



Group Portal User Guide

Independence 

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Introduction to Group Portal

About Group Portal

The **Group Portal** is a platform to manage all client group administration. It is designed with our clients' and advisors' needs in mind. This new portal will deliver an improved layout and a better user experience. This includes a streamlined, modern appearance that resembles design principles in the recently enhanced Member Portal.

The new Group Portal will maintain capabilities that clients have come to expect from their portal experience while adding features and capabilities for improved user experience.

Transition to Group Portal

Aligned with the transition to the new platform, client group administration will transition from the current Employer Portal (Group Administration Platform) to the new **Group Portal**. Clients will retain access to the **Employer Portal** until all their groups are fully converted. For a client, the access will only be removed when all the associated groups are transitioned fully. Access will be removed on the date of the full transition.

Of note, enhancements are being released for the **Member Portal**.

- Beginning in June all members will have an enhanced digital experience when logging in to websites or through mobile apps.
- The enhanced mobile app launched in December.
- The updated capabilities and personalized content include personalized alerts and health check reminders based on member care gaps.

Group Portal's User Experience

Consistencies

Core functions will remain, including member enrollment and maintenance, electronic billing/payment access, and spending account management access.

The Group Portal will continue to provide access to the Index, inclusive of Membership Reports, and access to SBCs and Benefit Highlights.

Existing user accounts will be enabled on the new Group Portal; re-registration will not be required.

Enhancements

The Group Portal provides an enhanced user experience through the features listed below.

- Enhanced security with multi-factor authentication.
- Reduced clicks by removing the landing page.
- Self-service access to Stop Loss reporting.
- Single-click access to Billing, Spending Accounts, and Member Enrollment.

Other Changes

The self-funded clients will have a temporary link to the eBill for retroactive visibility and the ability to pay runout invoices.

Accessing the Group Portal

Access Fast Facts

- The existing Employer Portal user account permissions are mapped to the Group Portal*, so you will not have to set up a new account. Upon first login, you must accept the terms and conditions.

** If your username is your email address, you will need to create a new account as this does not pass the new security measures.*

- Group portal accommodates both General Agency and Producing agency access.
 - A future enhancement will provide a new role: Client Admin, which will allow the employers to grant access to new users themselves.
 - Clients with dual maintenance** will have access to the Group Portal and Employer Portal.
- ** Dual maintenance applies to the specific clients that have access to the new Group Portal and the Employer Portal for the same group. It covers the updates made in the Employer Portal that must port over to the Group Portal when the detail becomes effective on the new platform.

Group Portal Access

Employer Group Administrators will access the Group Portal via the **Login Screen**. The first time you log in to the Group Portal, you need to set a new password and set up multi-factor authentication. Once done, you can just follow the [login process](#) to log in to the Group Portal.

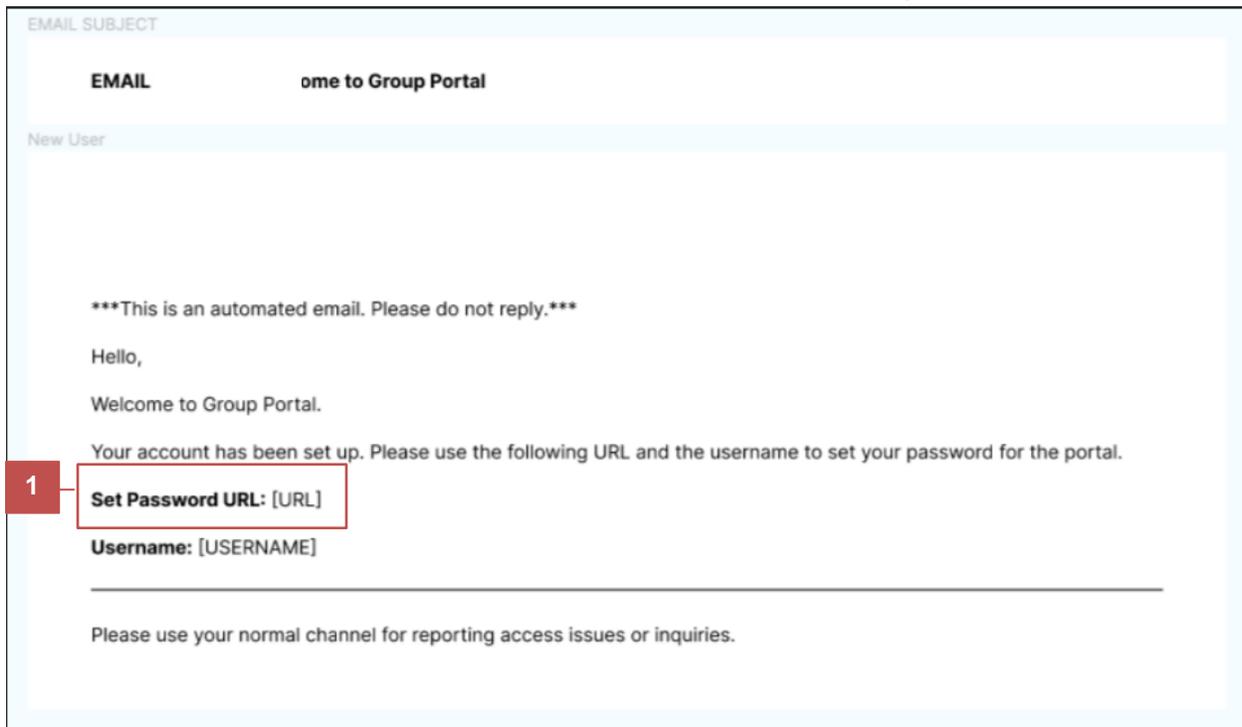


Clients migrating automatically from the Employer Portal to the Group Portal will not need to set their password. They can log in to the Group Portal using their credentials following the [login process](#).

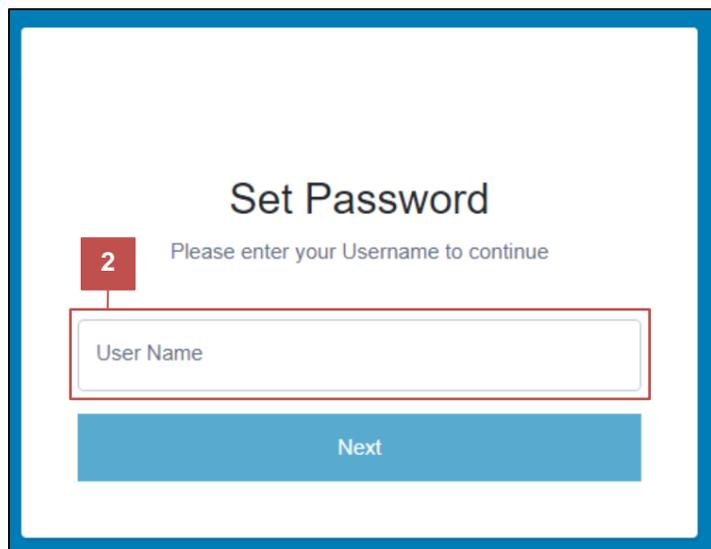
Set Password During First Login

Here are the steps that the new user must follow to log in to the Group Portal for the first time once the user is added:

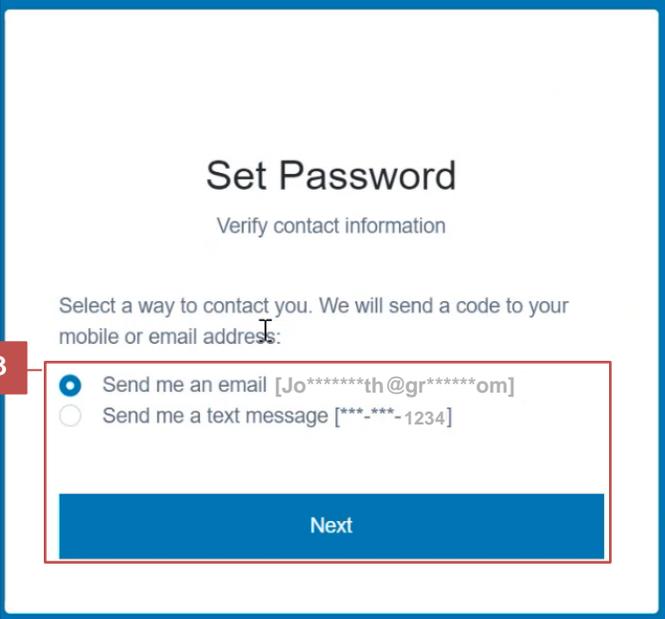
1. Once the user details are reviewed and submitted, the user will receive an email notification. Click the link in the email to set your password for Group Portal login.



2. Enter the username in the **User Name** field as provided in the email and click the **Next** button.

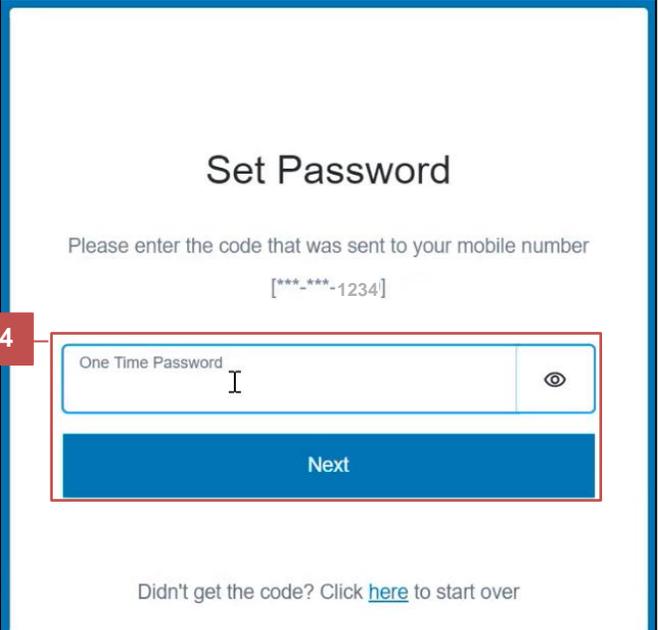


3. Select the required option to receive a one-time code for multi-factor authentication and click the **Next** button.



The screenshot shows a 'Set Password' screen with the subtitle 'Verify contact information'. Below this, there is a text prompt: 'Select a way to contact you. We will send a code to your mobile or email address:'. A red box with the number '3' highlights two radio button options: 'Send me an email [Jo*****th@gr*****om]' (which is selected) and 'Send me a text message [***-***-1234]'. Below these options is a blue 'Next' button.

4. Enter the code you received in the **One Time Password** field and click the **Next** button.



The screenshot shows the same 'Set Password' screen, but now with the subtitle 'Please enter the code that was sent to your mobile number' and a placeholder '[***-***-1234]'. A red box with the number '4' highlights a text input field labeled 'One Time Password' with a cursor inside. To the right of the input field is an eye icon. Below the input field is a blue 'Next' button. At the bottom of the screen, there is a link: 'Didn't get the code? Click [here](#) to start over'.

