Employer Portal Instructions

User Guide

March 2017

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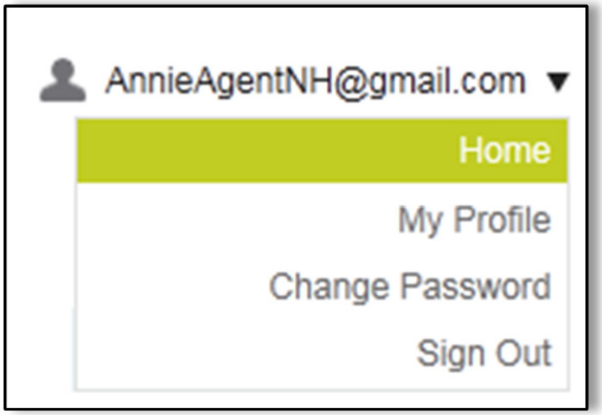
Login Menu

The login menu is displayed when the mouse pointer is hovered over the logged in user's name displayed in the top right corner of the page.



The following table provides a description of the options available in this menu.

OPTION	DESCRIPTION
Home	Redirects to the landing page of the user logged in.
My Profile	Redirects to My Profile page.
Change Password	Redirects to the Change Password page.
Sign Out	Ends the session. If the same computer is going to be used by different users using different credentials, the browser window must also be closed after signing out.

Employer Portal Landing Page

The employer portal landing page is where the employer is directed after successful login. This page lays out the basic group statistics regarding group participation and enrollment, employer's tasks as well as system generated notifications and most importantly the latest change requests generated using the portal.

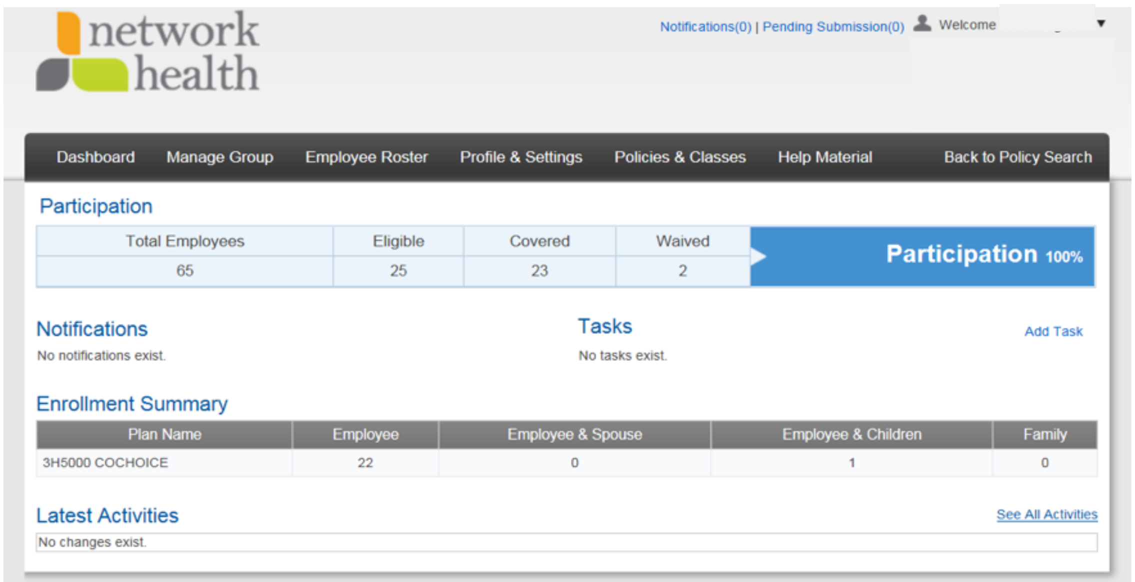
The navigation bar assists in navigating to the desired page and it consists of tabs "Dashboard", "Manage Group", "Employee Roster", "Profile & Settings" and "Help Material".

Enrollment Summary

The enrollment summary section displays the plan types offered. It shows how many employees are enrolled in each plan and the level of coverage that is elected (employee, employee & spouse, etc).

Latest Activities

Shows activities you have done within the last 24 hours.



