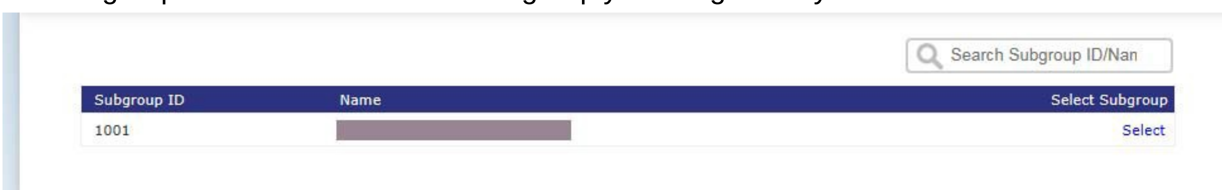
Open e-Bill Services

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.



4. 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.

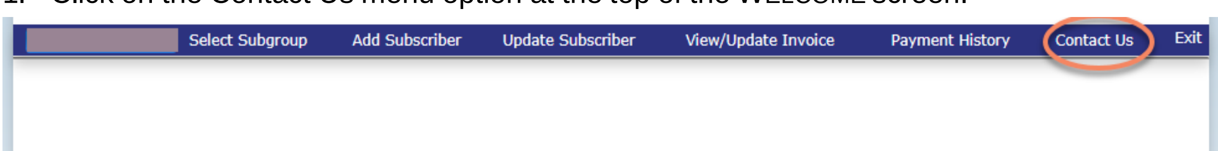


5. Click on the appropriate <u>SUBGROUP ID</u> or <u>NAME</u> link to open the e-Bill Services WELCOME screen. See below for an example of the Welcome screen.

Contact Us

To view contact information, please follow these steps:

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

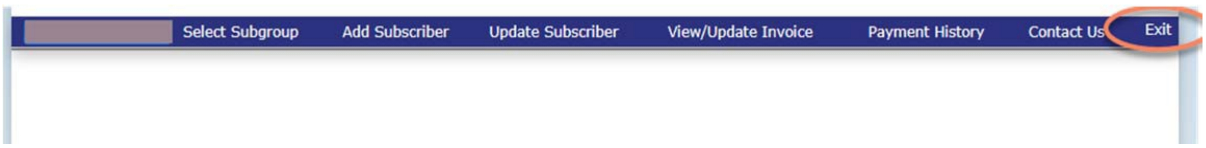


2. The Contact Us screen opens and displays the following information:
   - Help Desk
   - Premium Mailing Address
   - Billing Department

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: SELF-BILL E-BILL PROCESSING

PURPOSE

This chapter provides detailed information regarding our online billing for Self 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: Update Invoice

PURPOSE

This section provides detailed information about updating a Self Bill invoice.

You will receive an e-mail from us 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 access the invoice on the e- Bill system.

If you do not receive an invoice by 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.

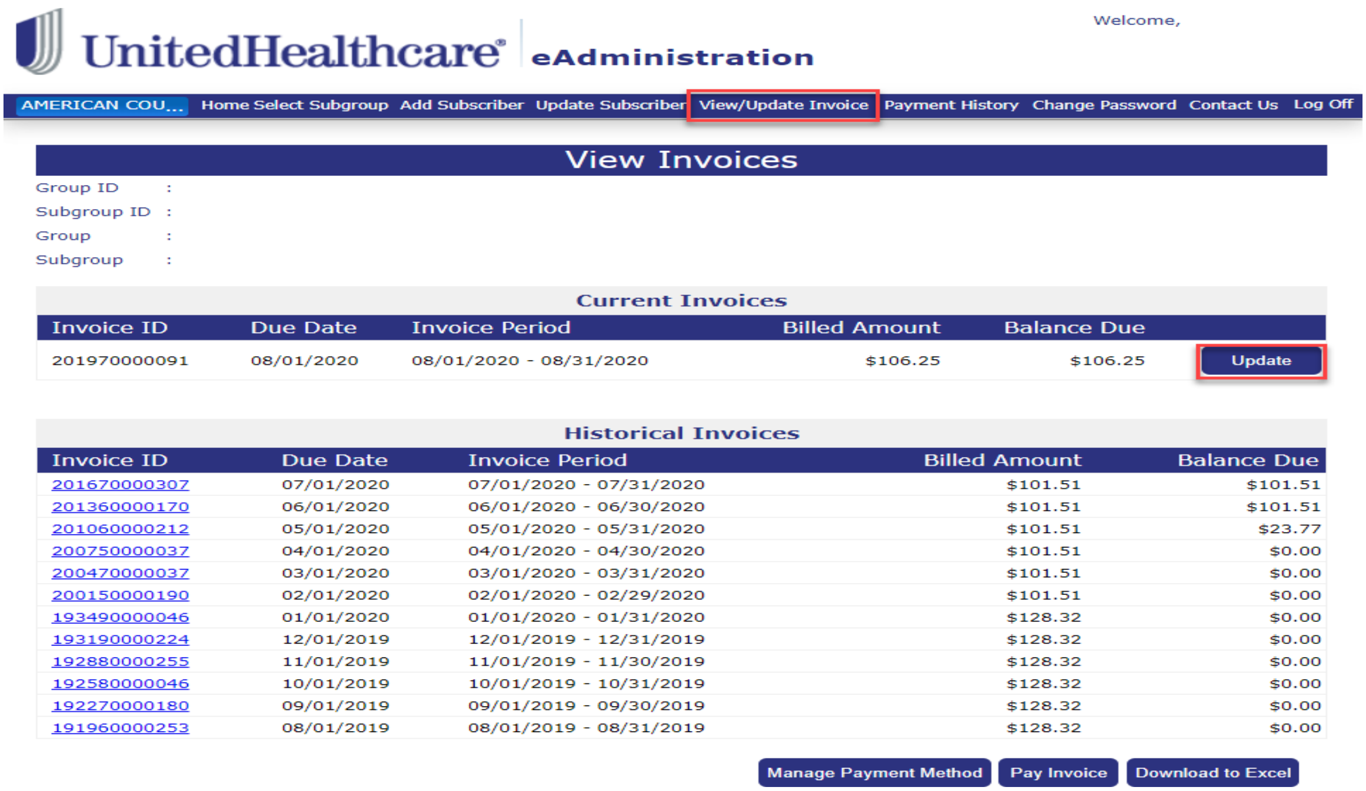
BEFORE YOU BEGIN

Login to the e-Bill Services system.

Search for Subgroups

To open the WELCOME TO BILLING screen, please follow these steps:

1. When you have successfully logged into the e-Bill Services system the Search for Subgroups screen opens.
2. Click on the Subgroup ID or Subgroup Name to open the WELCOME TO BILLING screen.



Update Invoice

1. Click View/Update Invoice menu option to open the VIEW INVOICES screen.
2. The VIEW INVOICES screen shows both current (unapproved) and historical (approved) invoices.

3. Click the Update button to view and update the oldest unapproved/current invoice. The oldest invoice that has not been processed must be updated and approved before you can view and update the current month.

> **Important:** Any changes made to the oldest current invoice will not be reflected in the next month's invoice if invoices have already been created.
>
> Any new invoices that are created by the system will use the data of the last approved invoice as a reference.
>
> The oldest unapproved invoice is the only invoice that will have the **Update** option.

[redacted] .. Select Subgroup | View/Update Invoice | Payment History | Change Password | Contact Us | Log Off

Update Invoice Detail

Click here to see update invoice instructions

Invoice Summary

[redacted]

Invoice# : 183050000000
Invoice Date : 11/01/2018
Coverage Period : 11/01/2018 - 11/30/2018
Group ID : 305144
Subgroup ID : 1002
Due On : November 01, 2018

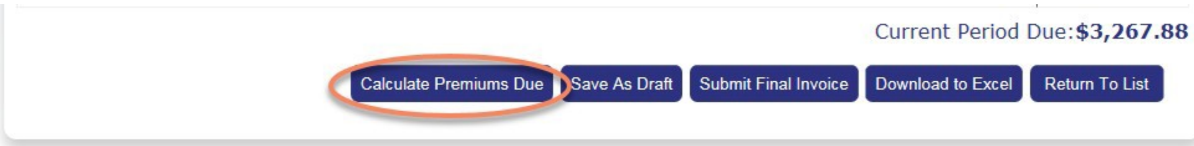
Total Billed Amount : $3,267.88
Total Retro Amount : $0.00
Total Premium Due : $3,267.88

Reconciled Invoices

Plan Description	Prior Period Count	Current Period Count	Prior Period Volume	Current Period Volume	Rate	Prior Period Total Due	Current Period Total Due	Override Requested	Enter Retro Adjustment (premium only) + or -
Basic Life	45	45	$4,958,900	4,958,900	$0.150000	$743.84	743.84	☐	0.00
Basic AD&D	45	45	$4,858,700	4,858,700	$0.020000	$97.17	97.17	☐	0.00
Supplemental Life 0-24	0	0	$0	0	$0.090000	$0.00	0.00	☐	0.00
Supplemental Life 25-29	0	0	$0	0	$0.090000	$0.00	0.00	☐	0.00
Supplemental Life 30-34	0	0	$0	0	$0.100000	$0.00	0.00	☐	0.00
Supplemental Life 35-39	3	3	$300,000	300,000	$0.110000	$33.00	33.00	☐	0.00
Supplemental Life 40-44	3	3	$240,000	240,000	$0.160000	$38.40	38.40	☐	0.00
Supplemental Life 45-49	2	2	$20,000	20,000	$0.270000	$5.40	5.40	☐	0.00
Supplemental Life 50-54	2	2	$600,000	600,000	$0.450000	$270.00	270.00	☐	0.00
Supplemental Life 55-59	2	2	$170,000	170,000	$0.740000	$125.80	125.80	☐	0.00
Supplemental Life 60-64	1	1	$100,000	100,000	$0.810000	$81.00	81.00	☐	0.00
Supplemental Life 65-69	1	1	$65,000	65,000	$1.260000	$81.90	81.90	☐	0.00
Supplemental Life 70-74	0	0	$0	0	$2.040000	$0.00	0.00	☐	0.00
Supplemental Life 75+	0	0	$0	0	$4.510000	$0.00	0.00	☐	0.00
Supplemental AD&D - EE	14	14	$1,495,000	1,495,000	$0.020000	$29.90	29.90	☐	0.00

4. The Update Invoice Detail screen opens. Amounts in the Prior information columns are populated from the last approved invoice.
5. Click on the CURRENT PERIOD COUNT field for each plan description and type in the correct count amount, if necessary.
6. Click on the CURRENT PERIOD VOLUME field for each plan description and type in the correct volume (or benefit) amount, if necessary.

7. Click <Calculate Premiums Due>at the bottom of the screen and the system will calculate the CURRENT PERIOD TOTAL DUE amount for each plan description and the CURRENT PERIOD DUE amount at the bottom of the screen.



8. Click on the checkbox under the OVERRIDE REQUEST column for the Plan Description <u>only</u> if one of the following circumstances applies:

Reconciled Invoices

Plan Description	Prior Period Count	Current Period Count	Prior Period Volume	Current Period Volume	Rate	Prior Period Total Due	Current Period Total Due	Override Requested	Enter Retro Adjustment (premium only) + or -
Basic Life	45	45	$4,958,900	4,958,900	$0.150000	$743.84	743.84	☐	0.00
Basic AD&D	45	45	$4,858,700	4,858,700	$0.020000	$97.17	97.17	☐	0.00

Rounding issues –

The Current Period Due amount calculated incorrectly due to rounding issues.