5. The **Set Password** dialog box is displayed.
 - a. Enter the password you wish to add to your profile in the **Password** field. Ensure that you follow the rules mentioned when you enter your password.
 - b. Enter the same password in the **Confirm Password** field.
 - c. Then, click the **Next** button.

The screenshot shows a 'Set Password' dialog box with the following elements:

- 5a**: A 'Password' input field with a cursor and a toggle icon.
- 5b**: A 'Confirm Password' input field with a toggle icon.
- 5c**: A blue 'Next' button.
- Requirements list:**
 - Must be at least 10 characters long and cannot match first name, last name or username
 - At least 1 lowercase character(s), 1 uppercase character(s), 1 digit(s), 1 special character(s)
 - Cannot contain common passwords
 - At least 4 unique character(s), cannot contain more than 2 repeated consecutive characters

6. A message appears that your password has been updated. Click the **Next** button.

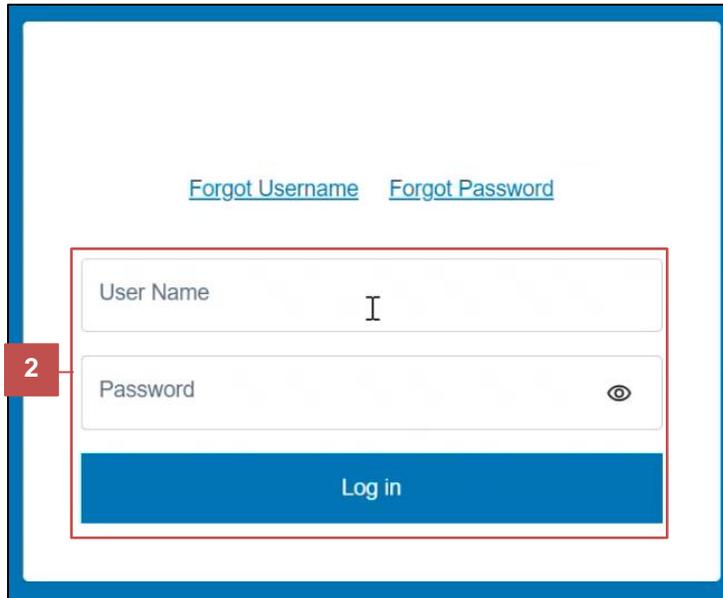
The screenshot shows the 'Set Password' dialog box with the following elements:

- 6**: A blue 'Next' button with a mouse cursor hovering over it.
- Message:** 'Your password has been updated'

Login to the Group Portal with Available Credentials

Once the password is set, you can perform the following steps to log in to the Group Portal:

1. Navigate to the Group Portal login page via <https://www.ibx.com/resources/for-employers/employer-portal> or <https://www.amerhealth.com/resources/for-employers/employer-portal.html> link.
2. Enter your **User Name** and **Password**. Then, click the **Log in** button.

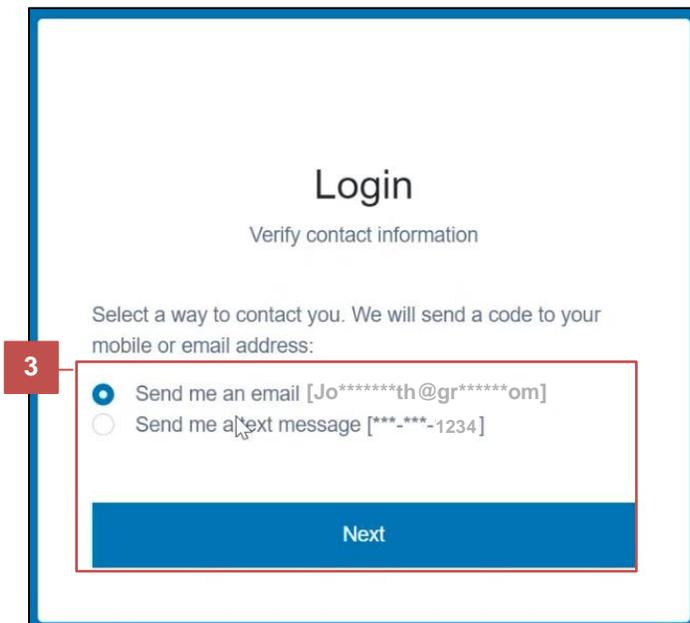


The screenshot shows the login page with the following elements:

- Links: [Forgot Username](#) and [Forgot Password](#)
- Input fields: "User Name" and "Password" (with an eye icon for visibility toggle)
- Button: "Log in"

A red box highlights the input fields and the "Log in" button. A red box with the number "2" is positioned to the left of the "Password" field, indicating the step number.

3. Select the option to receive a code for the multi-factor authentication and click the **Next** button. You will receive a code for multi-factor authentication every time you log in to the portal.

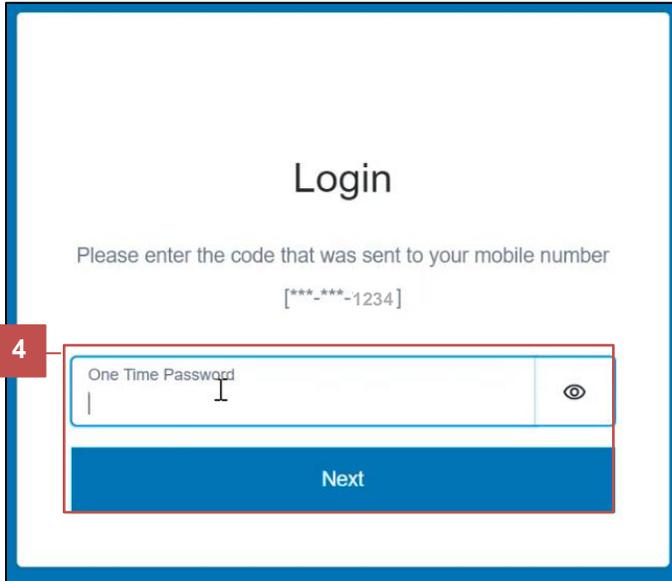


The screenshot shows the "Login" section with the following elements:

- Section: "Login"
- Text: "Verify contact information"
- Text: "Select a way to contact you. We will send a code to your mobile or email address:"
- Radio buttons:
 - Send me an email [Jo*****th@gr*****om]
 - Send me a text message [***-***-1234]
- Button: "Next"

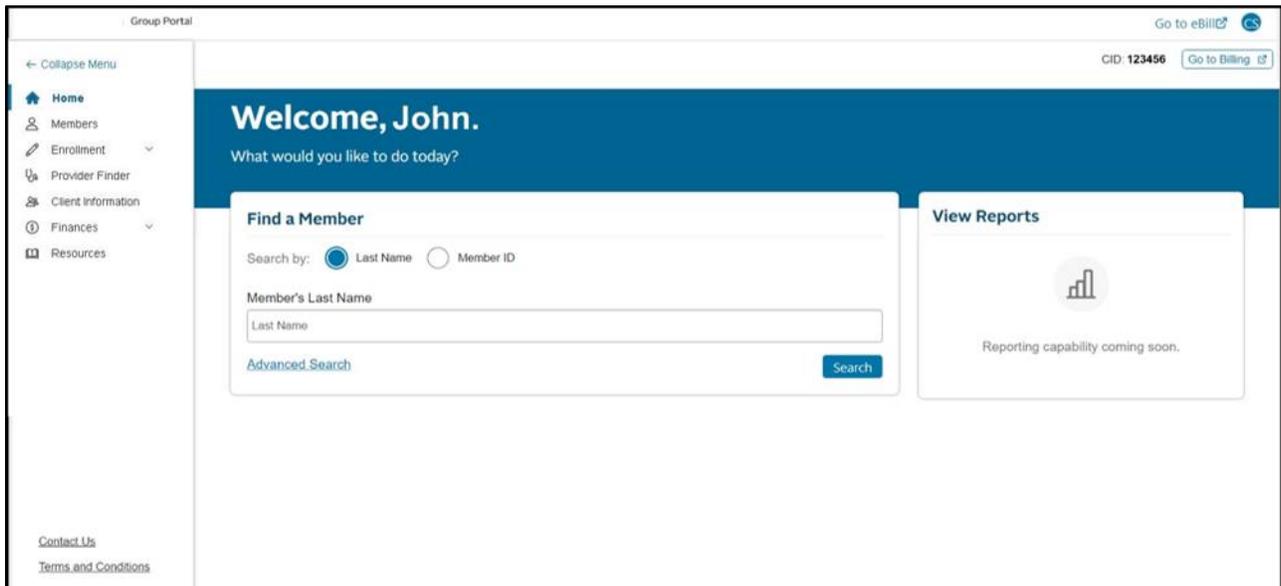
A red box highlights the radio button options and the "Next" button. A red box with the number "3" is positioned to the left of the "Send me an email" option, indicating the step number.

4. Enter the code in the **One Time Password** field and click the **Next** button.



The screenshot shows a login page with the title "Login". Below the title, it says "Please enter the code that was sent to your mobile number" followed by a placeholder "[***-***-1234]". A red box highlights a text input field labeled "One Time Password" with a cursor inside. Below the input field is a blue button labeled "Next".

5. The homepage is displayed. You have successfully logged in to the Group Portal.



The screenshot shows the Group Portal homepage. The header includes "Group Portal" on the left, "Go to eBill" and "CID: 123456" on the right, and a "Go to Billing" button. A navigation menu on the left lists: Home, Members, Enrollment, Provider Finder, Client Information, Finances, and Resources. The main content area features a blue banner with "Welcome, John." and "What would you like to do today?". Below the banner are two panels: "Find a Member" with search options for "Last Name" (selected) and "Member ID", a text input for "Member's Last Name", and a "Search" button; and "View Reports" with a bar chart icon and the text "Reporting capability coming soon." At the bottom left, there are links for "Contact Us" and "Terms and Conditions".



Users with dual maintenance can click the **Go to Employer Portal** link on the top-right of the homepage to navigate to the Employer Portal directly from the Group Portal.

Terms and Conditions

For first-time users, the **Terms and Conditions** page is displayed:

1. Read the Terms and Conditions on the page, select the **I have read the Terms and Conditions** check box and click the **Accept** button. If you click the **Decline** button, you will be logged out of Group Portal.

These Terms governing access to the Portal and use of the Applications will be governed by the laws of the Commonwealth of Pennsylvania, without regard to any conflict of laws principles.

If any part of these Terms is determined to be invalid or unenforceable pursuant to applicable law, including, but not limited to, the warranty disclaimers and liability limitations set forth above, then the invalid or unenforceable provision will be deemed superseded by a valid, enforceable provision that most closely matches the intent of the original provision and the remainder of these Terms shall continue in effect.

A printed version of these Terms and of any notice given in electronic form will be admissible in judicial or administrative proceedings based upon or relating to these Terms to the same extent and subject to the same conditions as other business documents and records originally generated and maintained in printed form.