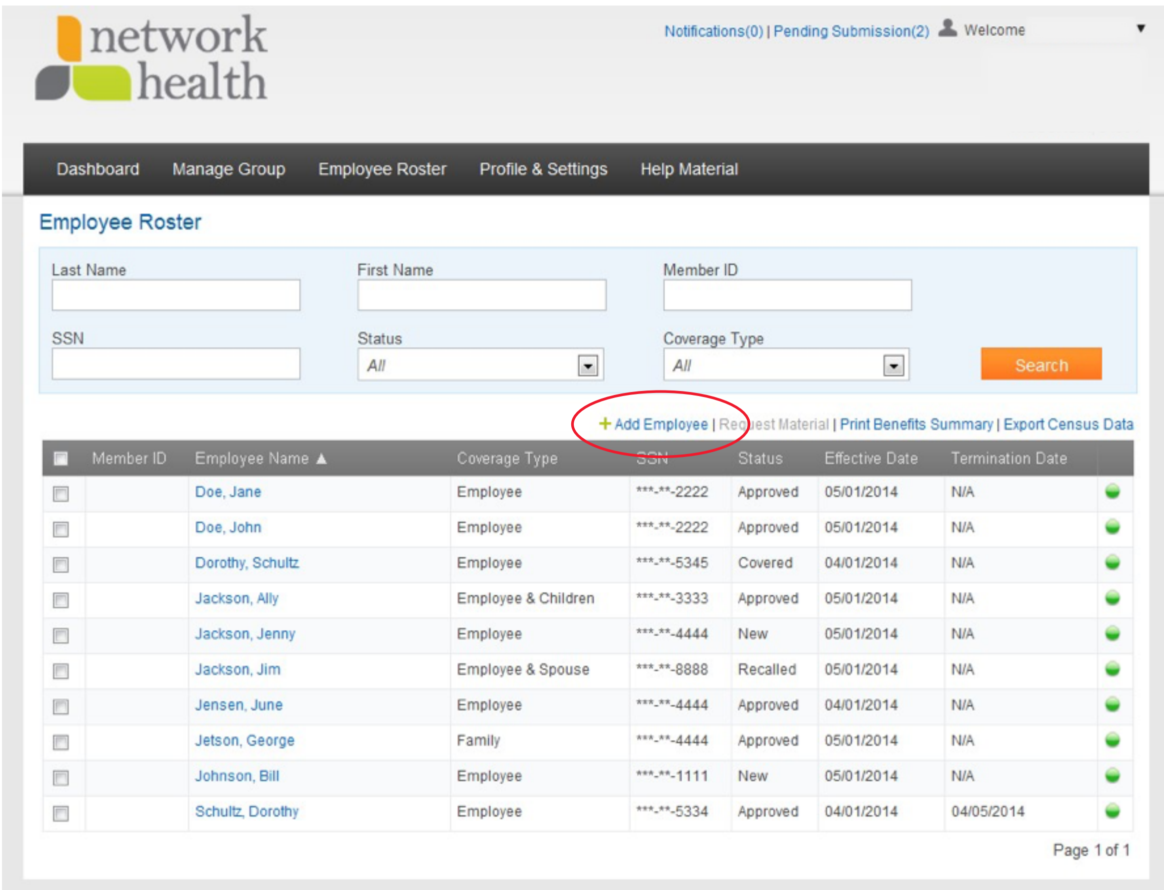
Employee Roster

The employee roster module is used to add, edit and terminate employees and their dependents. Add new employees or edit/terminate existing employees using this module. Dependents can also be added or terminated along with any required plan changes.

View Roster

All the employees enrolled in the initial enrollment are pre-populated in a grid on the **View Roster** page. The employees are listed alphabetically along with their Member ID, SSN, coverage status and coverage period.

Sorting can be applied on any column by clicking on the label of the column.