The Current Period Total Due amounts for each plan row are rounded up or down for each plan.

The Current Period Due amount displayed at the bottom is calculated by adding the plan rows first, and then rounding the total up or down. This may result in the Current Period Due being off by $0.01.

To calculate the correct Current Period Due amount, check the Override Request checkbox and click <Calculate Premium Due> again.

The system will add the plan rows together as displayed and the Current Period Due amount will be correct.

If the Override request checkbox is not selected, the system will calculate the Current Period Due amount as before and the incorrect Current Period Due amount may be saved or submitted.

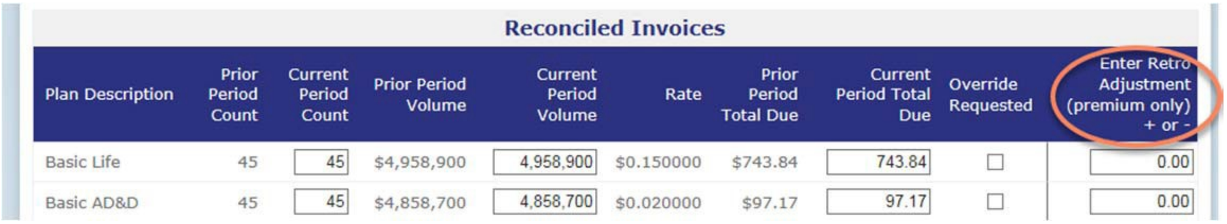
Age banded groups –

The group/subgroup has age banded products that are collapsed into one product category. Total all Current Period Counts, Current Period Volumes and Current Period Total Due amounts and enter them in the appropriate current period column.

Click on the OVERRIDE REQUEST checkbox and click on <Calculate Premium Due>.

The system will calculate the Current Period Due amount correctly.

Important: In this situation, the rates in our system should not be used to calculate the premium due; the check box should be left selected. It is **very important** that you do not unselect this check box.



Reconciled Invoices

Plan Description	Prior Period Count	Current Period Count	Prior Period Volume	Current Period Volume	Rate	Prior Period Total Due	Current Period Total Due	Override Requested	Enter Retro Adjustment (premium only) + or -
Basic Life	45	45	$4,958,900	4,958,900	$0.150000	$743.84	743.84	☐	0.00
Basic AD&D	45	45	$4,858,700	4,858,700	$0.020000	$97.17	97.17	☐	0.00

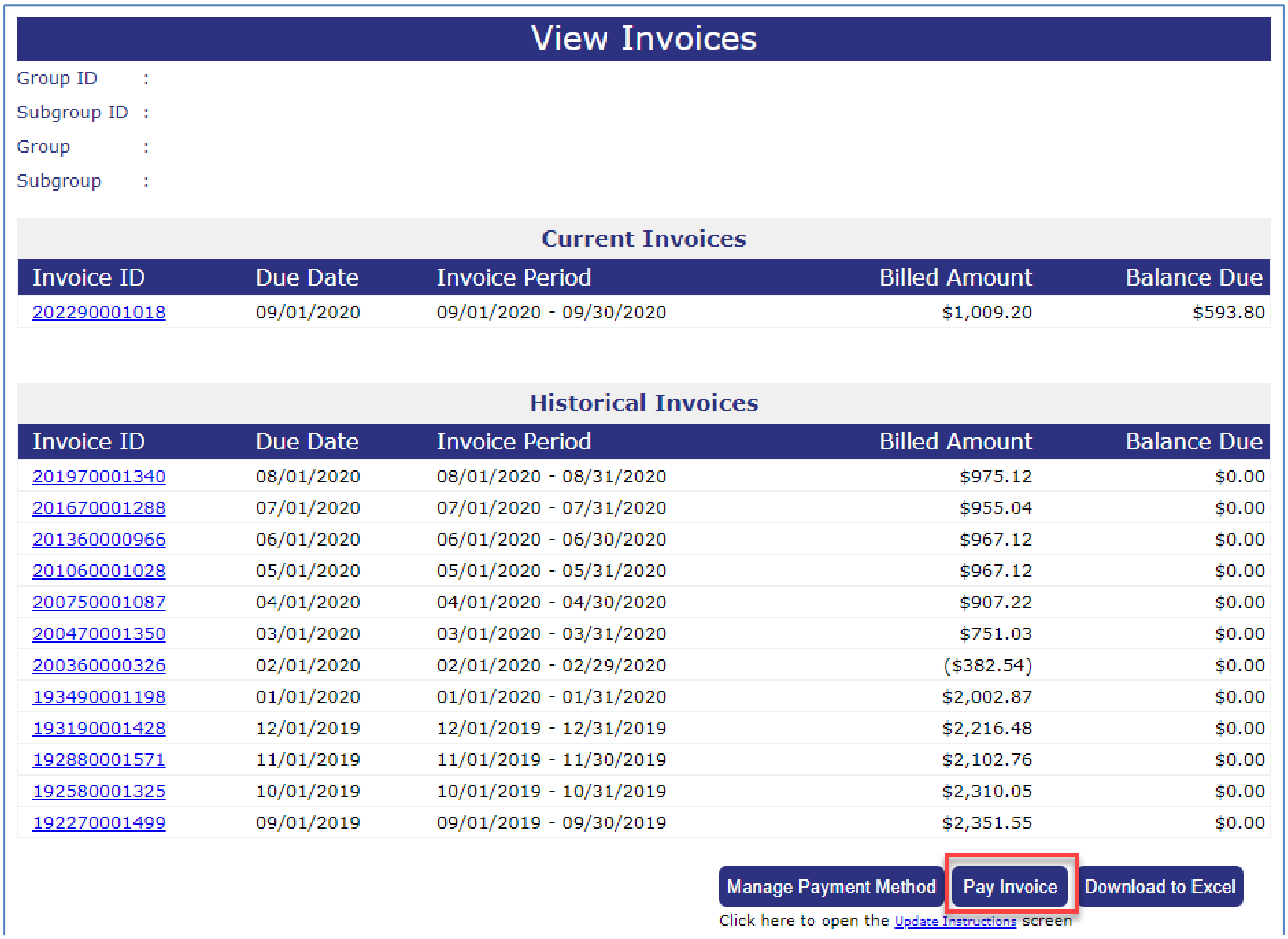
9. Enter any retroactive prior premium adjustment amounts for any plan description row in the ENTER RETRO ADJUSTMENT column. The retroactive adjustment is made only to the prior period(s).
10. Complete the update by clicking on one of the following buttons at the bottom of the screen:

- **Save As Draft:** To save the update and finish at a later date. The invoice will still be available for updates, and will remain under the CURRENT INVOICE section of the View Invoice screen. The invoice will <u>not</u> be approved for payment.
- **Submit Final Invoice:** To submit the invoice for payment. The invoice will no longer be available for updates, and will be listed under the HISTORICAL INVOICE section of the VIEW INVOICE screen. The invoice will be approved for payment.

11. Click <Download to Excel > to download the screen data to a Microsoft Excel spreadsheet. You will be able to save the invoice for your records or print it.
12. Click <Return to List> to return to the VIEW INVOICES screen.

Section 2: View Historical Invoices

This section provides detailed information regarding historical invoices. These invoices have been updated and approved for payment, and can no longer be updated. They can be either paid or unpaid invoices.



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

View Invoices

To view the invoice detail for an historical invoice, please follow these steps:

1. Click on the View/Update Invoice option.
2. The View Invoice screen will appear and display a listing of current and historical invoices.
3. Historical invoices are defined as approved invoices and cannot be updated. However, you are able to review the details of approved invoices.
4. Click on a HISTORICAL invoice ID to open the Invoice Detail screen. You will be able to view the invoice summary information for the selected invoice ID.

Reconciled Invoices

Plan Description	Current Period Count	Current Period Volume	Rate	Current Period Total Due	Retro
Basic Life	45	$4,858,700	$0.1500	$728.80	$27.00
Basic AD&D	45	$4,858,700	$0.0200	$99.23	$0.00
Supplemental Life 35-39	3	$300,000	$0.1100	$33.00	$0.00
Supplemental Life 40-44	3	$240,000	$0.1600	$38.40	$0.00
Supplemental Life 45-49	2	$20,000	$0.2700	$5.40	$0.00
Supplemental Life 50-54	2	$600,000	$0.4500	$270.00	$0.00
Supplemental Life 55-59	2	$170,000	$0.7400	$125.80	$0.00
Supplemental Life 60-64	1	$100,000	$0.8100	$81.00	$0.00
Supplemental Life 65-69	1	$65,000	$1.2600	$81.90	$0.00
Supplemental AD&D - EE	14	$1,495,000	$0.0200	$29.90	$0.00
Supplemental Dependent Life 35-39	1	$25,000	$0.1100	$2.75	$0.00
Supplemental Dependent Life 40-44	3	$95,000	$0.1600	$15.20	$0.00
Supplemental Dependent Life 45-49	1	$5,000	$0.2700	$1.35	$0.00
Supplemental Dependent Life 50-54	2	$50,000	$0.4500	$22.50	$0.00
Supplemental Dependent Life 60-64	1	$50,000	$0.8100	$40.50	$0.00
Supplemental Dependent Life 65-69	1	$32,500	$1.2600	$40.95	$0.00
Supplemental Dependent AD&D - Spouse	9	$257,500	$0.0200	$5.15	$0.00
Supplemental Dependent Life - Child	3	$30,000	$0.1200	$3.60	$0.00
Supplemental Dependent AD&D - Children	30	$30,000	$0.0200	$0.60	$0.00
Short Term Disability	42	$44,826	$0.1500	$672.39	$0.00
Long Term Disability	42	$318,826	$0.3000	$956.48	$0.00

Make Payment | Download to Excel | Return to List

<u>Invoice Detail</u>

The Invoice Detail screen opens to display detailed information for the historical invoice selected. You will be able to print the screen or download the invoice details to a Microsoft Excel workbook.

- To print the screen click on the Microsoft Internet Explorer print icon to send it to the printer.
- Or, select the File, Print menu option to open the print dialog box.
- To export the screen information to a Microsoft Excel workbook, click <Download to Excel >. You may then reformat the columns, manipulate the data and/or save the spreadsheet to a specified file location. For a hard copy of the invoice details, print the spreadsheet.
- To close the INVOICE DETAIL screen and return to the VIEW INVOICE screen, click <Return to List>.

Section 3: Pay Invoice

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

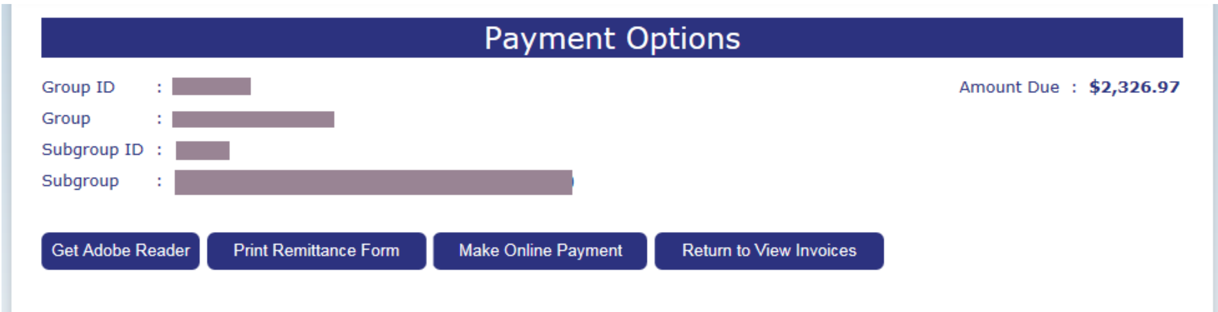
Payment Options

The Pay Invoice button is at the bottom of the VIEW INVOICE screen. After you have updated your invoice and submitted the invoice as final, you will notice that the invoice you have updated and approved appears at the top of the Historical Invoices list.