EXHIBIT A
INDEPENDENCE BLUE CROSS, LLC
SUBSIDIARIES AND AFFILIATES

- AmeriHealth HMO, Inc.
- AmeriHealth Insurance Company of New Jersey
- HealthCare Delaware, Inc.
- Independence Assurance Company
- Independence Blue Cross, LLC
- Independence Hospital Indemnity Plan
- Keystone Health Plan East, Inc.
- QCC Insurance Company

1 Use read the entire Terms and Conditions and accept to enter the portal.

I have read the Terms and Conditions

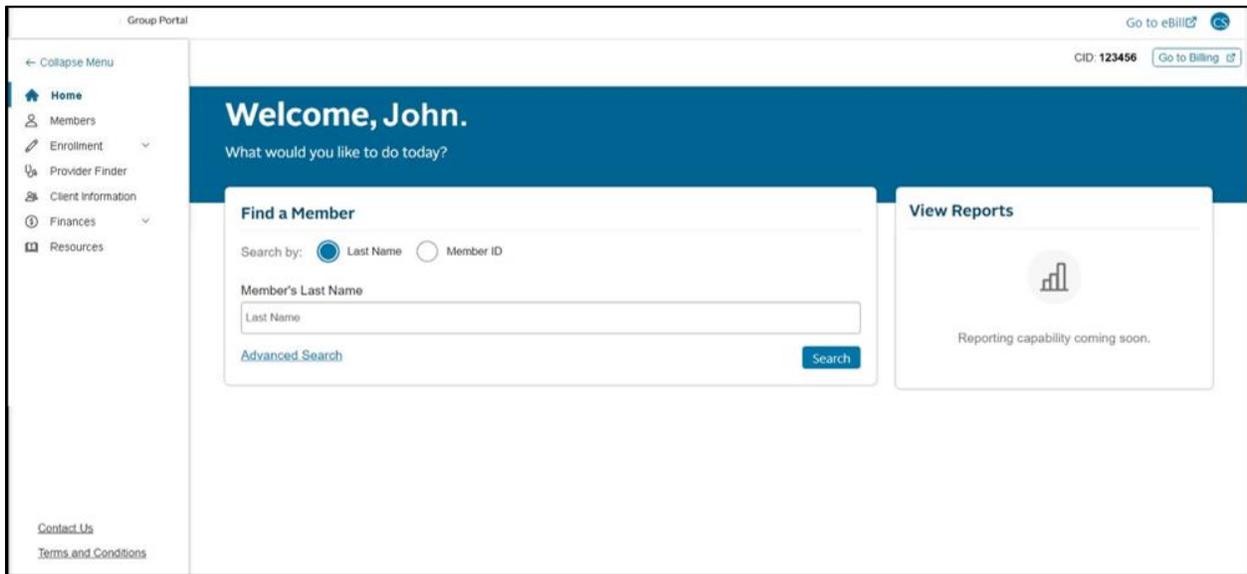


If you click the **Decline** button, you will be logged out of Group Portal.

Terms and Conditions also appear if the user has been re-activated or if there is an update to the terms and conditions.
First-time users cannot access the Group Portal unless they have accepted the terms and conditions.

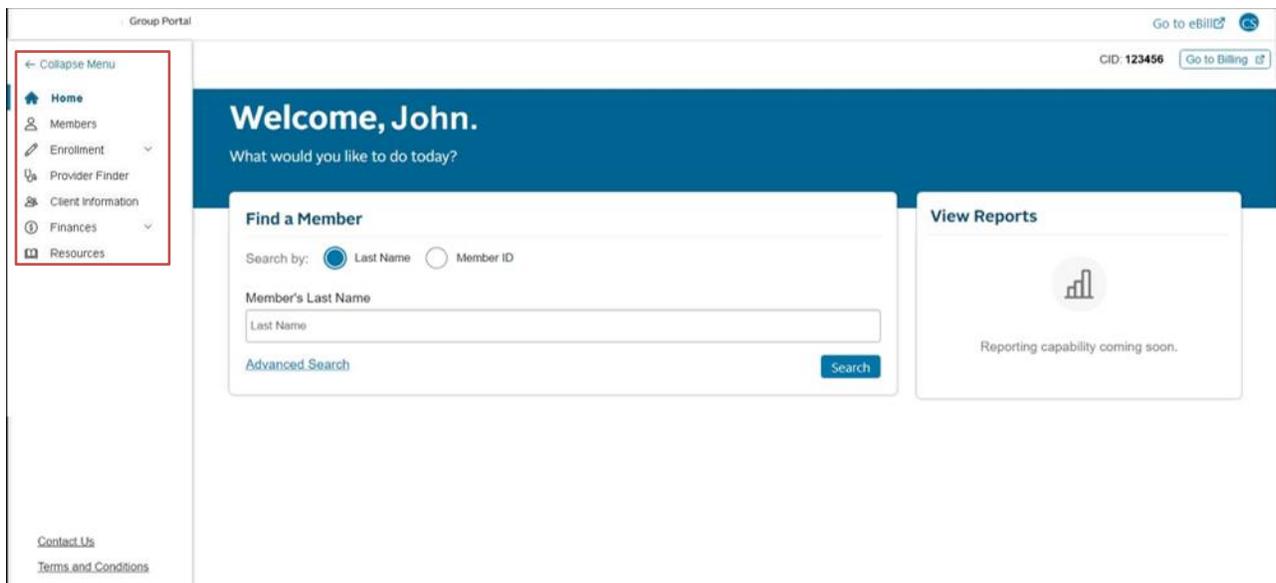
Navigation

When you log in to the Group Portal, you will see the homepage, as shown below.



Navigation Menu

The Group Portal homepage has a menu on the left that can be expanded or collapsed as required. This section will review the various options available on this menu.



Home

The Home option in the menu can be used to return to the homepage at any time. From the homepage, you can access member information, view your latest invoice and reports, and navigate to additional features. You can also use the options available on the top left of the screen to Go to Billing, raise a service request, or see various profile settings.

- To find a member or subscriber, use the Member search form on the homepage. See the [Member Search](#) section of this job aid for more details.
- To view reports, select the reports from the **View Reports** section.
- To navigate to the **EBPP** (Electronic Billing Presentment and Payment) system homepage, click the **Go to Billing** button on the top toolbar.
- To access the profile details, validate settings, log out, etc., click the **User Profile** icon on the top toolbar. It is important to note that the users who navigate to the Group Portal through MVP do not have access to edit their name or user information.
- User with dual maintenance can click the **Go To Employer Portal** link from the homepage to navigate to the Employer Portal.
- During the period of dual maintenance, that is the initial 30 days prior to renewal, the link to **Go to eBill** will not be visible. You can navigate to eBill functions by navigating to the Employer Portal using the link on the homepage.

The screenshot shows the Group Portal homepage for a user named John. The interface includes a left-hand navigation menu, a top toolbar with 'Go to eBill' and 'Go to Billing' buttons, and a main content area with a 'Welcome, John.' message and a 'What would you like to do today?' prompt. Two primary sections are highlighted: 'Find a Member' and 'View Reports'. The 'Find a Member' section contains a search form with radio buttons for 'Last Name' and 'Member ID', a text input field for the last name, and a 'Search' button. The 'View Reports' section features a bar chart icon and the text 'Reporting capability coming soon.' Red callout boxes provide instructions: 'Menu for various tools.' points to the left navigation menu; 'Form to access member information.' points to the search form; 'Shortcuts to view reports.' points to the 'View Reports' section; 'To navigate to the EBPP Portal.' points to the 'Go to Billing' button; and 'To access profile details, validate settings, logout, etc.' points to the user profile icon in the top right corner.

Members

You can use the **Members** option in the menu to search for a member associated with your entity. Refer to the "[Member Search](#)" section of this Job Aid for more information.

Enrollment

The **Enrollment** option on the menu is used to enroll new members with the **Member Enrollment** option. It opens in a new browser tab or a new window.

Home / Member Search

Member Search

Please enter in **at least one** search criteria to look up member(s).

Last Name: First Name: Social Security Number: Member ID:

Last Name First Name 000-00-0000 Member ID

Full SSN (000-00-0000) Numbers only

Add Criteria: Date of Birth Account ID Subaccount ID Status

[Reset Search](#) [Search](#)

Please enter in at least one search criteria to look up member(s).

[Click here to view a full list of all members under this client.](#)

For more on this topic, navigate to the [Member Enrollment](#) section.

Provider Finder

The **Provider Finder** option on the menu is used to navigate to the Healthsparq page to search for a provider.

Home / Provider Finder

Provider Finder

Look up physicians, hospitals, and ancillary providers.

Healthsparq Provider Search

Client Information

The **Client Information** option on the menu allows you to navigate to your entity's details page and view information such as name, status, renewal month, effective date, etc. You can also view the accounts and subaccounts related to the client under the **Account and Subaccount** section.

The screenshot displays the 'Client Information' page for a client with ID 00000000. The page is titled 'Account A' and is marked as 'Active'. The 'Account Information' section provides an overview of the account's details:

| Overview | | |
|--|--|--|
| Account Name Account A | Account ID 123456 | Service Industry Code (SIC) 1234 |
| Renewal Date 00/00/0000 | Effective Date 00/00/0000 | Termination Date N/A |
| Tax Identification Number 00 | Approximate Employee Count 100 | Eligible Employee Count 95 |

Below the overview, there is a section for 'Subaccounts (2)'. The first subaccount is 'Subaccount A' with ID 789101, which is also marked as 'Active'.

| Subaccounts (2) | | |
|--|-------------------------------------|--------------------------------|
| Name: Subaccount A ID: 789101 | | |
| Subaccount Name Subaccount A | Subaccount ID 789101 | Status Active |
| Renewal Date 00/00/0000 | Effective Date 00/00/0000 | Termination Date N/A |

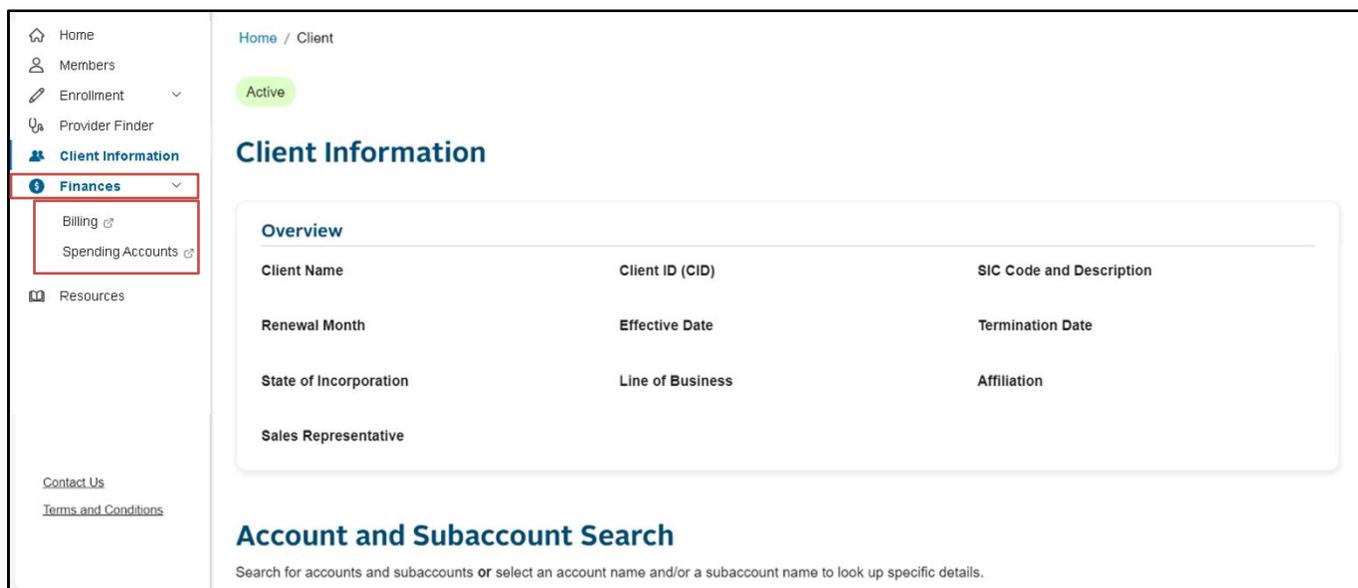
The left sidebar contains a menu with the following items: Home, Members, Enrollment, Provider Finder, **Client Information** (highlighted), Finances, and Resources. At the bottom of the sidebar, there are links for 'Contact Us' and 'Terms and Conditions'. The top right of the page shows the client name, CID: 00000000, and a 'Go to Billing' button.