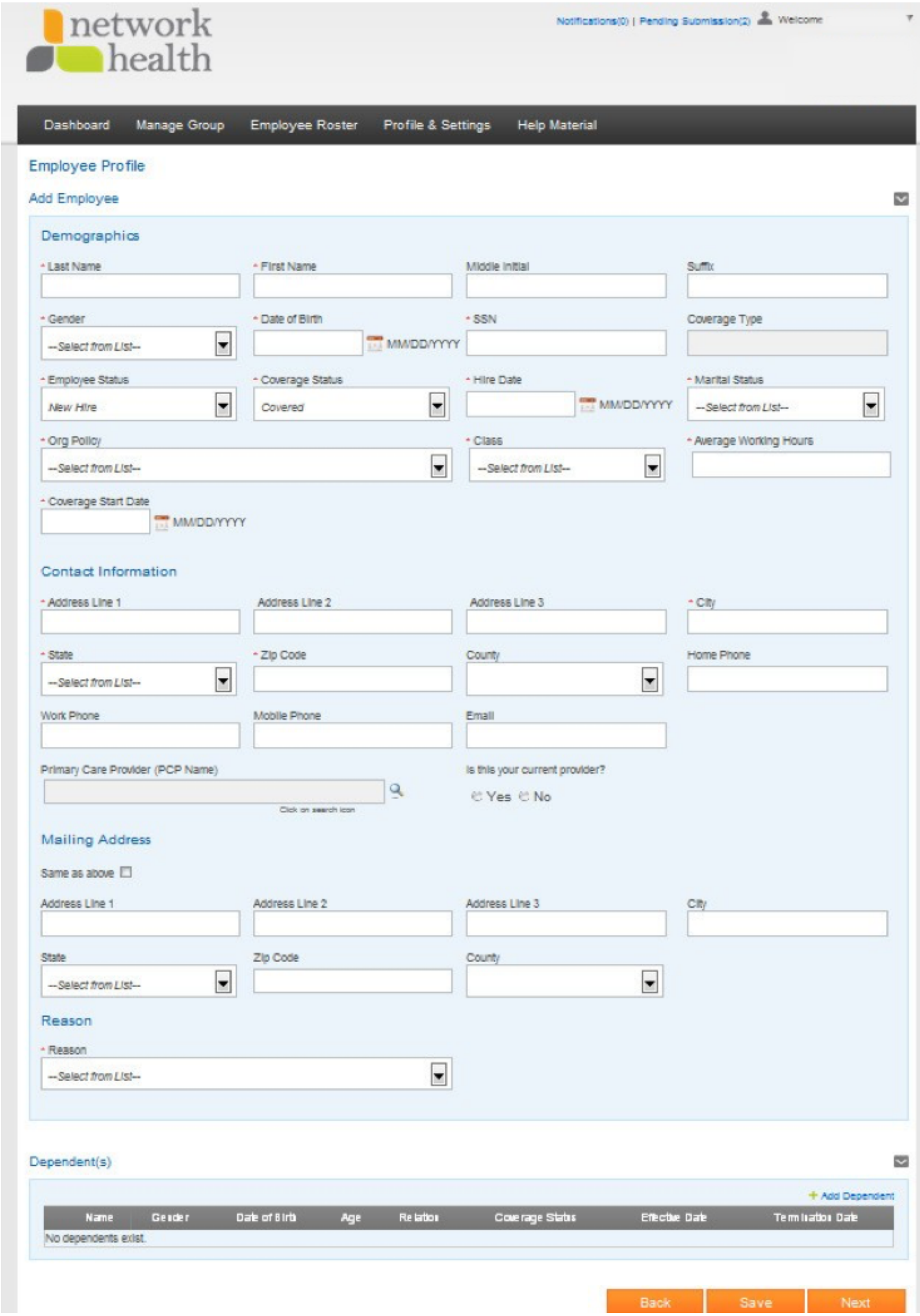
Search for an employee

The administrator can search for any existing employee record by specifying any of the filters given at the top i.e. First Name, Last Name, SSN, Member ID and Coverage Status.