To pay your invoice, 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> to open the PAYMENT OPTIONS screen.
3. The PAYMENT OPTIONS screen and displays the group/subgroup ID and name and premium Amount Due dollar amount.
4. Click on one of the following payment options:
    - Print Remittance Form to pay by check.
    - Make Online Payment to pay online, using e-Bill's secured screens.
    - **Scheduled Direct Debit ACH** to schedule monthly payments based upon **"*Payment Date*"** selection during the setup process, on either the 10th or the 25th calendar day of the month.

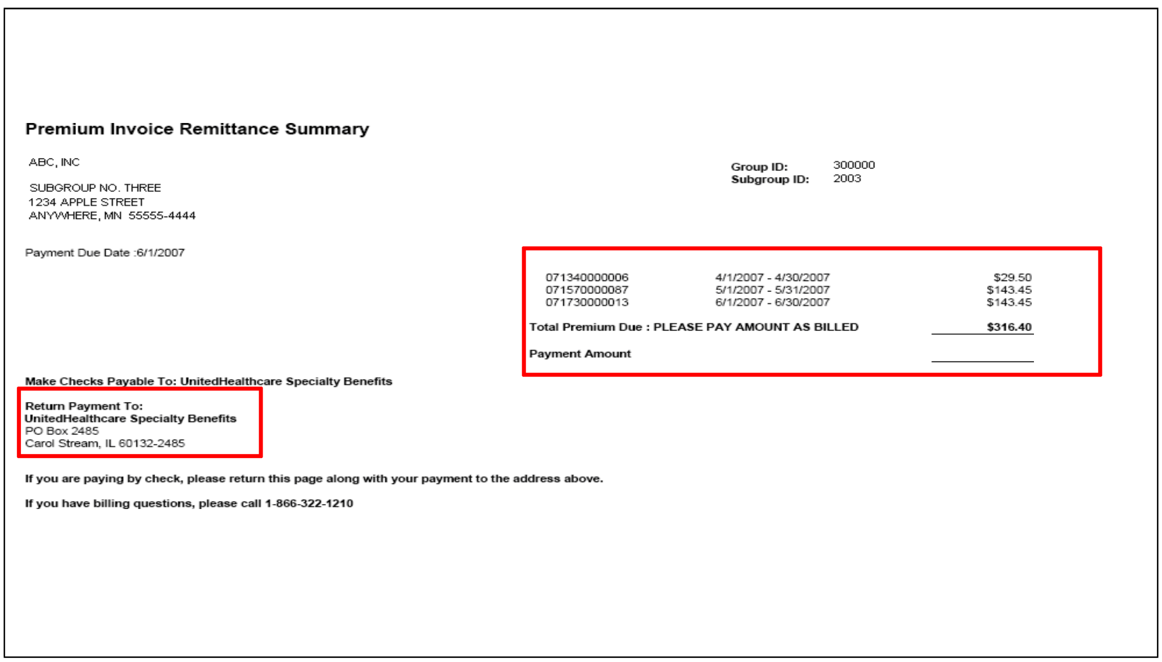
Important: The invoice must be submitted as final before payment can be posted.



Pay by check

To pay with a check, please follow these steps:

1. Click <Pay Invoice> on the UPDATE INVOICE screen to open the PAYMENT OPTIONS screen.
2. Click <Print Remittance Form>.
3. The Premium Invoice Remittance Summary appears as a Portable Document Format (PDF).



Premium Invoice Remittance Summary

ABC, INC

SUBGROUP NO. THREE
1234 APPLE STREET
ANYWHERE, MN 55555-4444

Group ID: 300000
Subgroup ID: 2003

Payment Due Date :6/1/2007

071340000006	4/1/2007 - 4/30/2007	$29.50
071570000087	5/1/2007 - 5/31/2007	$143.45
071730000013	6/1/2007 - 6/30/2007	$143.45
Total Premium Due : PLEASE PAY AMOUNT AS BILLED		**$316.40**
Payment Amount		

Make Checks Payable To: UnitedHealthcare Specialty Benefits

Return Payment To:
UnitedHealthcare Specialty Benefits
PO Box 2485
Carol Stream, IL 60132-2485

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

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

Continued on next page…

4. The remittance summary will display all the invoices that are currently approved and unpaid in the following format:
    - Invoice Number
    - Coverage Period
    - Invoice Amount Due
    - Total Premium Due
5. Print the remittance summary in landscape and be sure to enclose it with your payment.
6. To print the Remittance Summary, click on the printer icon at the top of the Adobe Acrobat Reader toolbar.
7. Make checks payable to Unimerica Life Insurance Company of New York and 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

9. To close the Adobe Acrobat Reader window click on the “X” at the top right-hand side of the toolbar.
10. Or, select the FILE option at the top of the screen, then select the CLOSE menu option.

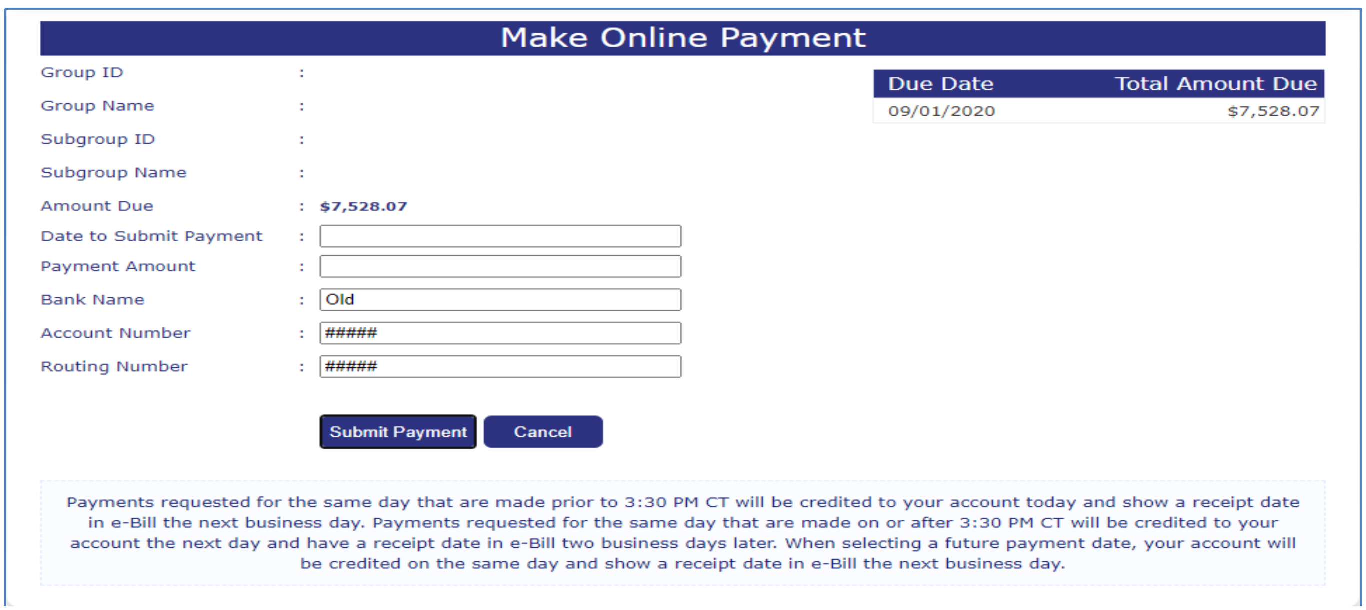
> **Important Note:** To avoid delays in posting your payment to your account, do not mail your payment to our street address. All address information is also contained in the **CONTACT US** screen.

Make On-line Payment

To pay online, please follow these steps:

1. Click <Pay Invoice> on the UPDATE INVOICE screen to open the PAYMENT OPTIONS screen.
2. Click <Make Online Payment> to open the secured online payment screen.

> **Important Note:** To make an electronic payment, the Electronic Payment Authorization Form must be completed, signed and mailed to the billing department.
> See **Chapter 5: Forms Library System, Topic: Electronic Payment Authorization Form** for instructions on obtaining a copy of the form. 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



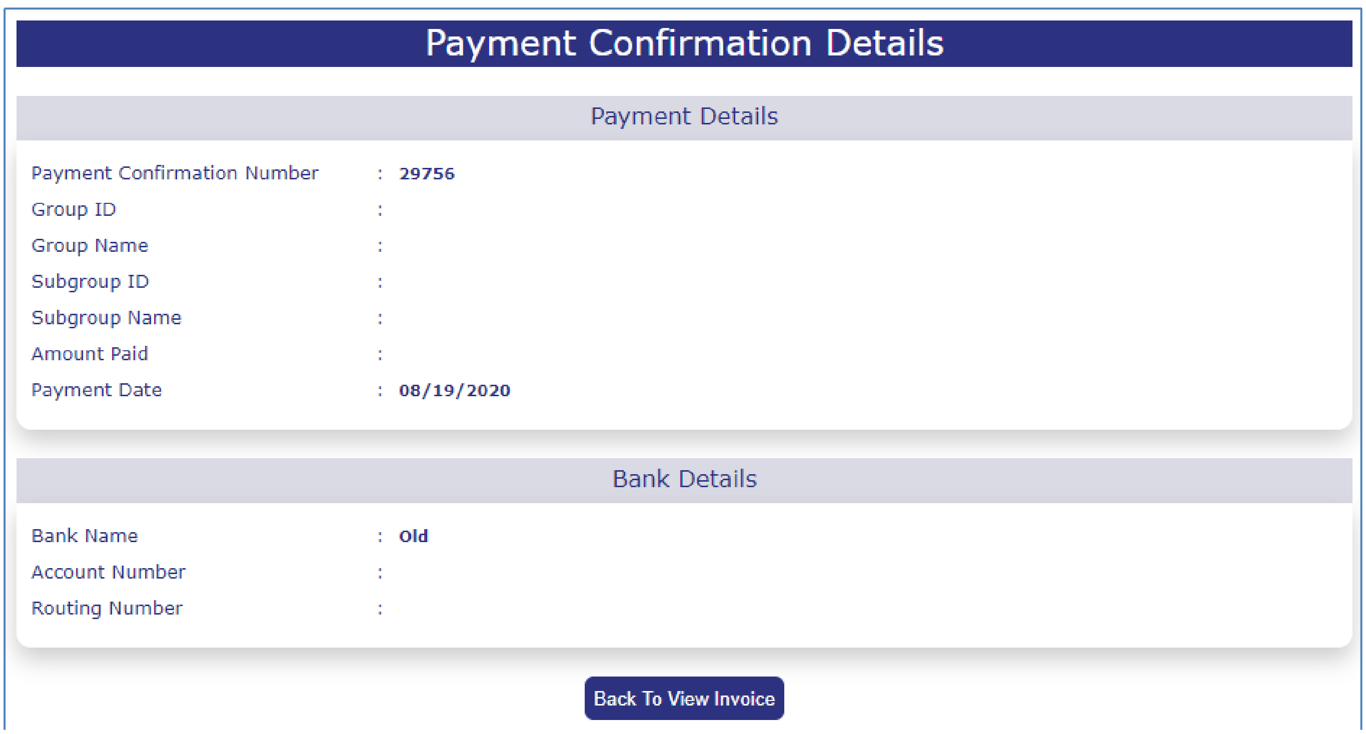
3. The BANK NAME, ACCOUNT NUMBER and ROUTING NUMBER fields are populated with your bank information when you have set up this option with our Billing Department. You will <u>not</u> be able to enter this information on-line.
4. If the bank information has not been previously set up with the billing department, 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 the Billing Department. You will not be able to continue with the on-line payment process.