Finances

The **Finances** option on the menu includes the Billing and Spending Accounts sub-options. You can click on these options to open the Billing or Spending Account related pages in the Electronic Billing Presentment and Payment (EBPP) system.

From the **Billing** link, you will be taken to the EBPP homepage, where you can experience a streamlined payment process with increased operational efficiency, enhancing your overall portal experience. To learn more about these topics, refer to the **EBPP User Guide** from the **Resources**.

The **Spending Accounts** link will direct you to the **Spending Accounts** home page.

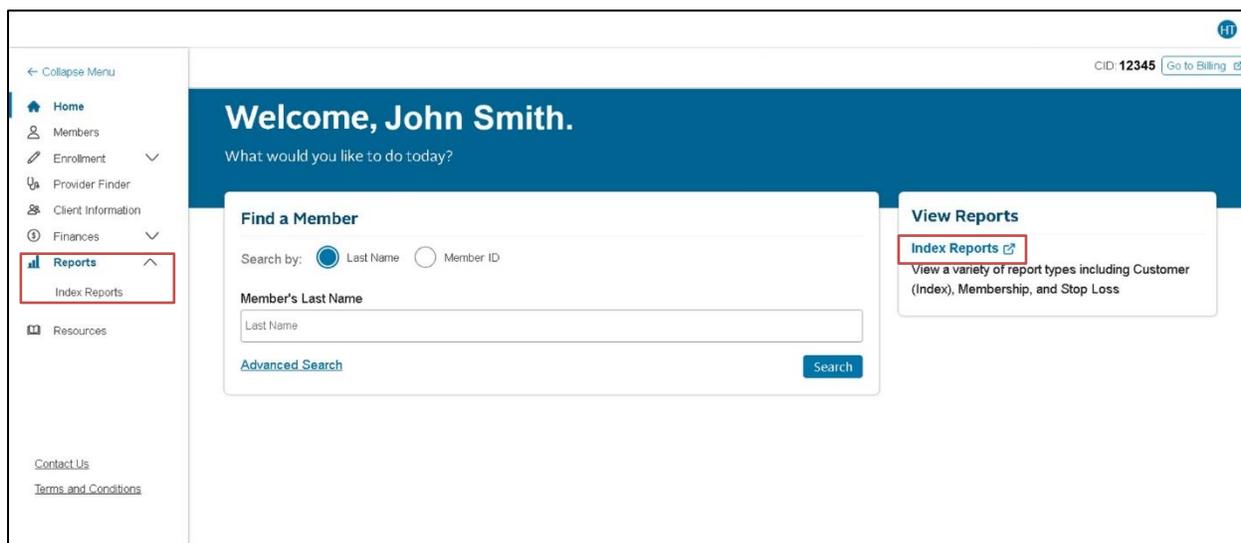


The screenshot shows the 'Client Information' page. On the left is a navigation menu with 'Finances' expanded to show 'Billing' and 'Spending Accounts'. The main content area has a breadcrumb 'Home / Client' and an 'Active' status indicator. Below is the 'Client Information' section with an 'Overview' table. The table has three columns: Client Name, Client ID (CID), and SIC Code and Description. Other rows include Renewal Month, Effective Date, Termination Date, State of Incorporation, Line of Business, Affiliation, and Sales Representative. At the bottom is an 'Account and Subaccount Search' section with a search prompt.

| Client Name | Client ID (CID) | SIC Code and Description |
|------------------------|------------------|--------------------------|
| Renewal Month | Effective Date | Termination Date |
| State of Incorporation | Line of Business | Affiliation |
| Sales Representative | | |

Reports

The **Reports** option on the menu includes the link to **Index Reports**. You can use this link to access the reports available to you. Alternatively, you can access **Index Reports** using the link available under the **View Reports** section.



The screenshot shows the 'Reports' page. The navigation menu on the left has 'Reports' expanded to show 'Index Reports'. The main content area features a 'Welcome, John Smith.' banner with a 'Go to Billing' link. Below the banner is a 'Find a Member' search box with radio buttons for 'Last Name' (selected) and 'Member ID'. There is a text input for 'Member's Last Name' and a 'Search' button. To the right is a 'View Reports' section with a link to 'Index Reports' and a description: 'View a variety of report types including Customer (Index), Membership, and Stop Loss'.

Resources

The **Resources** option allows you to navigate to the **Resources** page and view different links and documents such as applications, forms, or anything that relevant to your group portal experience.

Home

Members

Enrollment

Provider Finder

Client Information

Finances

Resources

Resources

Your one-stop shop for helpful information, forms, and reference materials.

Links and Documents

Viewing 1

[Group Portal User Guide](#)

Explore this article to understand Group Portal and get the overview of the exciting features.

Updated: 06/01/2024

[Contact Us](#)

[Terms and Conditions](#)



The links or documents under this page open in a new tab or browser window. If the browser does not support the type of the document, it will automatically be downloaded.

Key Activities

Here are some key activities that you can perform using the Group Portal:

- [Search for a member or subscriber.](#)
- [Search for account\(s\) or sub-account \(s\).](#)
- [Access Index Report.](#)
- [Add or Change PCP.](#)

Let's look at these activities in detail:

Search for a Member or Subscriber

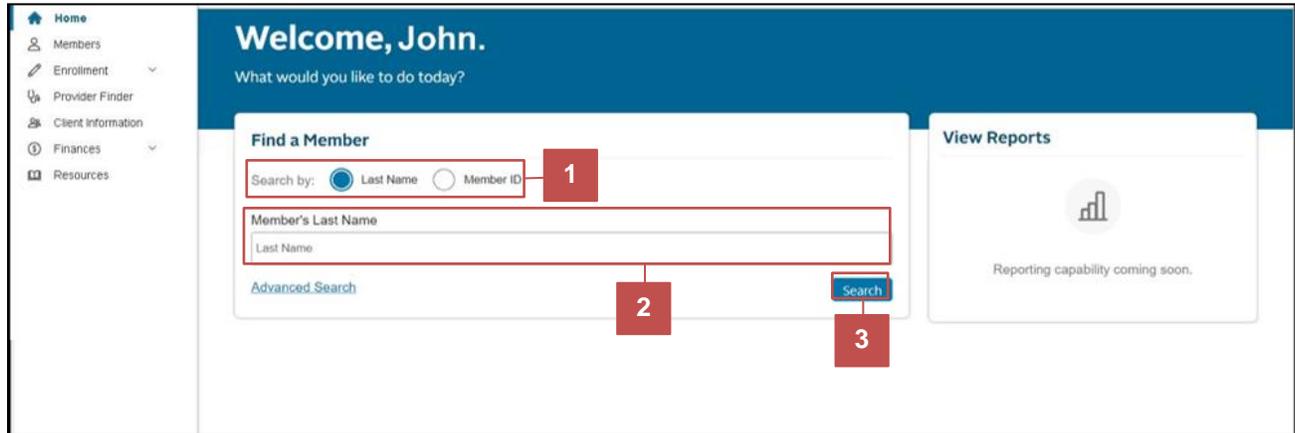
To search for a member or subscriber, click the **Members** option from the menu and perform the following steps:

1. On the **Member Search** page, enter the information of the member or subscriber to search for in a minimum of one field.
Note: If you enter the information of the member or subscriber to search for in more than one field, the results will be from the **and** operation.
2. Click the **Search** button.
3. To clear the fields, click the **Reset Search** button.

OR

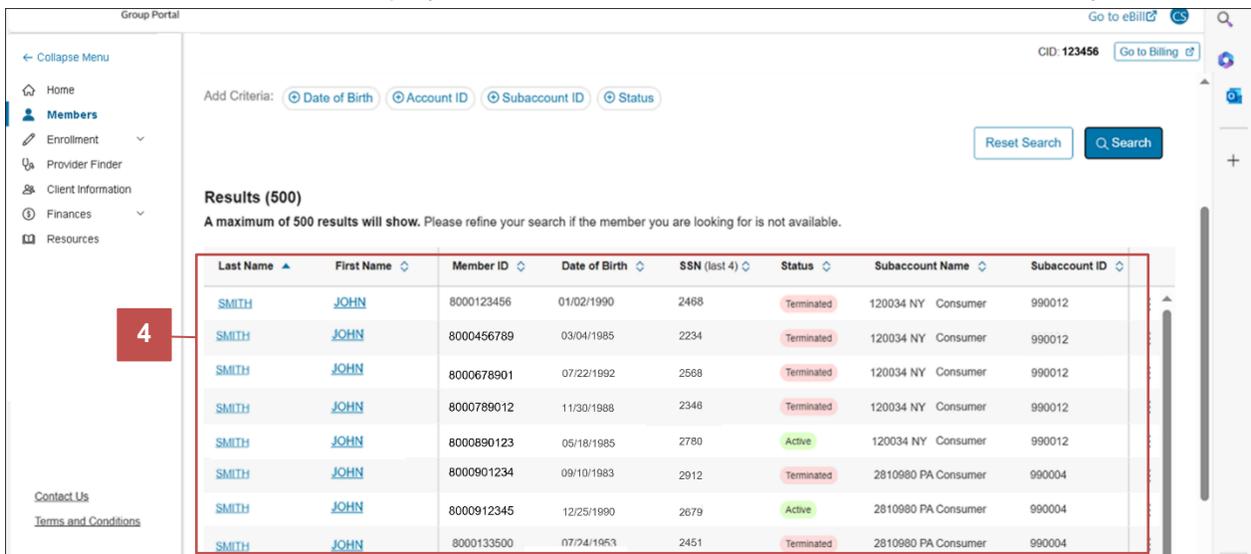
Member Search is also available through the homepage. To perform a member search from the homepage, follow these steps:

1. Select the required search criteria. You can either search by **Last Name** or **Member ID**.
2. Enter the relevant value to search with. You may click the **Advanced Search** option for additional search criteria.
3. Click the **Search** button.