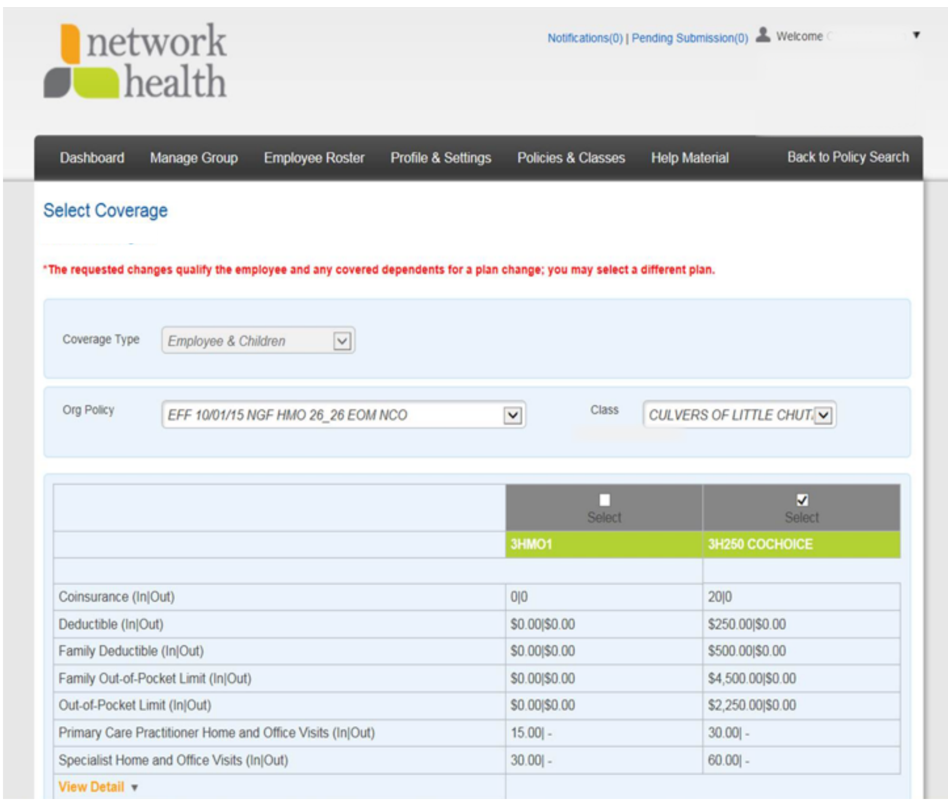
Add an employee/dependent

Enroll a new employee by selecting Add Employee under Employee Roster drop down or by selecting Add Employee when on View Roster page (circled in red on previous screen shot).