Continued on next page

5. Verify the amount due matches the outstanding amount due for all your on-line invoices. If there is a discrepancy, contact our billing department.
6. Click on the PAYMENT AMOUNT field and type in the correct 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 Department.

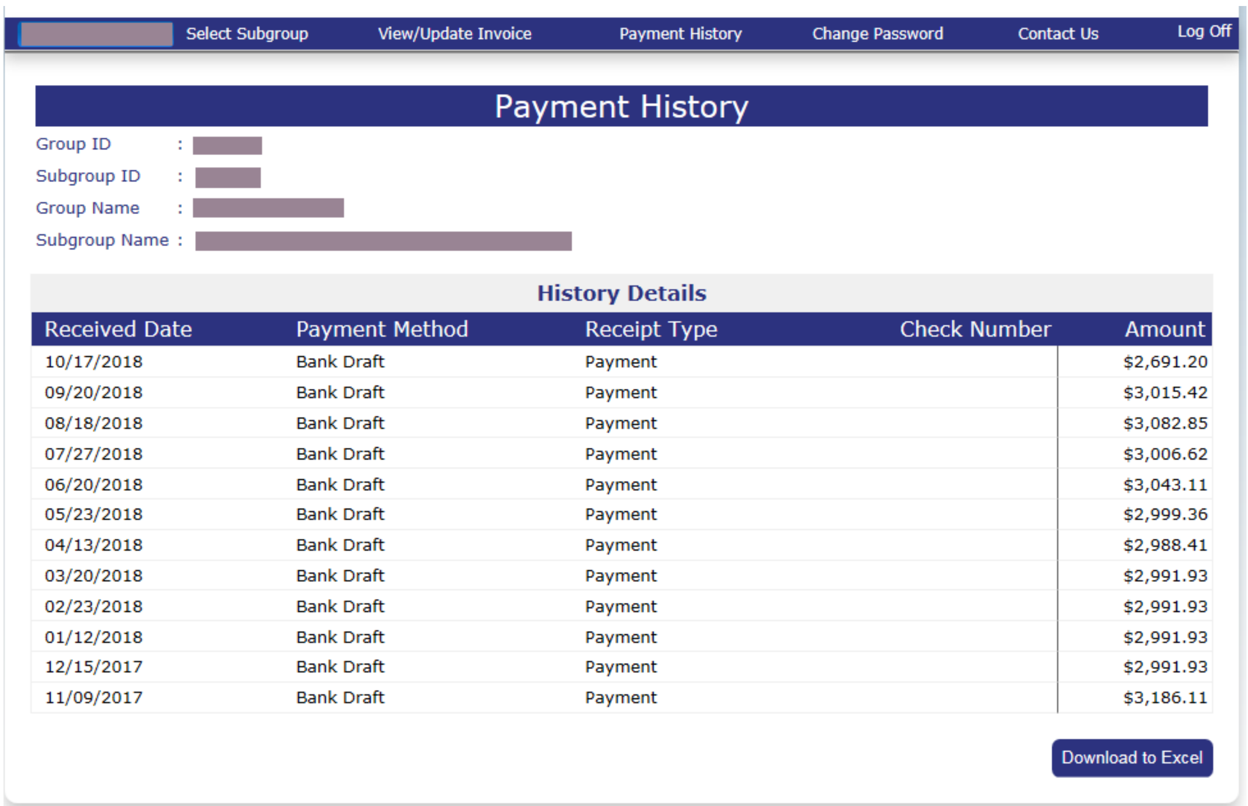
> **Important:** This must be a business day. The current date is populated by default. Click on the > arrow on the pop-up calendar to change to the following month. Please review the selecting a payment date information at the bottom of the screen.

9. Click on the Submit Payment button to submit your online payment and open the confirmation screen.
10. Or, click on the Cancel button to close the MAKE ONLINE PAYMENT screen and return to the Payment Options screen.



11. When the on-line payment is successful, you will see the confirmation screen. This screen displays the following:
    - Payment Confirmation Number
    - Group and Subgroup ID and Name
    - Amount Paid
    - Payment Date
    - Bank Information
12. Print the screen for your records, if necessary.
13. Click <Back to View Invoice> to close the confirmation screen and return to the VIEW INVOICES screen.

Section 4: Payment History



Received Date	Payment Method	Receipt Type	Check Number	Amount
10/17/2018	Bank Draft	Payment		$2,691.20
09/20/2018	Bank Draft	Payment		$3,015.42
08/18/2018	Bank Draft	Payment		$3,082.85
07/27/2018	Bank Draft	Payment		$3,006.62
06/20/2018	Bank Draft	Payment		$3,043.11
05/23/2018	Bank Draft	Payment		$2,999.36
04/13/2018	Bank Draft	Payment		$2,988.41
03/20/2018	Bank Draft	Payment		$2,991.93
02/23/2018	Bank Draft	Payment		$2,991.93
01/12/2018	Bank Draft	Payment		$2,991.93
12/15/2017	Bank Draft	Payment		$2,991.93
11/09/2017	Bank Draft	Payment		$3,186.11

Payment History

To review a twelve-month history of payments, please follow these steps:

1. Click on the Payment History menu option at the top of the screen.
2. The PAYMENT HISTORY screen opens and displays the following information about the payments received:
   - Received Date
   - Payment Method
   - Receipt Type
   - Check Number
   - Payment Amount
3. Verify that we have received your online or mailed payment. For mailed payments, be sure to allow at least one week for mailing time.

Note: There may be some reversals due to keying errors; the correct premium amount should appear after the reversal of the incorrect premium amount.

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 our *eAdministration* website.

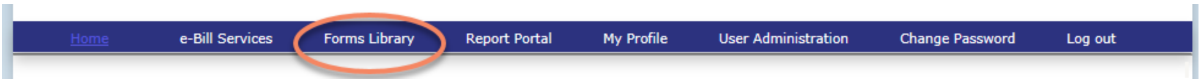
As an external user, the user ID assigned to you will identify the appropriate Contract Situs State and Underwriting Company necessary to provide a listing of available forms.

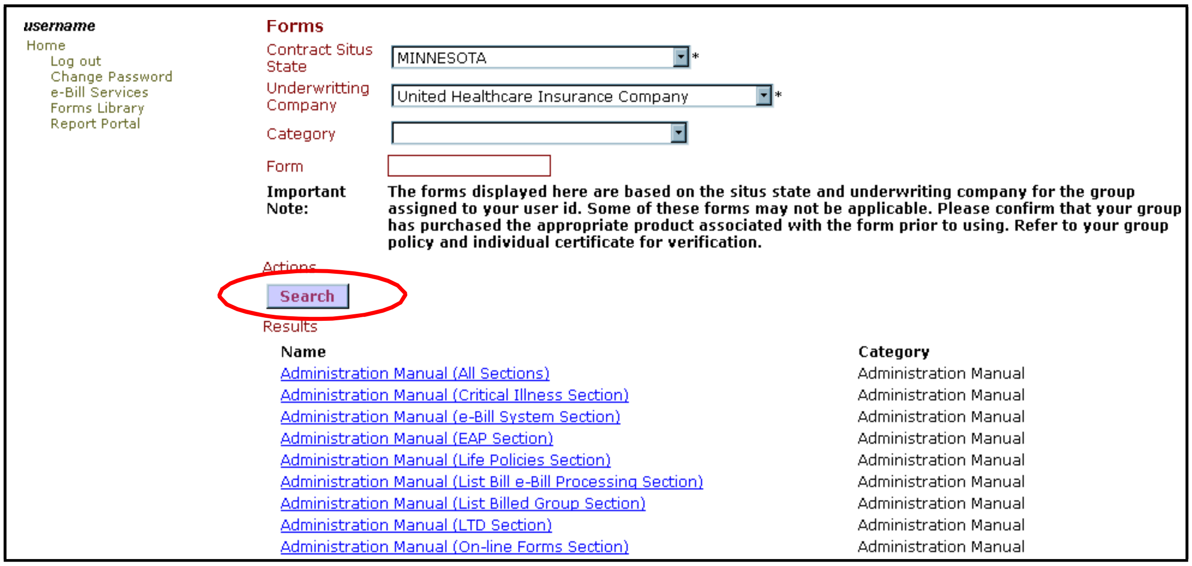
The list of forms can be restricted by selecting one of the following categories:

- Admin 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

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 Format (PDF) into a separate window.
7. To print the form, click on the printer icon on the Adobe Acrobat Reader toolbar.