You may click the **Advanced Search** option for additional search criteria. You can enter details in one or more fields for advanced search results. It is also possible to add more search criteria by selecting the required criteria from the **Add Criteria** section. However, the fields **Last Name**, **First Name**, **Social Security Number**, and **Member ID** are always visible on the **Member Search** page. You can sort the columns as required to search for the required member.

4. The search results are displayed under the **Results** section. Select the member you want.





Each result has a menu with options: **Update Member**, **View/Request ID Cards**, and **View Benefit Documents**. These are shortcut options that the user can click to move directly to perform the desired action.

You can click the **Update Member** option to access the **Member Enrollment** and update the member information. For more information, navigate to the [Member Enrollment](#) section.

5. The **Member Information** page is displayed. You can click the **Details**, **ID Card**, **Plan & Benefits**, or **Primary Care** tab to view the required information.

| Personal Information | |
|------------------------|-------------------------|
| Legal Name | John Smith |
| Date of Birth | 01/02/1990 |
| Member ID | 8000123456 |
| Email Address | johnsmith@johnsmith.com |
| Social Security Number | *** - ** - 1234 |
| Mobile Phone Number | |
| Gender | Male |
| Home Phone Number | 261-252-7534 |

Family Members
This subscriber does not have any dependents.



You can click the **Family Members** drop-down button to view the dependents added for the member and click the family member's name to view the dependent's profile. If there are no dependents added, this drop-down button does not appear.

You can perform the following activities from the **ID Card** tab of the **Member Information** page:

- [Email Card\(s\)](#)
- [Print Card\(s\)](#)



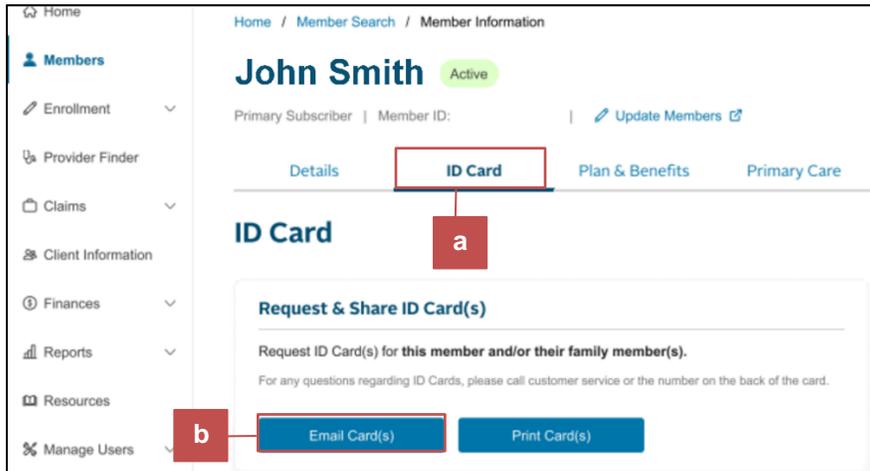
You can also click the **View/Request ID Cards** option from the menu on the result page to navigate to the ID card tab and perform these activities.

Let's look at the details below:

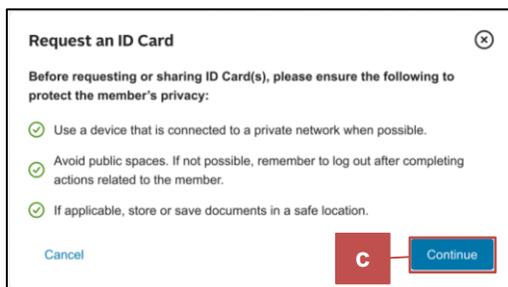
- **Email Card(s)**

To email the ID card, perform the following steps:

- a. Navigate to the **ID Card** tab.
- b. Click the **Email Card(s)** button.

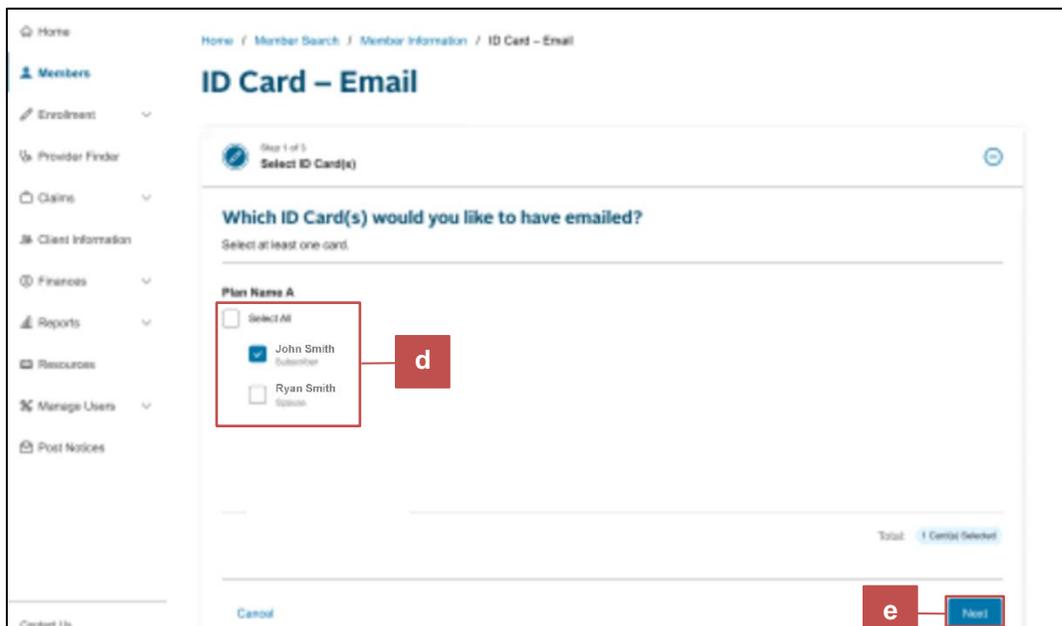


- c. The **Request an ID Card** dialog box is displayed. Click the **Continue** button to move forward.



- d. Select the subscriber that you want the ID card emailed to.

- e. Click the **Next** button.



- f. If there is an email address on file, it will be selected by default to send the ID Card. If there is no email address on file, the system will ask for a temporary email.
- g. Click the **Next** button.

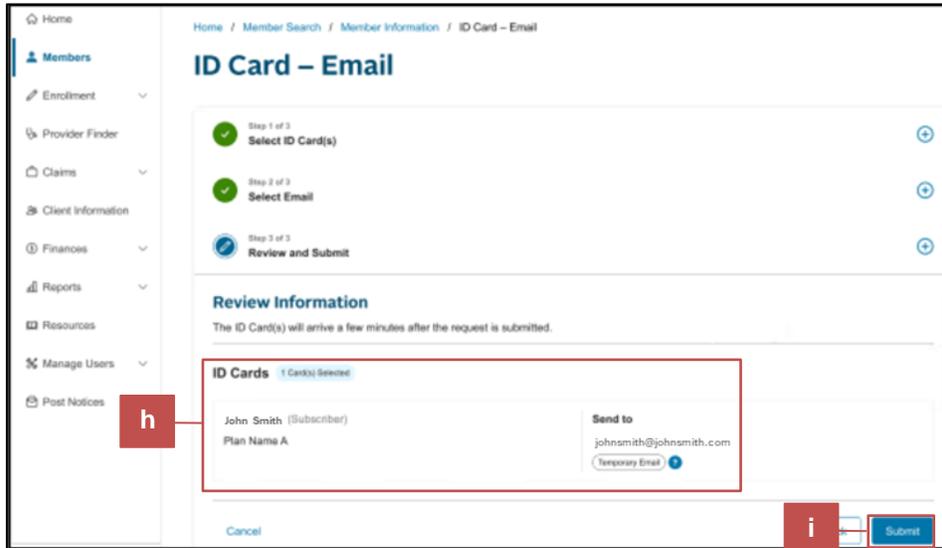
The screenshot shows a web application interface for 'ID Card - Email'. The breadcrumb trail is 'Home / Member Search / Member Information / ID Card - Email'. The page title is 'ID Card - Email'. There are two steps: 'Step 1 of 3: Select ID Card(s)' (completed) and 'Step 2 of 3: Select Email' (current). The question is 'Where would you like the ID Card(s) emailed?' with the instruction 'Select one email address. The default is the email the subscriber has on file.' A dropdown menu is open, showing 'John Smith johnsmith@johnsmith.com' selected. A red box labeled 'f' highlights the dropdown menu. Below the dropdown is a link 'Use a Temporary Email'. At the bottom right, there are 'Back' and 'Next' buttons. A red box labeled 'g' highlights the 'Next' button.

You can also click the **Use a Temporary Email** link to add the temporary email to share the ID card. Proceed to enter the information as required on the **Use a Temporary Email** then, click the **Add** button.

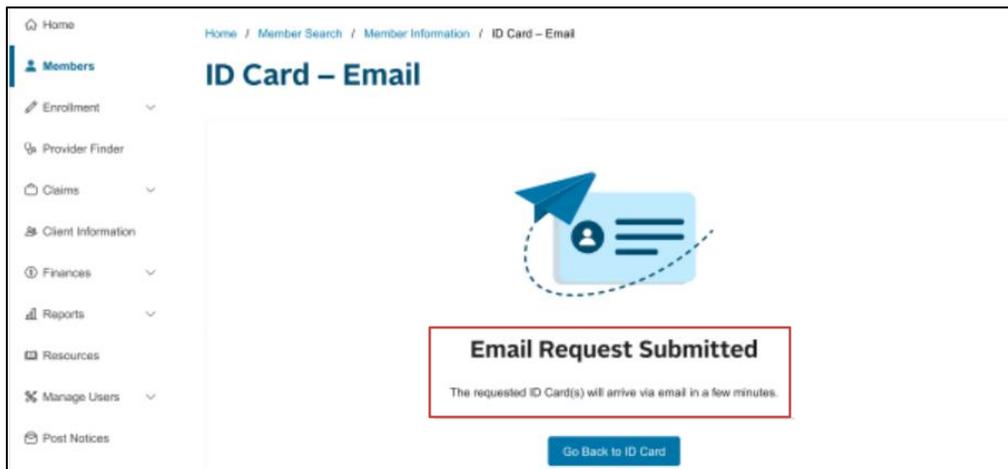


The screenshot shows a form titled 'Use a Temporary Email'. The text above the form reads: 'Entering a temporary email address will not change or add the member's email on file. The temporary email address will be saved for auditing purposes of this one-time request, but it will not be stored on this website.' The form has four input fields: 'First Name', 'Last Name', 'Email Address', and 'Confirm Email Address'. Below the fields is a checkbox with the text: 'I confirm this email has been entered accurately and will be sent to the correct contact specified. I acknowledge that sending ID Card(s) to an incorrect contact can result in a HIPAA violation.' At the bottom right, there is an 'Add' button highlighted with a red box and a 'Cancel' button.