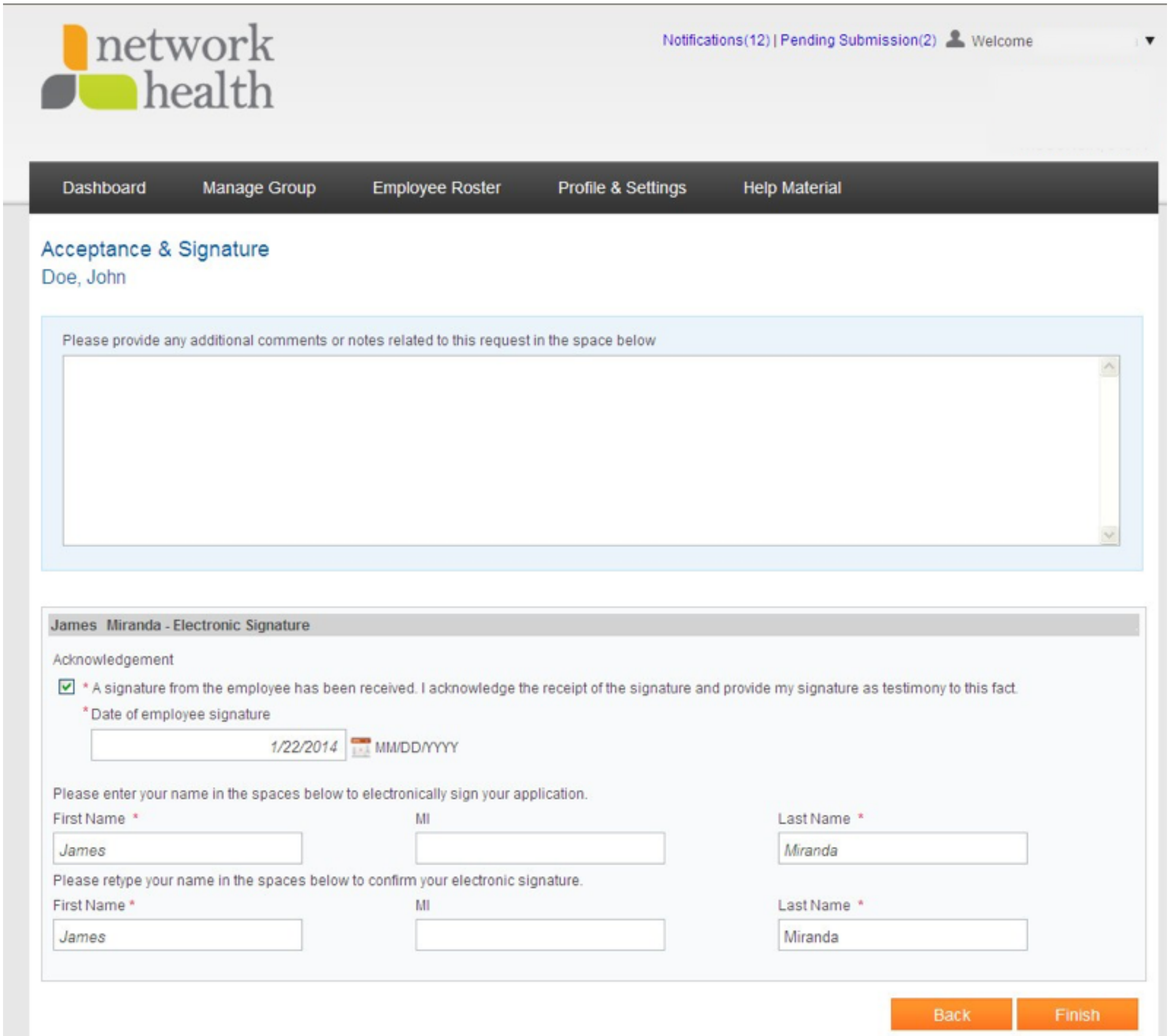
Employee Profile



1. The **Employee Profile** is where the user needs to enter the required fields.
2. Save the Employee information.
3. Dependents can be added by selecting **Add Dependent** (located at the bottom right hand corner of the screen).
4. Select **OK** when the employee and dependent are entered.
5. Select **Add Dependent** to add additional dependents.
6. Select **Continue** to save the information.
7. When multiple plans are available and the employee has a qualifying event, select the check box for the plan the member selected.
8. Select **Continue.**



9. Enter any additional comments or notes and complete the **Electronic Signature** section, the electronic signature must match with the person who is signed in.