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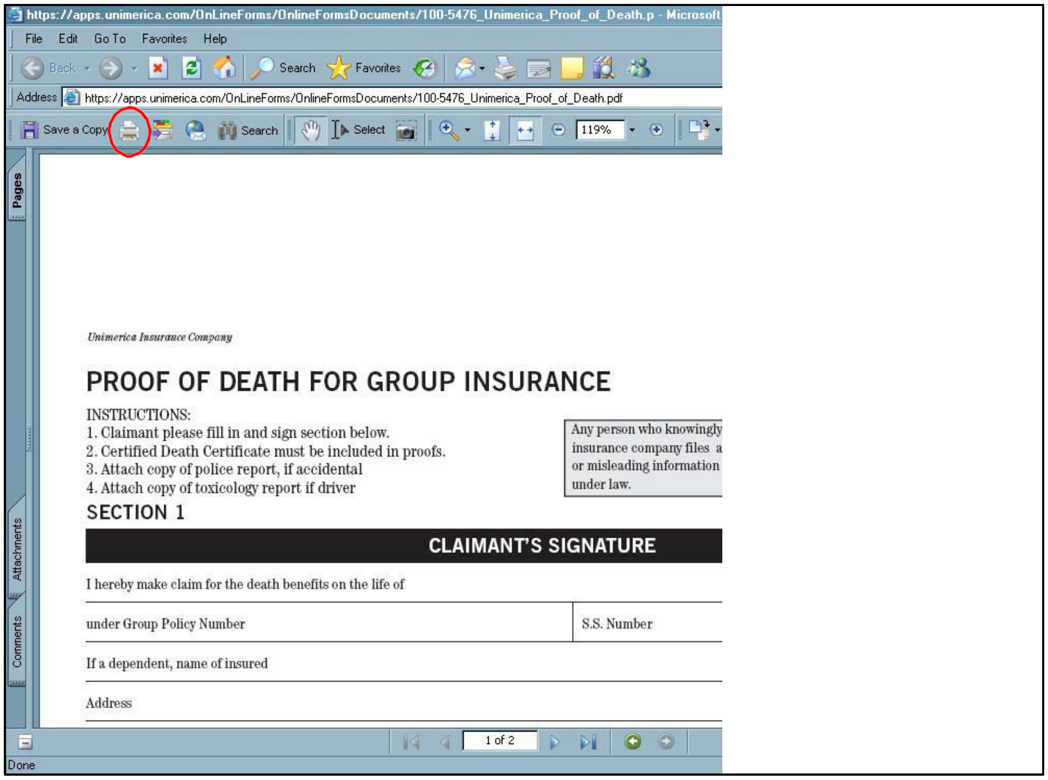
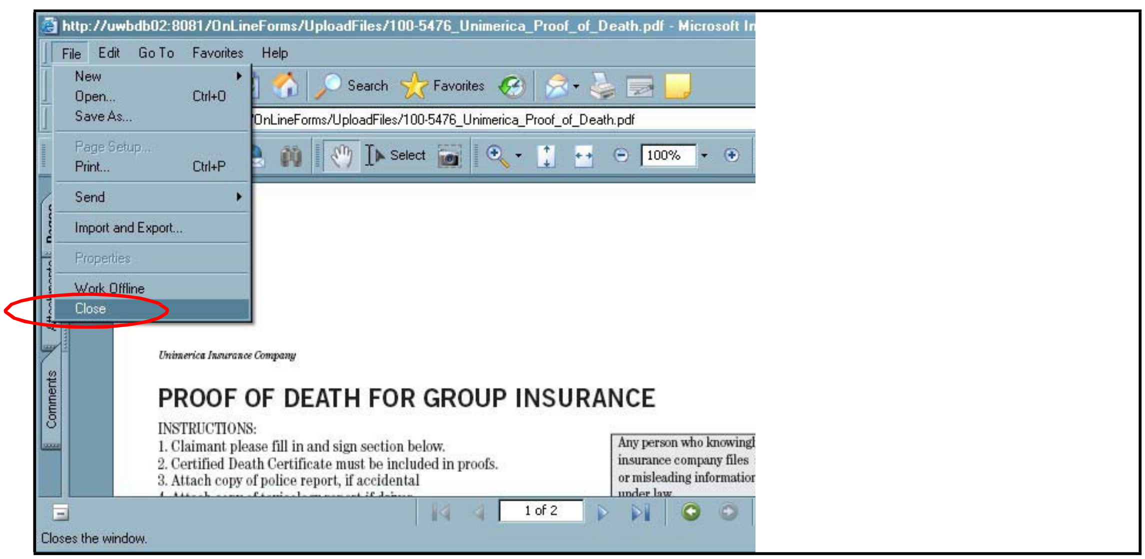
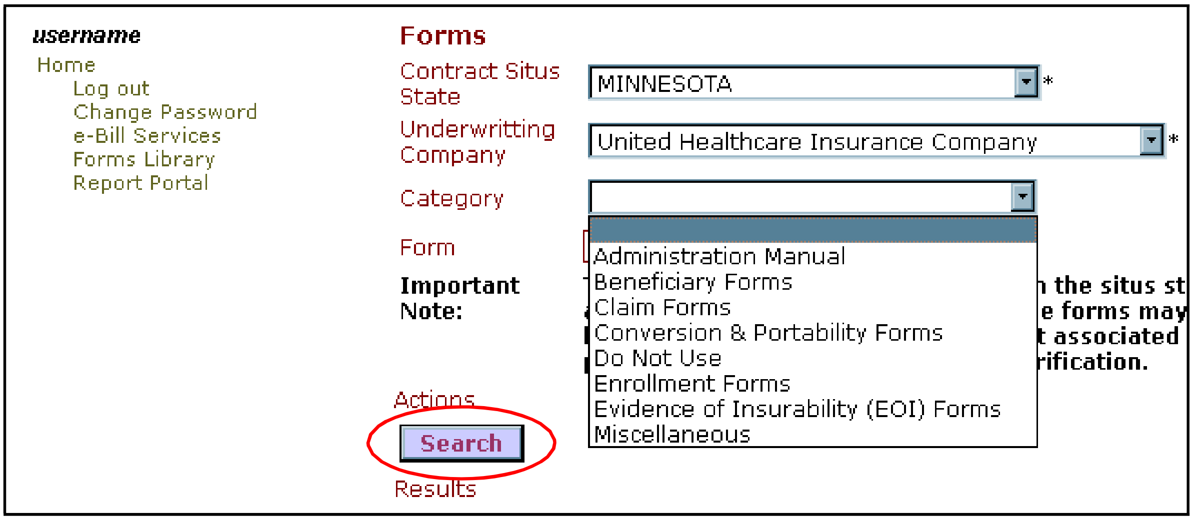


8. To close the Adobe Acrobat Reader window, click on the 'X" at the top right-hand side of the window, or click on the File menu option then click on the Close option.



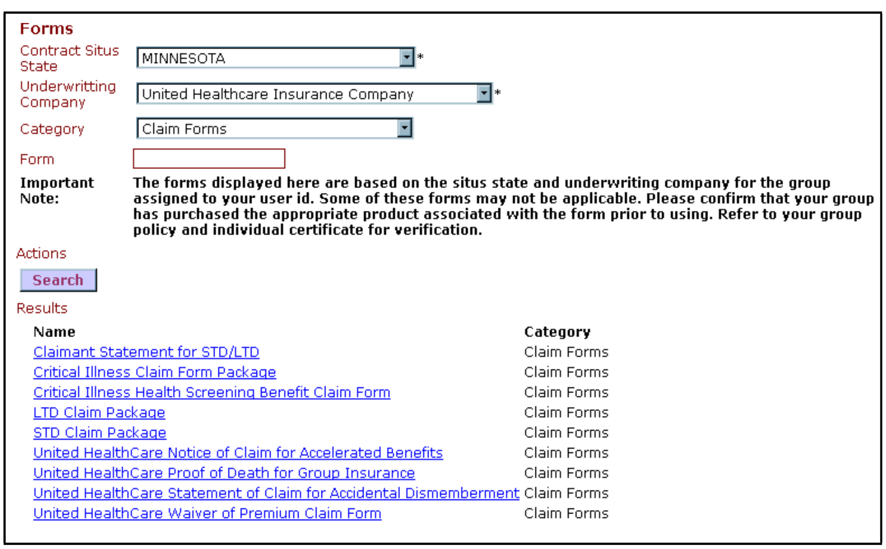
9. To log out of the FORMS Library and *eAdministration* system, click on the Log out link on the menu list located on the left-hand side of the FORMS screen.
10. When you select the Log-out link, or have timed out of the website, the Log In screen will display.

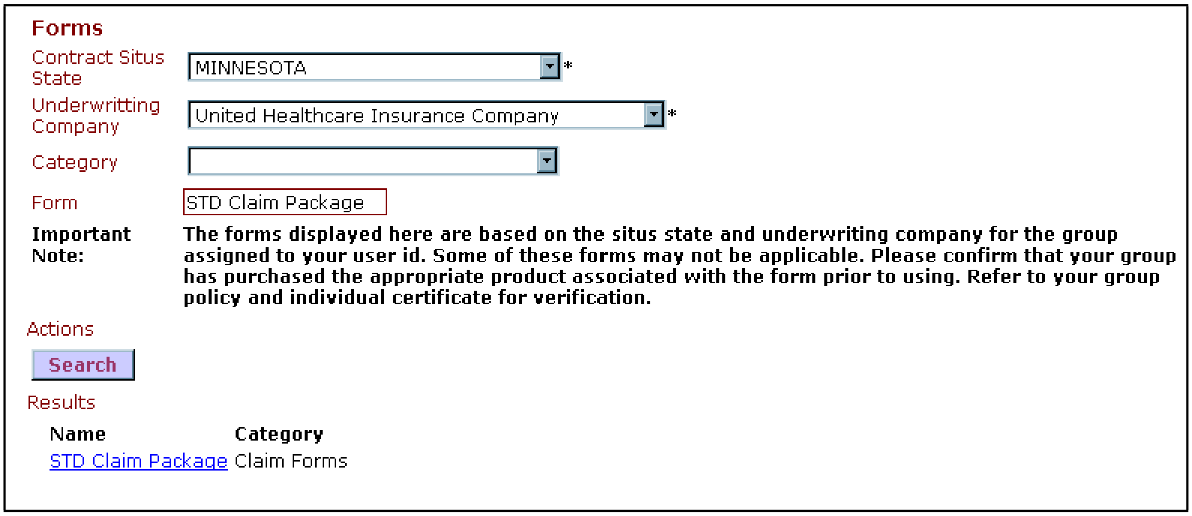


Search on a Category

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.

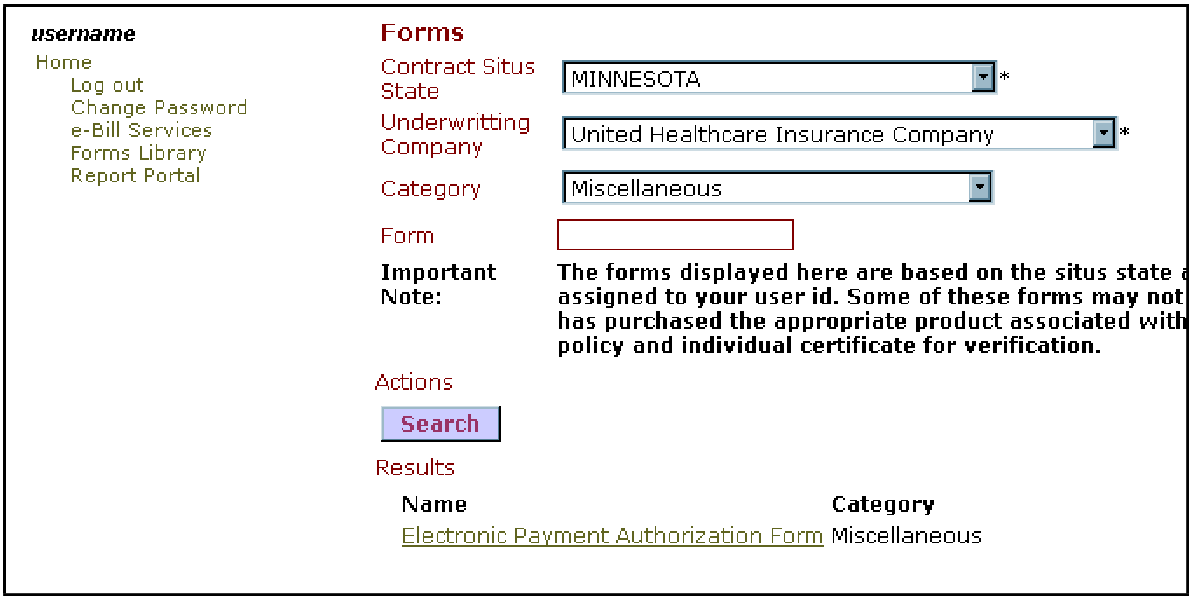




Search by Form Name

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.