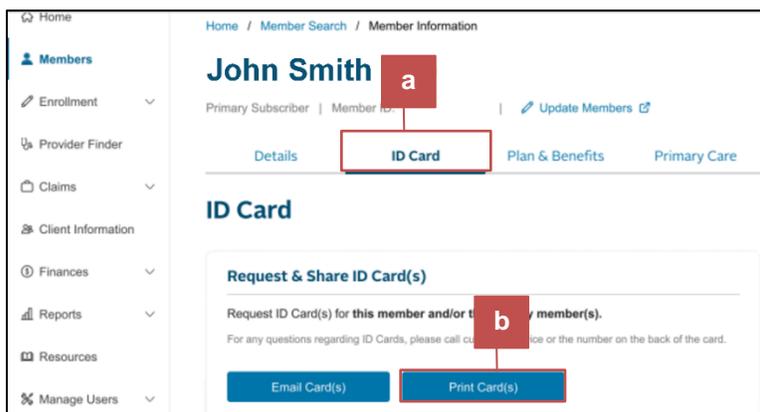
- h. Review the information provided.
- i. Then, click the **Submit** button.



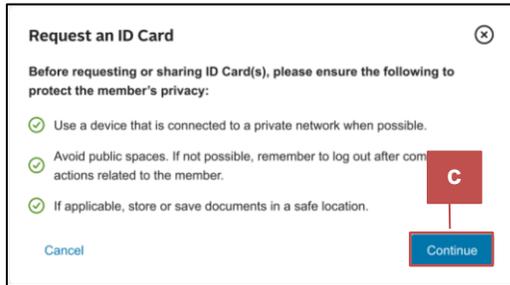
A message is displayed that the email request is submitted.



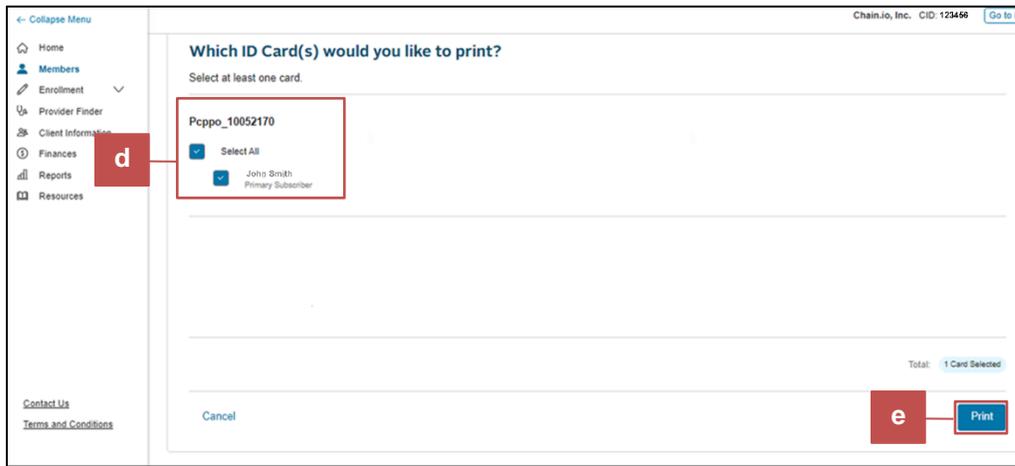
- **Print Card(s)**
To print the ID card by mail, perform the following steps:
 - a. Click the **ID Card** tab.
 - b. Click the **Print Card(s)** button.



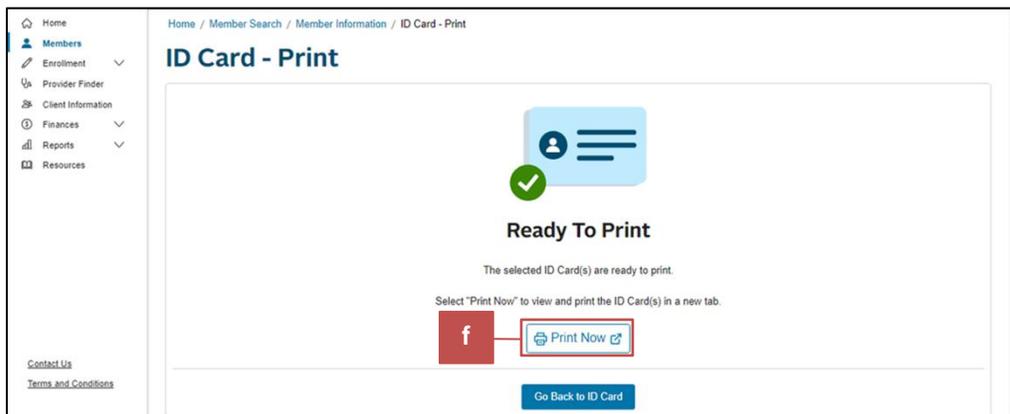
- c. The **Request an ID Card** dialog box is displayed. Review the information and then click the **Continue** button to move forward.



- d. Select the subscriber that you want to print the ID card of.
e. Then, click the **Print** button.



- f. A message is displayed that the ID card is ready to print. Click the **Print Now** button.



- **To view the plan and benefits that the member is enrolled in:**
Click the **Plan & Benefits** tab.

You will see a list of Plans the member is enrolled in. Select the relevant plan to view the plan details.

To see a list of covered members and coverage details associated with the selected plan, click the **See Covered Members** or the **See Coverage History** link.

All the benefit documents like SBCs and Benefit Highlights are available and listed under the **Benefits Documents** section on this tab. Click the relevant document to view.



You can click the **View Benefits Documents** option from the menu on the result page to navigate to this page.

- **To view the PCP details of the member:**
Click the **Primary Care** tab. You can only view the details on this page. To update the details, access the [Member Enrollment](#).

Search for Account(s) or Subaccount(s)

To search for a client's account or subaccount, click the **Client Information** option from the menu, scroll down to view the account and sub-account details, and perform the following steps:

1. Enter the required information in the fields under the **Account and Subaccount Search** section.
2. Click the **Search** button.
3. Click the **Reset Search** button if you need to reset the search results.

The screenshot displays the 'Client Information' page for a client named 'Client Name' (CID: 00000000). The page includes a navigation menu on the left with options like Home, Members, Enrollment, Provider Finder, Client Information (selected), Finances, and Resources. The main content area shows an 'Overview' section with client details and an 'Account and Subaccount Search' section. The search section contains four input fields: 'Account ID', 'Subaccount ID', 'Effective Date', and 'Termination Date'. A red box highlights these fields, with a red square containing the number '1' pointing to the 'Account ID' field. Below the search fields are two buttons: 'Reset Search' (with a red square containing the number '3' pointing to it) and 'Search' (with a red square containing the number '2' pointing to it).

| Overview | | |
|---|---|---|
| Client Name Client Name | Client ID (CID) 00000000 | SIC Code and Description 00 - Sample Code |
| Renewal Month Month | Effective Date 00/00/0000 | Termination Date N/A |
| State of Incorporation None | Line of Business Line of Business | Affiliation N/A |
| Sales Representative John Doe | | |

Account and Subaccount Search

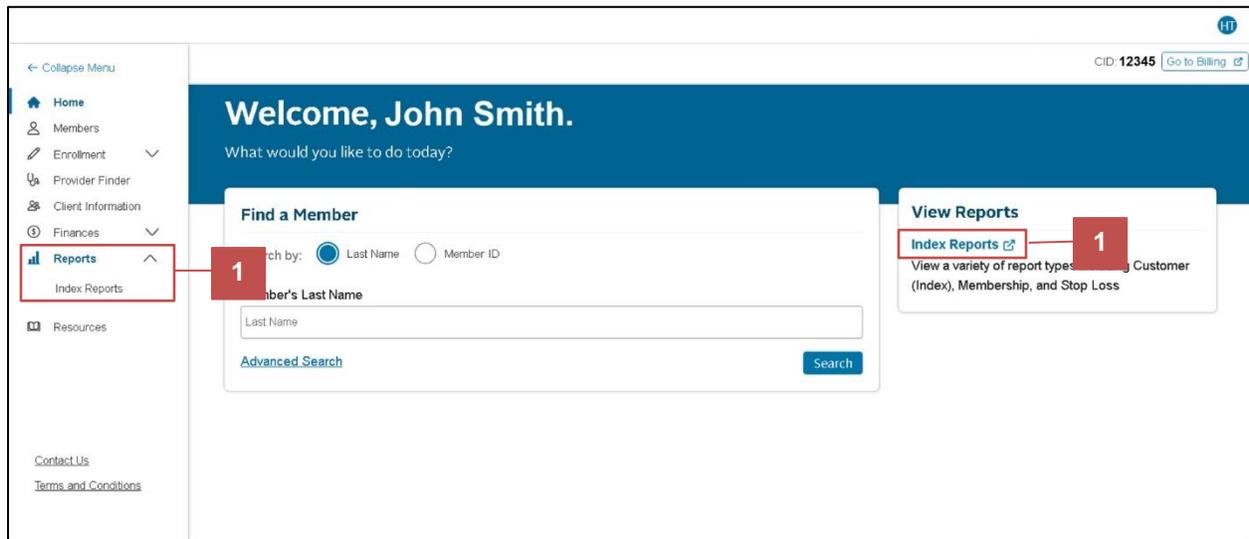
Search for accounts and subaccounts or select an account name and/or a subaccount name to look up specific details.

| Account ID | Subaccount ID | Effective Date | Termination Date |
|---|--|---|---|
| <input type="text" value="Account ID"/> | <input type="text" value="Subaccount ID"/> | <input type="text" value="MM / DD / YYYY"/> | <input type="text" value="MM / DD / YYYY"/> |

Access Index Report

To access index reports, perform the following steps:

1. Click the **Reports** option from the menu and select the **Index** sub-option.
You can also click the **Index Reports** link from the **View Reports** section to navigate to Index.



2. The **Index** homepage will be displayed in a new window.
 - a. Click the **Report Center** drop-down.
 - b. select the required report from the drop-down menu.



The list of reports available to you in Index will depend on your role and type of products. Based on the report type you select you will be further prompted to provide additional inputs to submit the report.

- Once you have submitted a report to be generated, click the **Output Manager** tab to view and download the same.

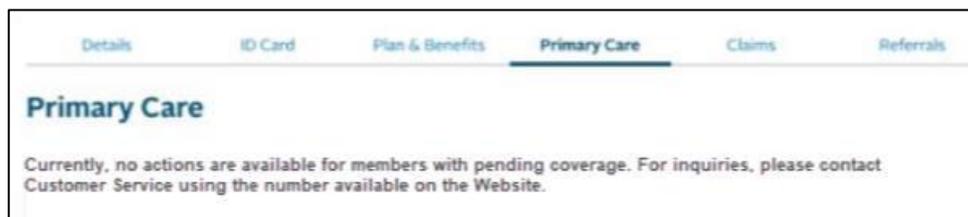


Add or Change PCP

Users can update an active member's PCP directly without navigating to Member Enrollment. For active members, updates can be backdated up to 30 days from the current date. Adding or changing the PCP will trigger a new Member ID card to generate if the plan requires a PCP on the ID Card.



Users can not update the pending and terminated members' PCP through Group Portal. The following message is displayed:



Updates are synchronized across all platforms, ensuring the latest information is always reflected.

Below are the steps to change or add PCP.