10. Click **Finish.**

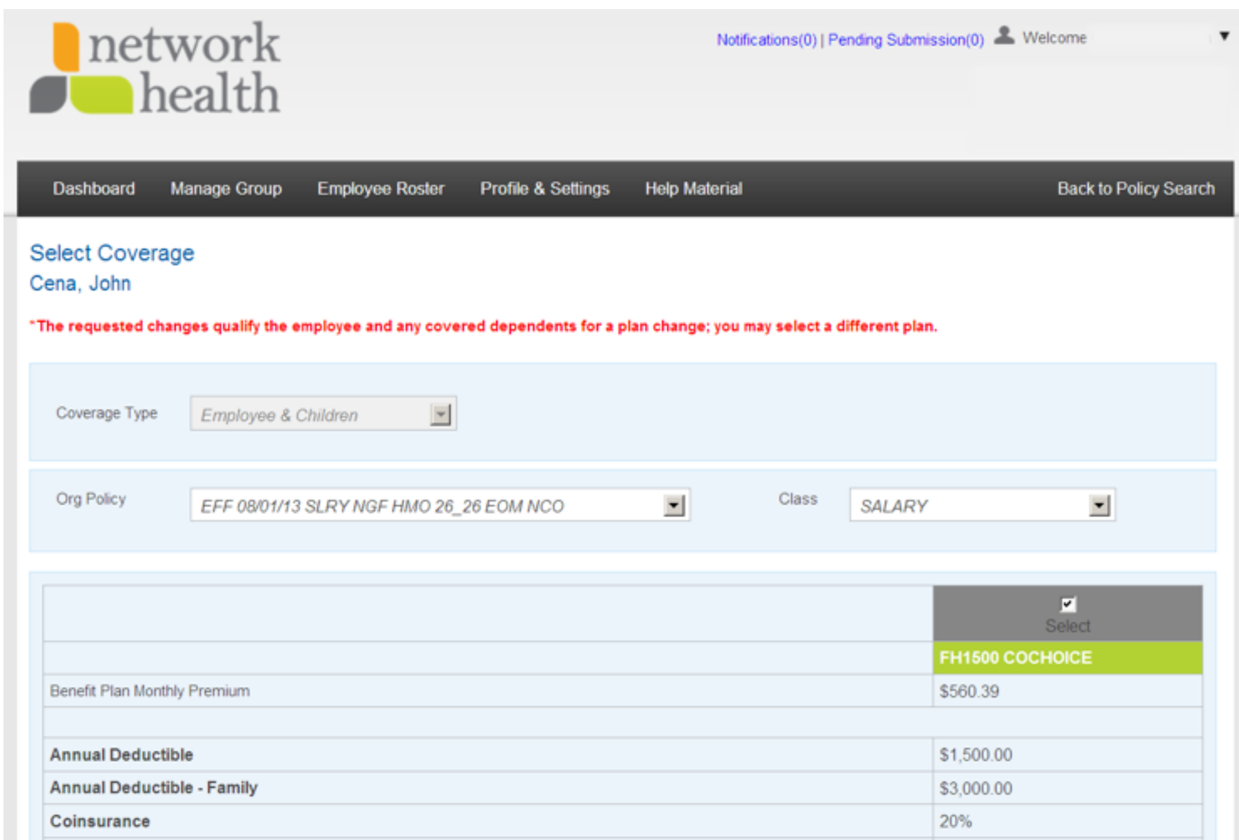
Edit an existing employee/dependent

1. Navigate to the **View Roster** page and **select the employee.**
2. Click **Edit Profile** in the upper right corner of the window.
3. Edit the data as needed.
4. Select a **Reason** from the dropdown.
5. Click **OK**.
6. Click **Save** at the bottom of the window when all the changes have been made.
7. When making dependent changes for each dependent, do the following.
   a. Click **View/Edit** to the left of the name.
   b. Make the necessary changes.
   c. Select reason from the drop down.
   d. Click **OK** to save the changes and select save at the bottom of the window.
   e. When the group offers more than one plan, the system will take you to the benefits election page where you can change benefits.

Qualifying events for plan change

In order to change an employee's plan, a qualifying event must have occurred such as marriage, divorce and death etc. Plan changes can only be done with a first of the month effective date.

From the employee's profile, add or terminate a dependent. Once the dependent details have been added or the dependent has been terminated, select **Continue** which will redirect to the **Select Coverage** page. Finally, fill the **Acceptance & Signature** page details and select **Finish** to complete the change request.



8. Enter any additional comments or notes and complete the **Electronic Signature** section, the signature must match with the person who is signed in.

Terminate an employee/dependent

1. Navigate to the **View Roster** page and **select the employee**.
2. Click **Edit Profile** link.
3. Change the E**mployment Status** to **Terminated**.
4. Change the **Coverage Status** as either **COBRA** or **Terminated**, whichever is required.
5. Select reason of termination from the **Reason** dropdown and enter date of event.
6. Click **OK** to save the changes.
7. Click **Continue** to go to the **Signature** page.
8. Enter any additional comments or notes on the **Acceptance & Signature** page.
9. Check the box that indicates the employee acknowledges the receipt of the signature. **This is a required field**.
10. Sign the **Signature** portion, the name must match in each field and must match the person signed in.
11. Click **Finish**. See **Submit Changes** to submit to Network Health (refer to page 10).
12. In order to terminate a dependent, click **View/Edit** of that dependent and change their **Coverage Status** to **Terminated** and select a reason from the **Reason** dropdown.

Submit Changes

Once a change is made to an employee, the change needs to be submitted to Network Health.

1. Navigate to **Submit Changes** page.
2. Select the employees for which the changes are to be submitted.
3. Click **Submit**.
4. The system runs the defined business rules to evaluate the changes being sent, once evaluation is completed, the changes are submitted to Network Health.

OR

1. You can also Navigate to **Manage Group >Submit Changes** or select **Pending Submissions** then select the member(s) the changes were made on and submit.

Note: Once a change request has been submitted for an employee, no further actions can be performed on the employee. Once Network Health sends its approval, the change requests will be removed from the activities log and further actions can be performed for that employee.

Submit Changes (refer to screen shot on page 10)

From your home dashboard **Manage Group >Submit Changes** page, they can view the list of all group user activities.