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

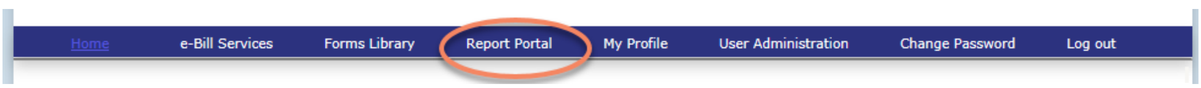
PURPOSE

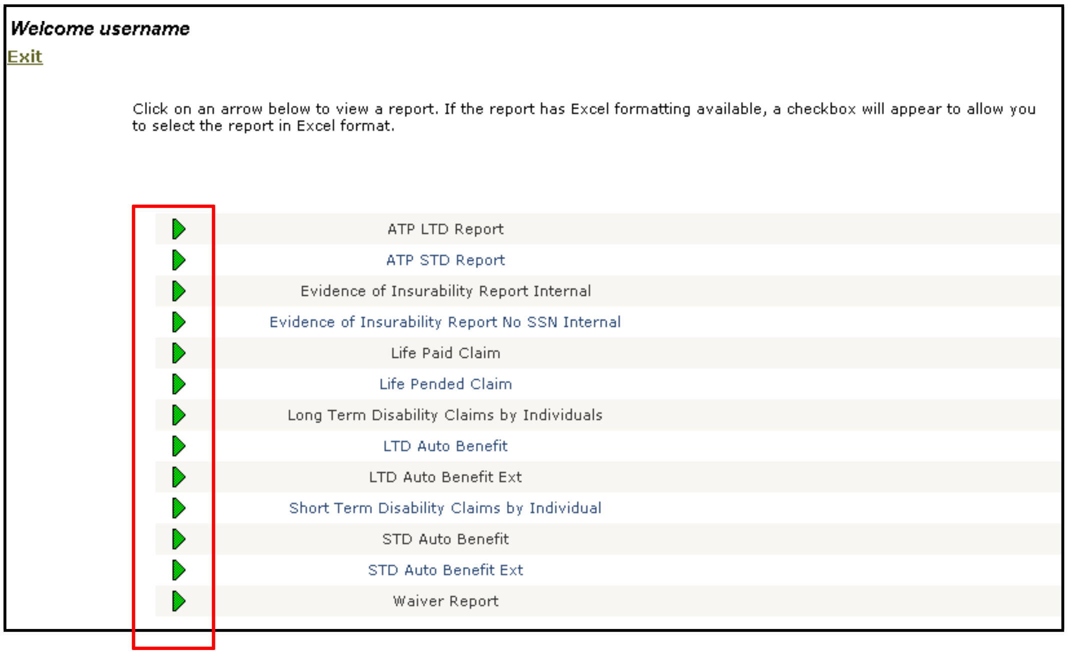
This chapter provides detailed information regarding the Report Portal system on our *eAdministration* website.

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* HOME screen.

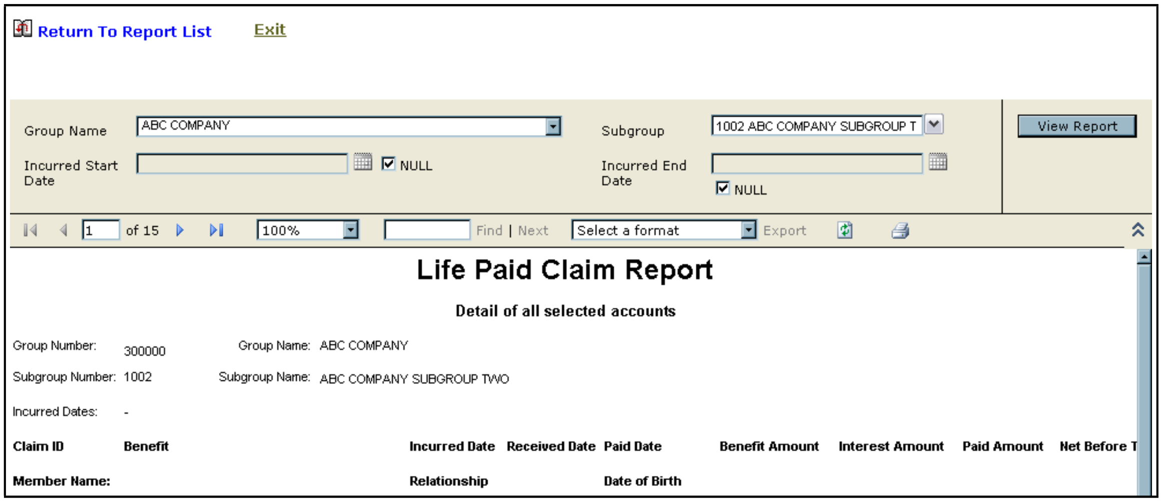




Opening the Report Portal

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 user ID)
    - Report Portal (if assigned to the user ID)
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.

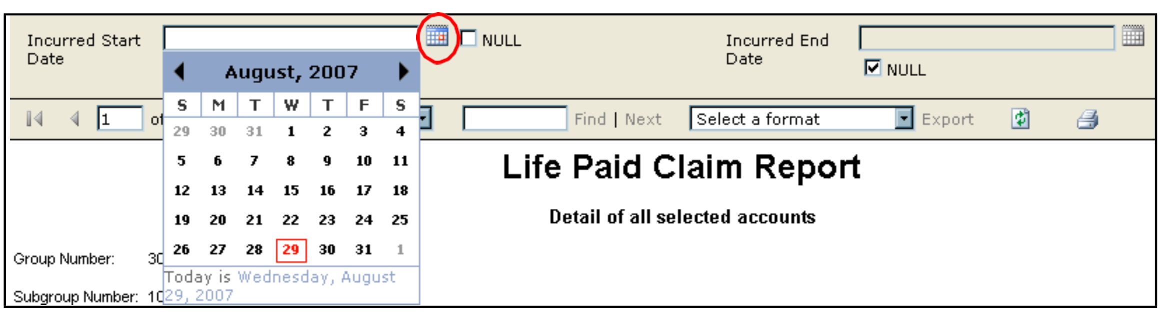


Report Parameter

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



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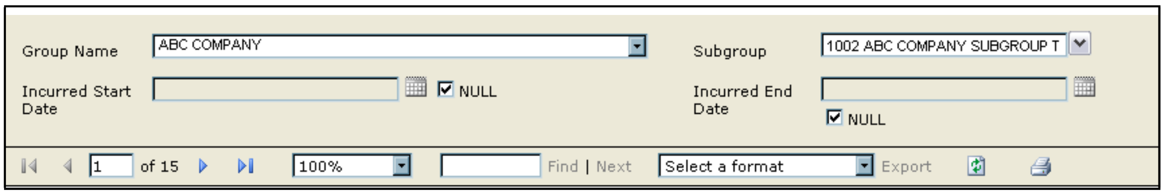
7. For date fields, click on the calendar icon to open the pop-up calendar and select a date.
8. Or, just click on the date field and type in a valid date in mm/dd/yyyy format.
9. Click on the open textbox field that is not a date field and type in valid information.
10. Or, if the field has a down arrow,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

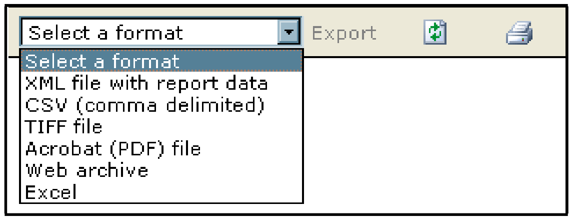


Report Functions

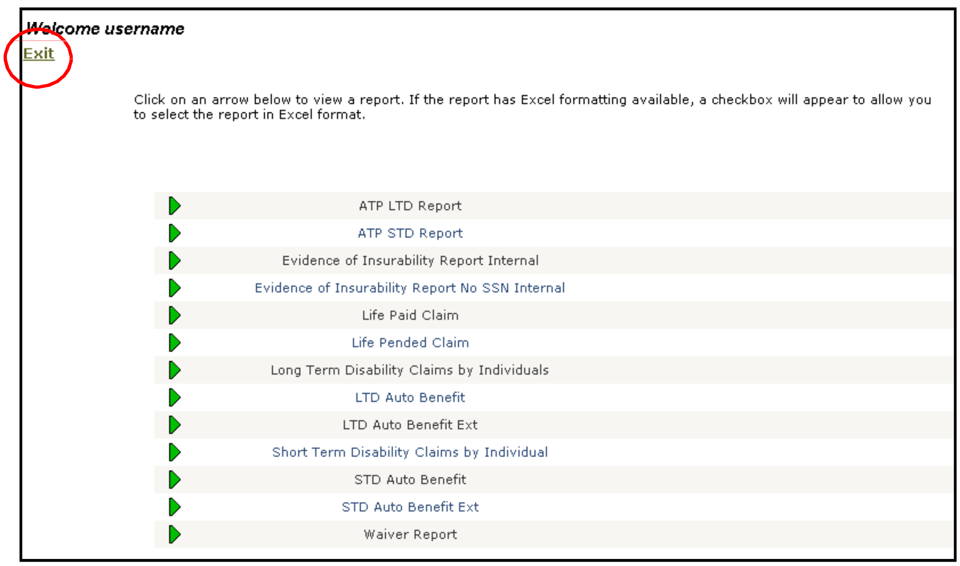
The report displayed on the screen can be viewed on the screen page by page, exported in a different format or printed.

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 to that page.
3. Click on the FIND | NEXT textbox field 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.
5. To export the report into a different format, click on the down arrow on the Export field to open the drop-down list.



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



10. To close the report portal, click on the Exit link. You will return to the WELCOME screen.
11. If you have not timed out of the web site, you may need to also select the Log out link on the WELCOME screen.

12. 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:

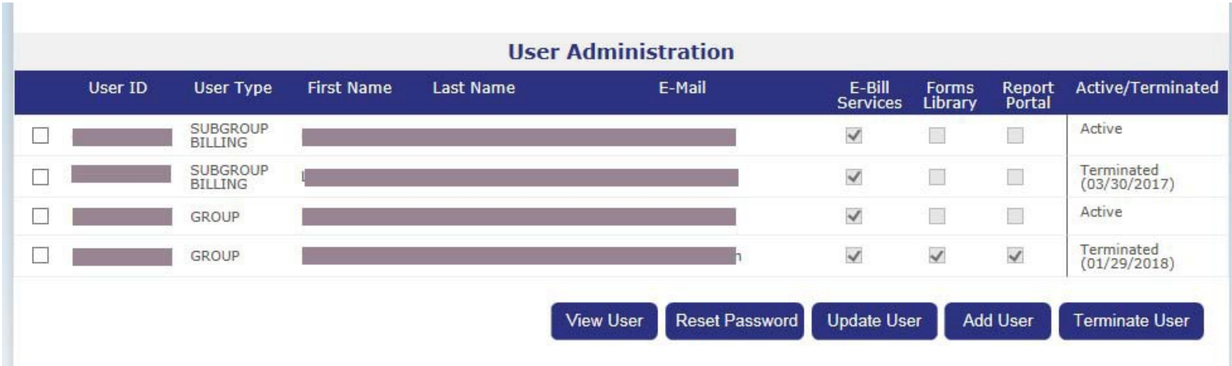
- Add User
- Update User
- View User
- Reset Password
- Terminate User