1. In the **Members** page, click the **Primary Care** tab.

The screenshot shows the 'Member Information' page for John Smith. The left sidebar contains navigation options: Home, Members (highlighted with a red box), Enrollment, Provider Finder, Client Information, Finances, Reports, and Resources. The main content area has a breadcrumb trail 'Home / Member Search / Member Information' and the member's name 'John Smith' with an 'Active' status. Below the name are tabs for 'Details', 'ID Card', 'Plan & Benefits', and 'Primary Care' (highlighted with a red box and a red '1' callout). The 'Member Details' section includes 'Personal Information' (Legal Name: John Smith, Date of Birth: 01/02/1990, Member ID: 800123456) and 'Family Members' (This subscriber does not have any dependents).

2. Click the **Add PCP** button to add the PCP.

The screenshot shows the 'Primary Care' page for John Smith. The left sidebar is the same as in the previous screenshot. The main content area has a breadcrumb trail 'Home / Member Search / Member Information' and the member's name 'John Smith' with an 'Active' status. Below the name are tabs for 'Details', 'ID Card', 'Plan & Benefits', and 'Primary Care' (highlighted with a red box and a red '2' callout). The 'Primary Care' section has a heading 'None Selected' and the text 'No Primary Care Physician selected.' Below this text is a blue 'Add PCP' button (highlighted with a red box and a red '2' callout).



For active members, the **Add PCP** button is enabled only when medical coverage is available.



If there are existing PCP details added, a **Change PCP** button is displayed. Click the **Change PCP** button to add the PCP details. This is the only location where a Group Portal user can change an existing PCP.

3. The **Update Primary Care Physician** form is displayed. Click the **Provider Finder** button.

Details ID Card Plan & Benefits **Primary Care**

Primary Care

The current effective selection is shown. For any changes, please note processing delays may occur.

None Selected

No Primary Care Physician selected.

Update Primary Care Physician

Provider Finder Search for a Primary Care Physician and locate the PCP ID ([PCP Update Guide](#))

PCP ID **Provider Name**
(Enter and confirm PCP ID to load the Provider's name)

Effective Date

MM / DD / YYYY

You can click the **PCP Update Guide** link for instructions and information regarding the input form.



Search for a Primary Care Physician and locate the PCP ID ([PCP Update Guide](#))

4. The **Healthspaq** page will open in a new tab. Based on the member's zip code, the Healthspaq tool will refine the list of PCPs to those providers within a 15-mile radius. Scroll through the list and copy the PCP ID of your preferred provider.

Dashboard / Doctors by Specialty / **Primary Care Physician** LOCATION Philadelphia, PA 19116 PLAN Keystone HMO Proactive

Accepting New Patients 25 miles Filters Tiers Map

4214 search results

Richie Rich, MD
Pediatrics Location

ABC321 Health Pediatrics LLC, 12345 ABC Street, Suite 123, ABC Town, PA 19116 • 1.2 miles

Offers video visits Primary care provider Accepting some new patients at location

Specialties: Pediatrics
Areas of focus: None
Office hours: [Open Today - 8:00AM-3:00PM](#)
Quality: **Total Care**
Contact: Main: (321) 123 - 321, Web contact: None, [+ 2 more](#)

PCP ID: **001002003**

Tier 1 - Preferred [More details](#)

Compare

5. Return to the **Primary Care** tab in the Group Portal and perform the following steps:
 - a. Enter the PCP ID in the **PCP ID** field.
 - b. Click the **Confirm** button.

Details ID Card Plan & Benefits **Primary Care**

Primary Care

The current effective selection is shown. For any changes, please note processing delays may occur.

None Selected

No Primary Care Physician selected.

Update Primary Care Physician

[Provider Finder](#) Search for a Primary Care Physician and locate the PCP ID ([PCP Update Guide](#))

5a **5b**

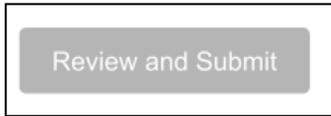
Provider Name
(Enter and confirm PCP ID to load the Provider's name)

Effective Date

MM/DD/YYYY

[Cancel](#)

After clicking the **Confirm** button, the **Review and Submit** button will be enabled only when the PCP ID is validated by the backend system.



6. Once the **Confirm** button is clicked, the **Provider Name** section is auto populated with the name of the provider.

[Provider Finder](#) Search for a Primary Care Physician and locate the PCP ID ([PCP Update Guide](#))

6

Provider Name
Richie Rich ✓

Effective Date

MM/DD/YYYY

[Cancel](#)

7. Click the **Effective Date** field, to enter a relevant date.

[Provider Finder](#) Search for a Primary Care Physician and locate the PCP ID ([PCP Update Guide](#))

PCP ID Provider Name **Richie Rich** ✓

Effective Date **7**

MM / DD / YYYY



The Effective Date will default to the current date and can only be entered if the member has active medical coverage.



When updating a PCP, always verify if the new PCP is listed on the member's ID card. If the new PCP is not displayed on the current ID card, users should request a new ID card to ensure the member's records are up-to-date.

8. Click the **Review and Submit** button to submit the updates.

Effective Date

MM / DD / YYYY

8

9. The **Review and Submit** pop-up window is displayed with the **Current** and **New** sections displaying the current PCP and the newly selected PCP respectively: Click the **Submit** button to confirm the submission.

Review and Submit

Selected Member: John Smith

| CURRENT | NEW |
|-----------------|-------------------------------------|
| No PCP Selected | Provider Name Richie Rich |
| | PCP ID 001002003 |
| | Effective Date 12/06/2024 |

[Cancel](#) 9 [Submit](#)



Click the **Cancel** button to go back and make changes.

10. A pop-up box is displayed, that the member's PCP has been updated. Click the **Close** button to close the pop-up box.



The member's PCP has been updated.

It may take up to a few hours for changes to reflect in the portal.

10

[Close](#)



After updating the PCP, changes may not immediately appear on the Group Portal. Although the update processes in the backend, users might not see it reflected until they log out and log back into the system. Typically, the changes become visible within one day, though in some cases, it can happen within four to five hours. Logging back in helps ensure that users see the latest updates.

Member Enrollment

Users can navigate to the **Member Enrollment** from the Group Portal. This allows the user to enroll new members, add subscribers or dependents, edit, or cancel coverage, and change PCP.



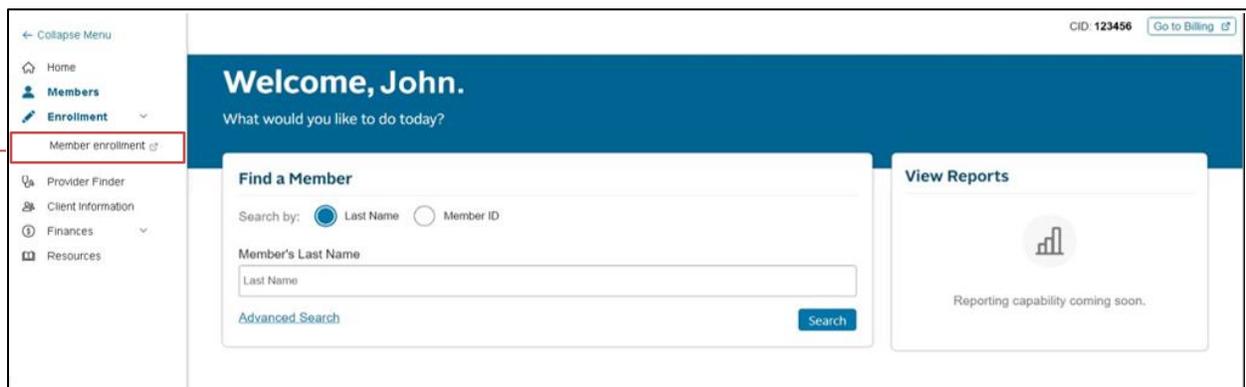
Member enrollment activities take 48 hours to reflect in Group Portal.



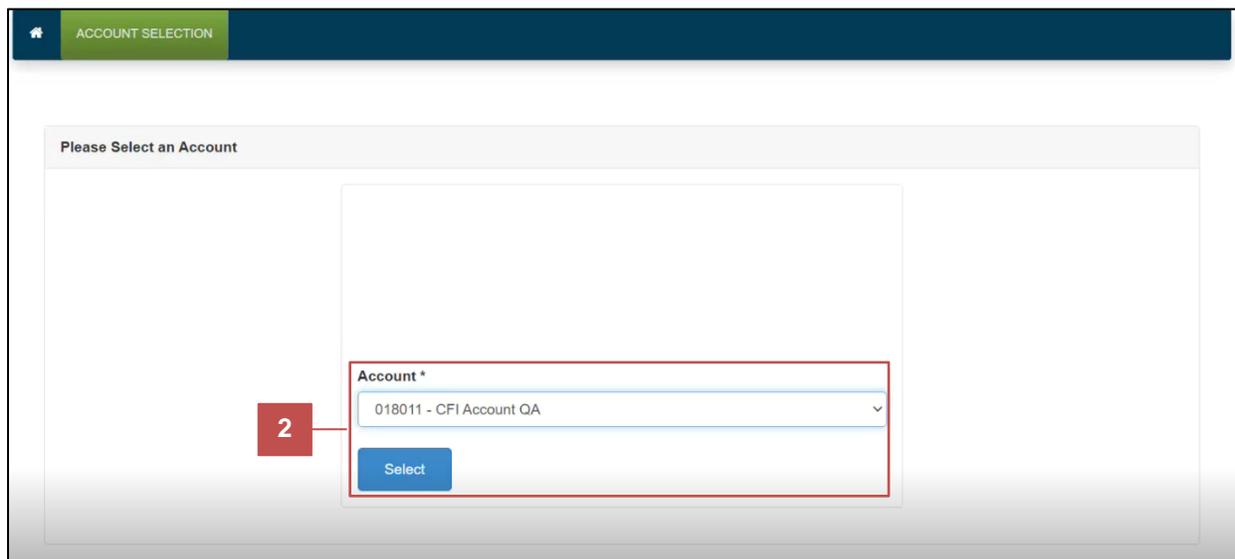
If you are an EDI customer, it is your responsibility to ensure records are aligned between updates using the Member Enrollment tool in the Group Portal and your EDI files.

To enroll new members, perform the following steps:

1. Click the **Member Enrollment** sub-option under the **Enrollment** option on the menu, the **Member Enrollment** page will open in a new browser or window.



2. Select the relevant account from the **Account** field drop-down menu and click the **Select** button.





Only the users with multiple accounts will navigate to the **ACCOUNT SELECTION** page to select the required account. Users with just one account will navigate directly to the **SEARCH MEMBERS** page.

Add Subscriber and Dependents

To add a new subscriber or dependent, perform the following steps:

1. The **Homepage** section is displayed. Click the **Add Transaction** tab.

The screenshot shows the 'ADD TRANSACTION' tab selected in the navigation bar. Below it is a 'Search Criteria' form with the following fields:

- First Name:
- Last Name:
- Member ID:
- Status: Active Inactive Both
- Sub Account:
- SSN/TIN:
- Date of Birth:
- Member Type: Employee Dependent Both
- Alternate ID:
- Search:

2. The **Add transaction** page is displayed. Enter the details in the fields in the **Employee** section.
Click the **Next** button at the bottom of the page, once all the mandatory fields are populated, navigate to the **Dependents** section.