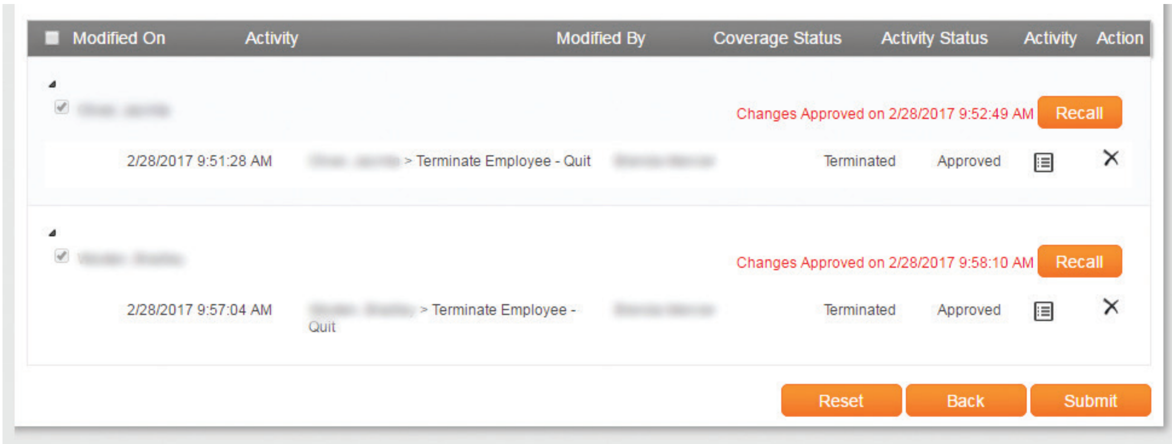
These activities include the date and time on which the change was initiated along with the module and reason for the change, the user who initiated the change as well as the change request's status. These statuses are as follows.

New: Indicates that these are saved in the portal, however, they are yet to be submitted to Network Health for approval.

In Process: Changes that are being assessed by the system before submitting them to Network Health.

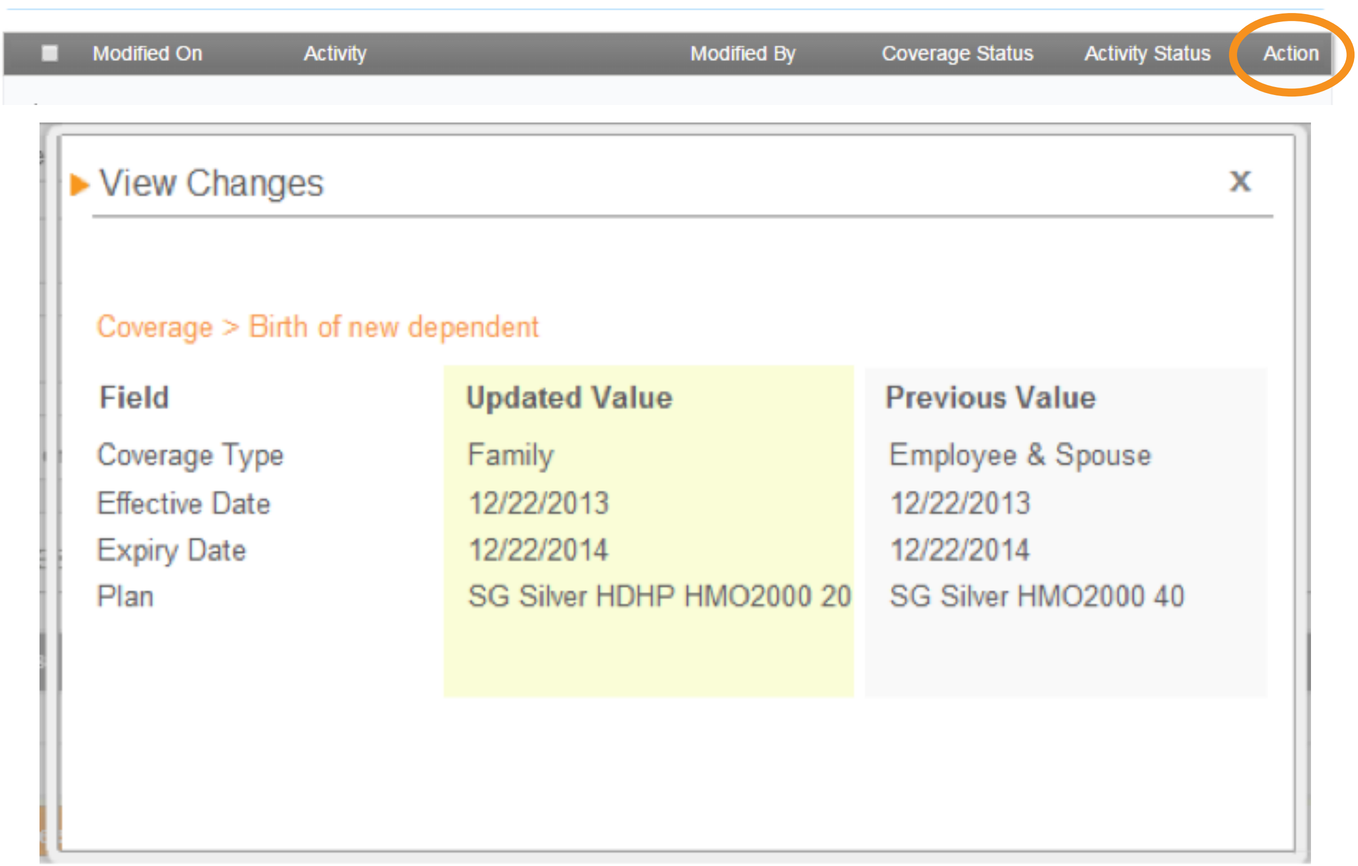
Submitted: These requests have been submitted, however, they are yet to be approved by Network Health.