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



<u>Opening the User Maintenance System</u>

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

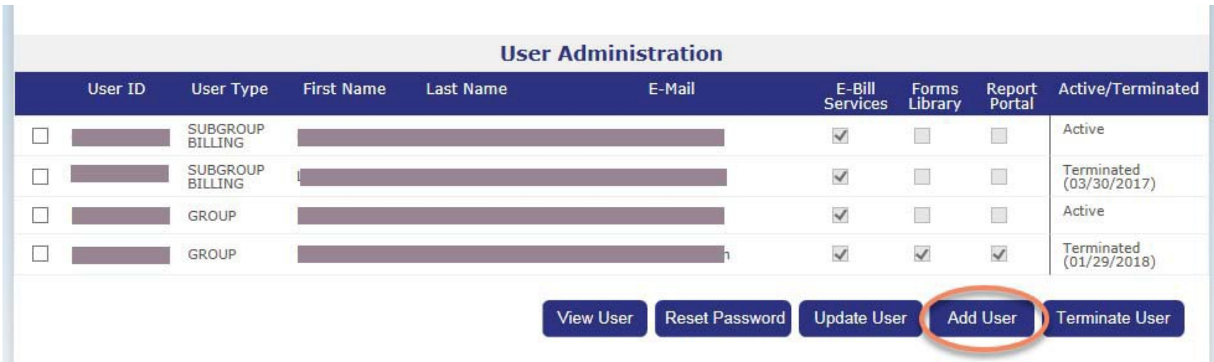
Section 2: Add User

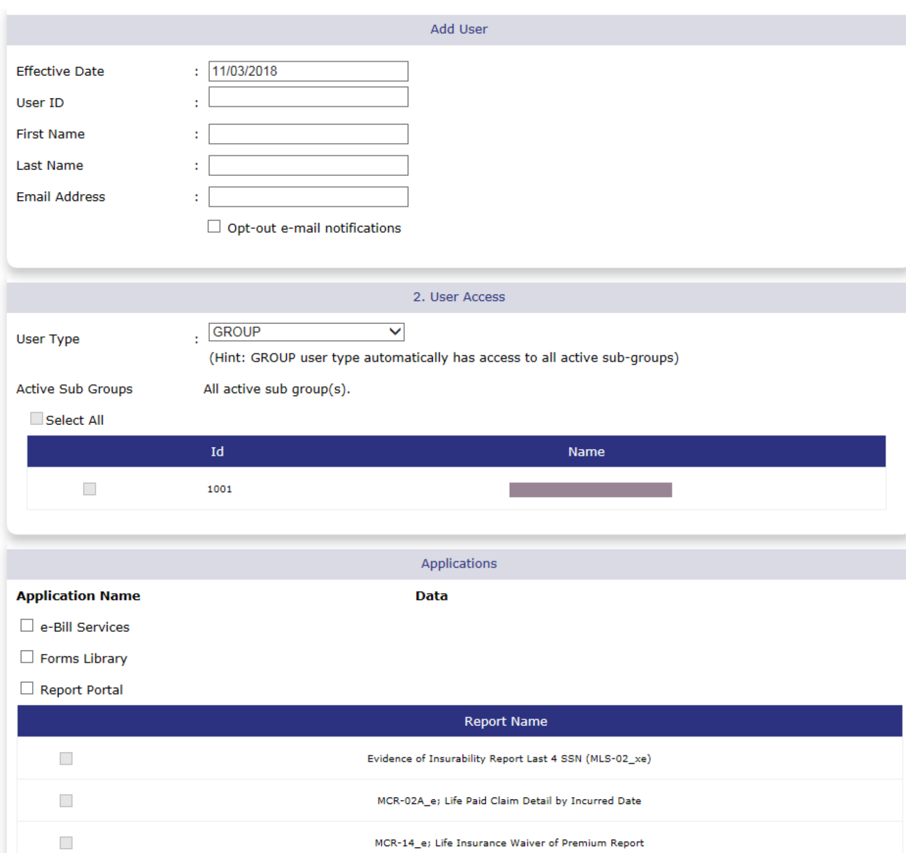
PURPOSE

This section provides detailed information regarding howto add a new user.

BEFORE YOU BEGIN

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

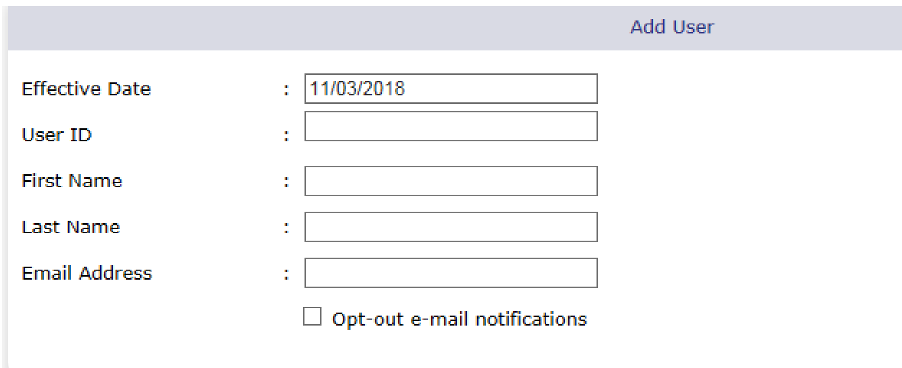




Add User Screen

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



Identity Section

To enter user identity information, please follow these steps:

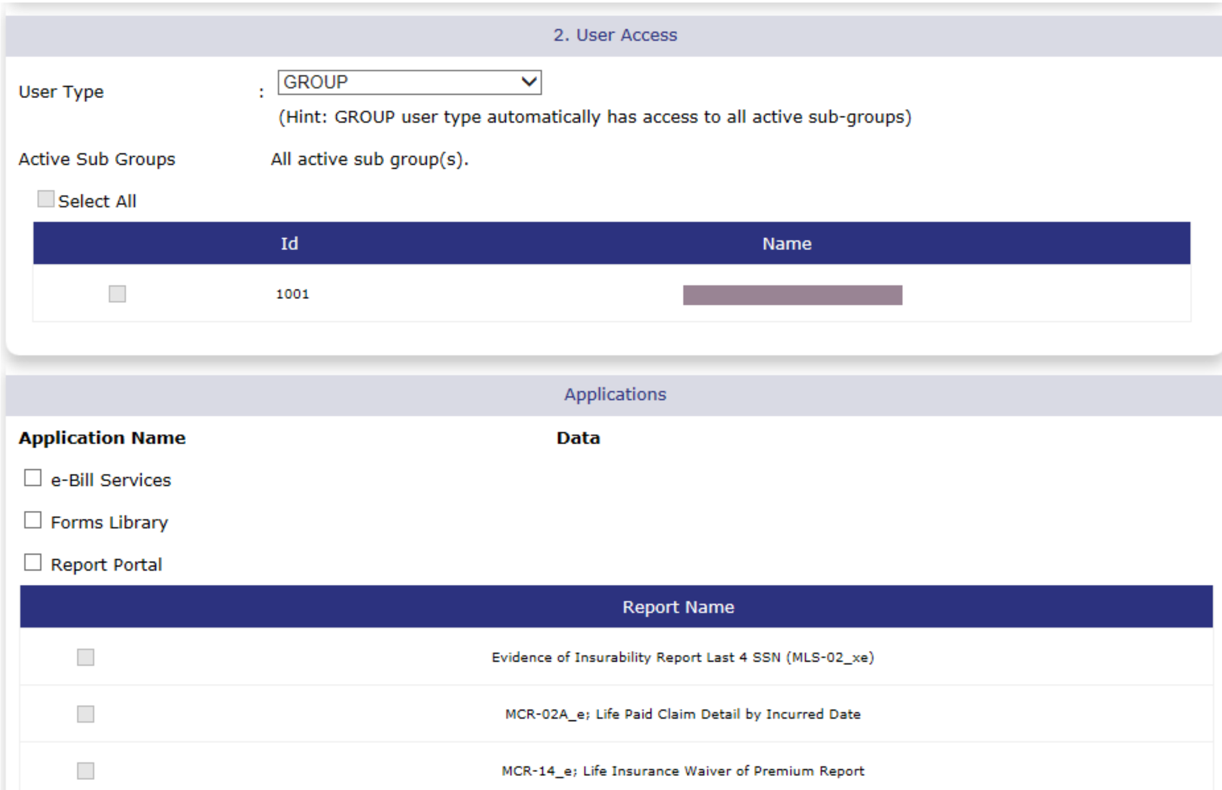
1. Open the Add User screen.
2. To change the default effective date, click on the EFFECTIVE DATE field and type in a future date in mm/dd/yyyy format.
3. To keep the default effective date, click on the USER ID field
4. Type a valid user ID into the USER ID field. User IDs must be at least 8 characters 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.



<u>User Access Section – User Type</u>

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 <u>not</u> 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.

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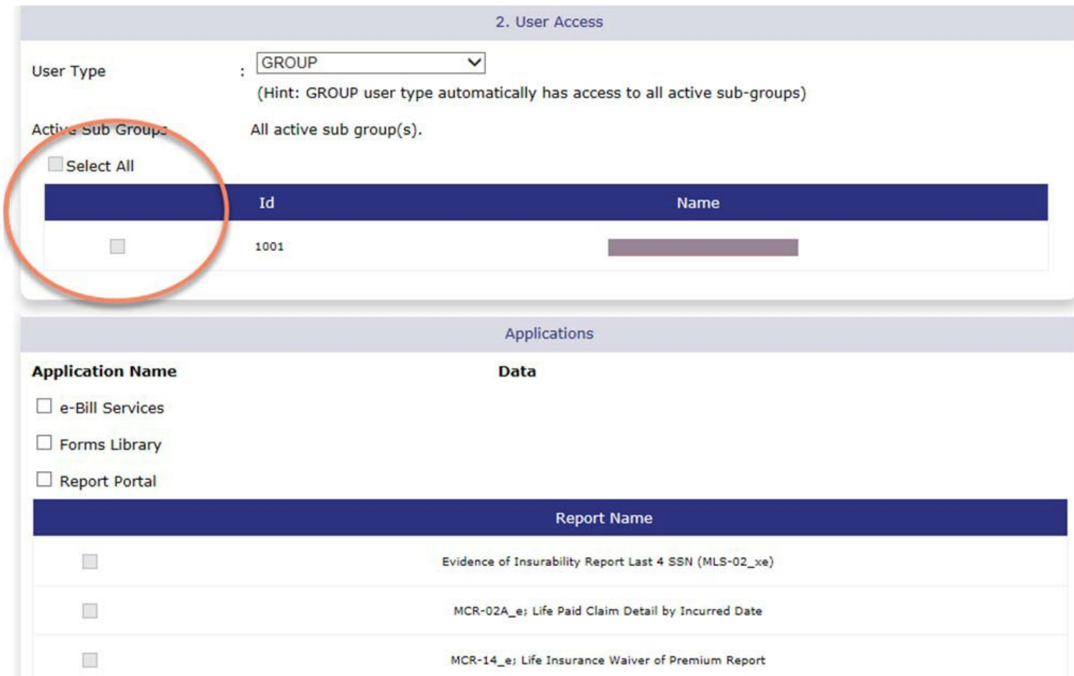

User Access Section – Active Subgroups

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.

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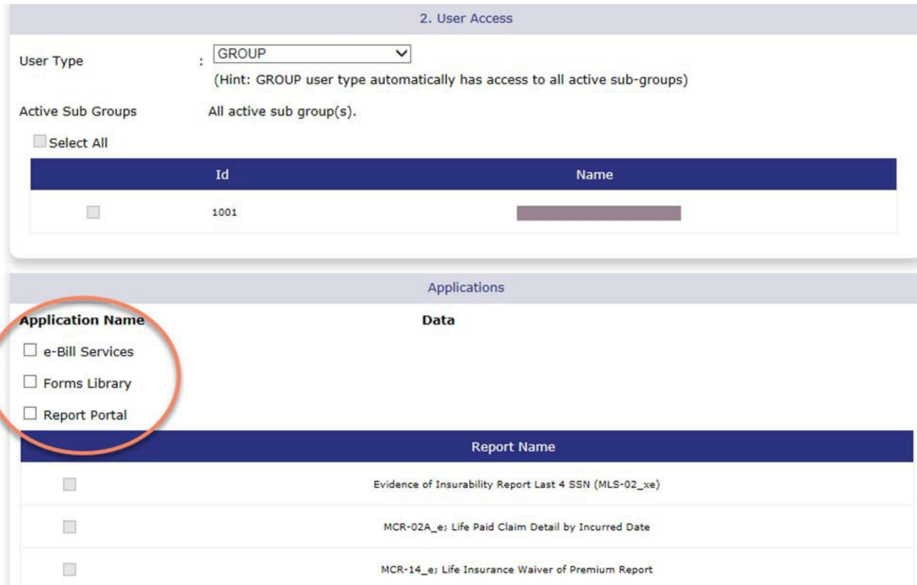


User Access Section – Applications

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.

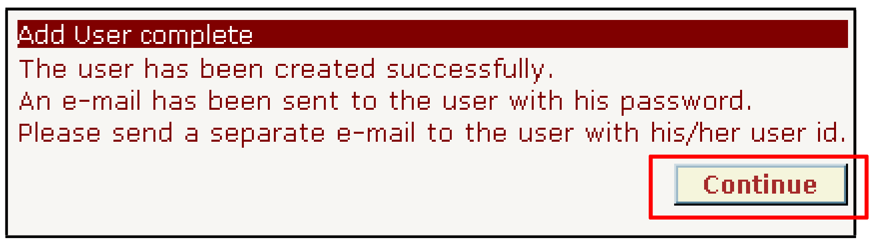
If you selected User Type:	Then user will have eBill Services access for:
Group	**All e-Bill functionality for all subgroups within your organization.**
Subgroup	**All e-Bill functionality for only subgroup(s) specified.**
Subgroup Billing	**Only billing functionality for the Self Billed subgroup(s)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

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:



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

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BEFORE YOU BEGIN

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

<u>Update User</u>

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

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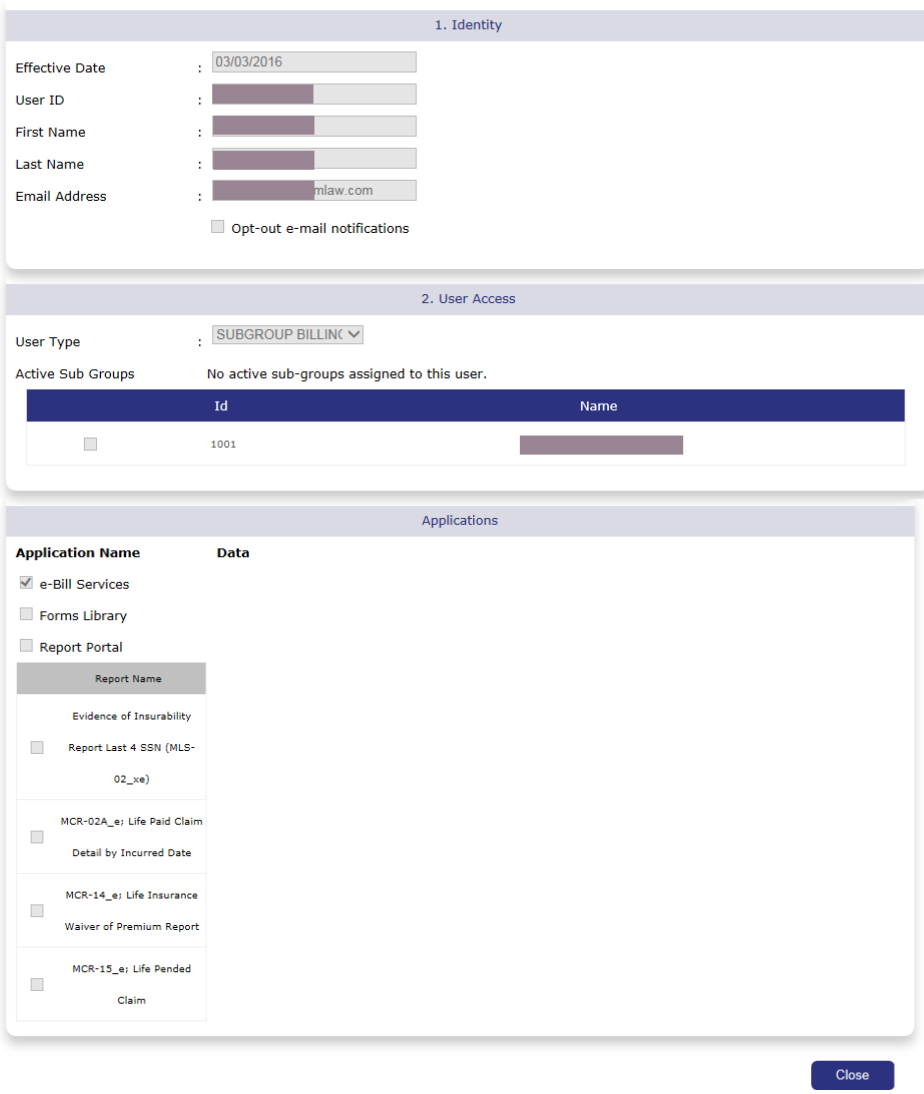

5. Click on any of these identity fields to modify the information entered:
    - First Name
    - Last Name
    - Email Address
6. Click on the checked checkbox for an active subgroup or application to remove it. The user will no longer have access to the data for the subgroup or application.
7. Click 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.

<u>View User</u>

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.

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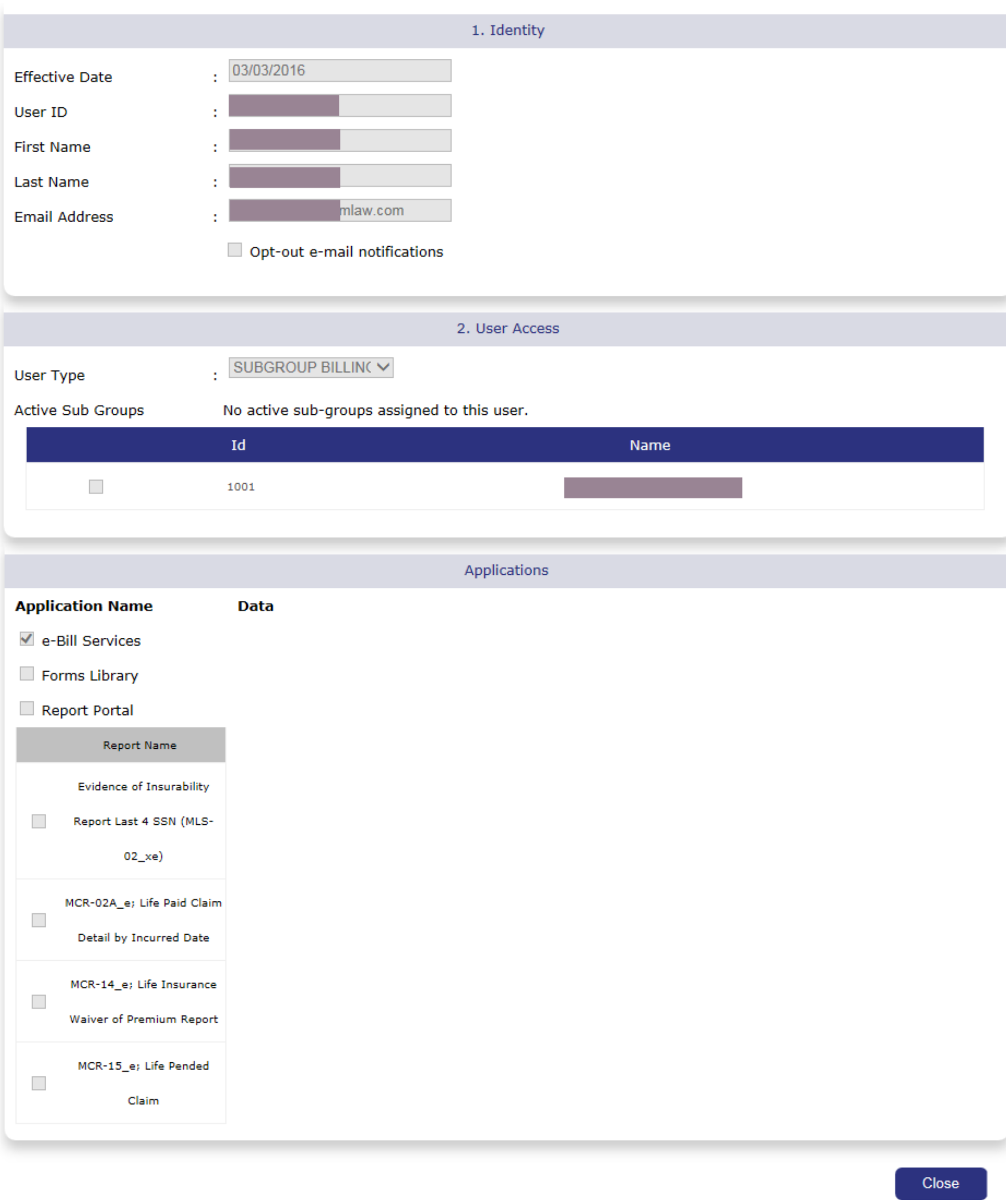


4. All the fields on this screen are disabled and display the current information for the user selected on the USER LISTING screen.
5. Click <Close > to close the VIEW USER screen and return to the USER LISTING screen.

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:

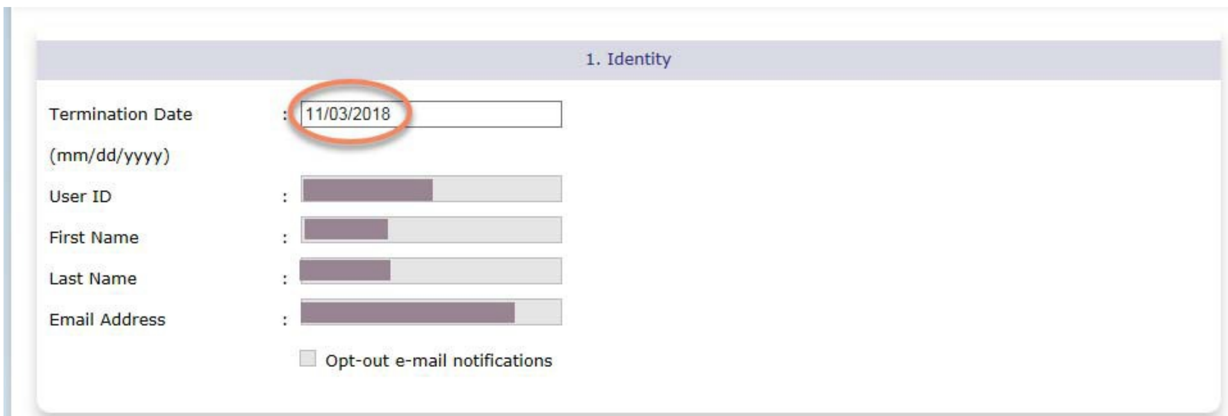
5. The user will receive an email with the system-generated temporary password.
6. Click <Continue > to close the confirmation message and return to the User Listing screen.

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.



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.

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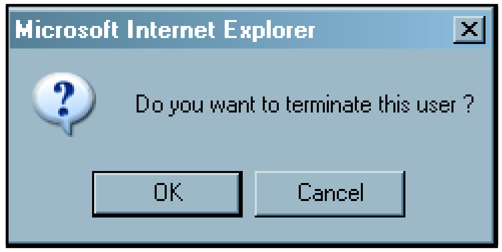
9. The following confirmation message will display in a separate window:



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.