Approved: Requests that have been approved by Network Health and are in effect.



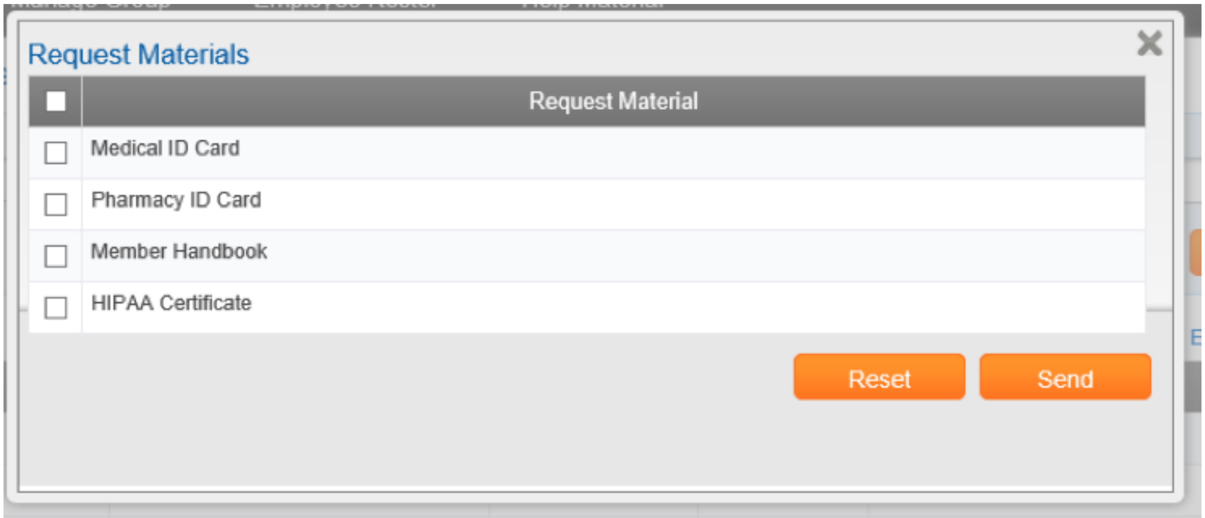
Action

For any change request, click Action on the right side to see the details of the change request as shown below.



Request Materials

The Request Materials link in the Employee Roster is used to initiate a request for material. The request is sent to Network Health.



1. Navigate to **View Roster** page.
2. Select the employee(s) for which the material is required by checking the checkbox for each employee's record.
3. Click **Request Material**.
4. Select the required material and hit **Send**.
5. A notification is sent to Network Health that includes the name of the selected employee(s) and a request for the materials.
6. Click **OK**.

The materials will be delivered directly to the member in seven to 10 business days.

Print Benefit Summary

In order to export the details of each employee's coverage along with their dependents, click **Print Benefit Summary**.

Enrollment History

The Enrollment History page displays information about changes made to an employee. Information included on the page is the date the change was made, what the activity was, who made the change and what the current status is of the change.

1. Navigate to Enrollment History page under the Employee Roster module.
2. Specify an employee name or leave the search fields blank to view all employees. If all employees are viewed, the arrow that points down and to the right will collapse the employee and the arrow that points right will expand the employee's information.