The screenshot shows the 'Employee' section of the 'Add transaction' page. The page has tabs for Employee, Dependents, Coverage, COB, Primary Care, Review, and Confirmation. The 'Employee' tab is active. The form includes the following sections:

- Effective Date and Account**
 - Effective Date *:
 - Select Sub Account *:
 - Check If COBRA Participant
- Name and Demographics**
 - Prefix:
 - First Name *:
 - Middle Initial:
 - Last Name *:
 - Suffix:
 - Gender *: Male Female Unknown
 - SSN:
 - Confirm SSN:
 - Date Of Birth *:
 - Payroll Location:
 - Hire Date *:



The fields with an asterisk (*) are mandatory.
 The date entered in the **Effective Date** field must always be later than the date entered in the **Hire Date** field.
 You can click the **Cancel Transaction** button at any point or section and the entire transaction will be canceled.

3. The **Dependents** section is displayed. It is not mandatory to add a dependent. However, if you wish to add a dependent, click the **Add dependent** button to add a dependent for the subscriber added in the previous section.
4. The **ME – Add dependent** dialog box is displayed. Enter the information in the mandatory fields (and other fields, as required) and click the **Add** button. **Child** dependents must be under the age of 26. There is no age limit to add a **Spouse** dependent.
5. Click the **Next** button to navigate to the **Coverage** section.

| First Name | Last Name | Relationship | Gender | SSN | DoB | |
|------------|-----------|--------------|--------|-------------|------------|-------------|
| Sharon | Smith | Spouse | Female | ***-**-8899 | 1990-09-09 | Edit Delete |
| Emily | Smith | Child | Female | ***-**-8900 | 2021-12-01 | Edit Delete |

ME - Add Dependent

Add Member Information

Prefix First Name * Middle Initial Last Name *

Suffix Gender * Male Female Unknown SSN Confirm SSN

Date Of Birth * Relation *

Smoking Status * Last Regular Use Date *

Address **Contact Info**

Same as Employee

Address * Address 2

City * State * Zip * Country *

County

4



You can uncheck the **Same as employee** checkbox under the **Address sub-section** if the address of the dependent is different from the employee and add a new address.

You can click the **Back** button to go to the previous section and edit the details.

You can click the **Edit** button to edit the information of the dependent entered or the **Delete** button to delete the dependent entered and add a new dependent.

- The **Coverage** section is displayed. Based on the sub-account selected in the **Employee** section, the benefits packages for the subscriber and the dependents are displayed. Select the required package(s) and click the **Next** button to navigate to the **COB** section.

Employee - Cameron L Stevens

Medical: Select Plan

Prescription: Select Plan

Vision: Select Plan

Dental: Select Plan

Child - Jasmine Smith

Same as Employee

Back Cancel Transaction **6** Next

- The **COB**, or Coordination of Benefits, section is displayed. In this section, you can add the employee's other insurance, benefits, or Medicare that they may be enrolled in other than the benefits provided by our company. Select the **Yes** option and then click the **Add Medicare** or **Add Other Insurance** button to add the details.

Employee Dependents Coverage **COB** Primary Care Review Confirmation

Is the employee, or any other member on this policy, covered by another medical or dental insurance, or Medicare? *

Yes No

Add Other Insurance **7** Add Medicare

COB Coverages

| Policy Type | Insurance Name | Policy Holders | Members Covered |
|-------------|----------------|----------------|-----------------|
|-------------|----------------|----------------|-----------------|

Back Cancel Transaction Next



If you select the **No** option, click the **Next** button to move to the next step.

8. The **ME – Add COB** dialog box is displayed. Enter the details as required and click the **Add** button.

ME - Add COB

Add COB Non Medicare Information

Is the Policy Holder on this plan?
 Yes No

Select Policy Holder *
[Dropdown]

Policy Holder Relation to Subscriber *
[Dropdown]

First Name *
[Text Box]

Middle Initial
[Text Box]

Last Name *
[Text Box]

Policy Holder Birth Date *
mm/dd/yyyy [Calendar Icon]

Policy # *
[Text Box]

Group Number
[Text Box]

Policy Effective Date *
mm/dd/yyyy [Calendar Icon]

If Cancelled, Policy Term Date
mm/dd/yyyy [Calendar Icon]

What type of policy is this?
[Dropdown]

Type(s) of Coverage *
[Text Box]

Member(s) covered by this insurance *
 John Smith
 Emily Smith

Is the Policy Holder? *
[Dropdown]

Is there a court order specifying a person(s) to maintain health coverage for any of your dependents? *
 Yes No

Other Insurance Carrier Information [Employer Information](#)

Insurance Carrier Name
[Text Box]

Insurance Carrier Phone Number
000-000-0000 [Text Box]

Address
[Text Box]

Address 2
[Text Box]

City
[Text Box]

State
[Dropdown]

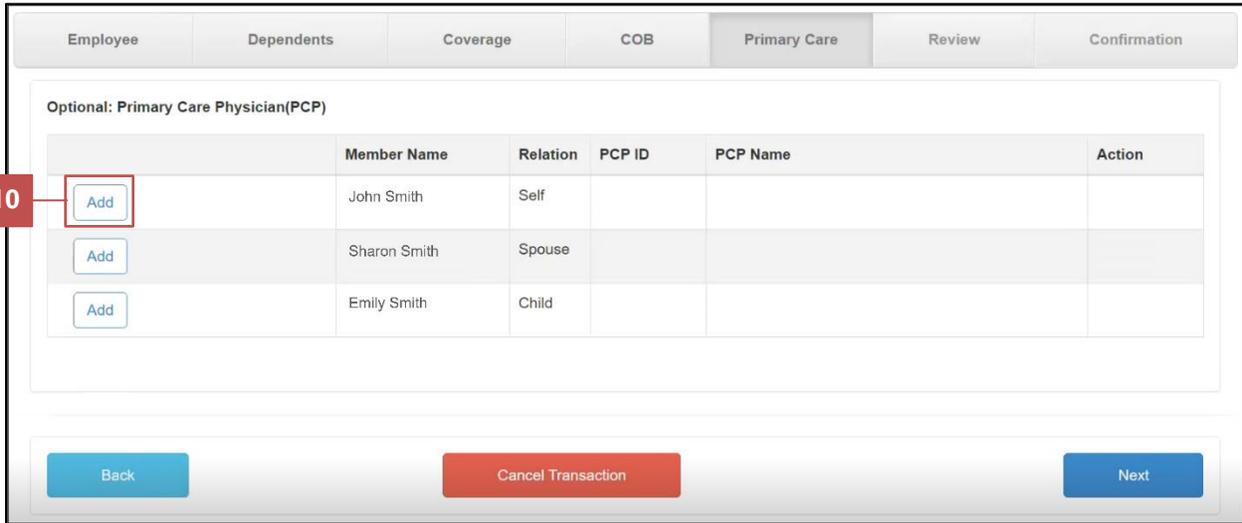
Zip
[Text Box]

Country
United States of Ame [Dropdown]

County
[Text Box]

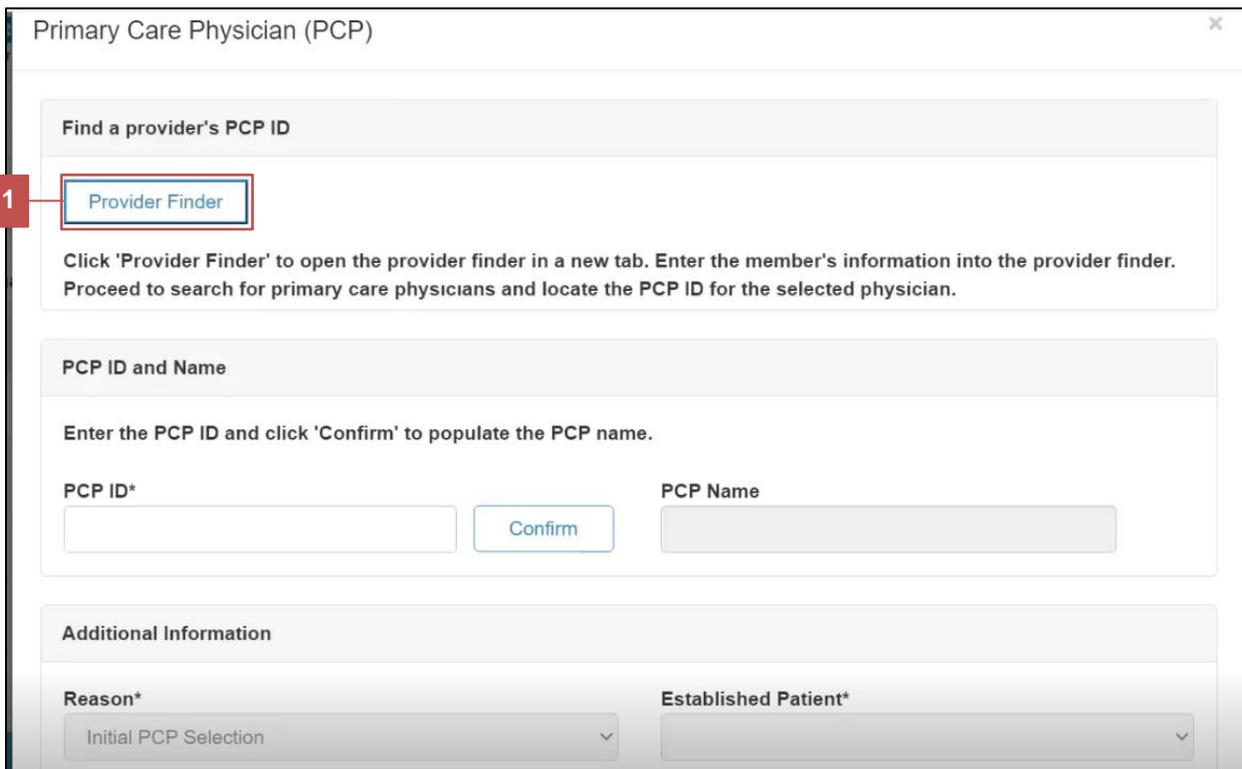
8

9. Once the details are added, the information will be displayed in the **COB** tab. Click the **Next** button to navigate to the next step.
10. The **Primary Care** section is displayed. This section allows the user to choose the Primary Care Physician (PCP) for the employee and the dependents. Click the **Add** button corresponding to the Member Name column.



| Member Name | Relation | PCP ID | PCP Name | Action |
|--------------|----------|--------|----------|--------|
| John Smith | Self | | | Add |
| Sharon Smith | Spouse | | | Add |
| Emily Smith | Child | | | Add |

11. The **Primary Care Physician (PCP)** dialog box is displayed. Click the **Provider Finder** button to search for the PCP you want to select.



Find a provider's PCP ID

Provider Finder

Click 'Provider Finder' to open the provider finder in a new tab. Enter the member's information into the provider finder. Proceed to search for primary care physicians and locate the PCP ID for the selected physician.

PCP ID and Name

Enter the PCP ID and click 'Confirm' to populate the PCP name.

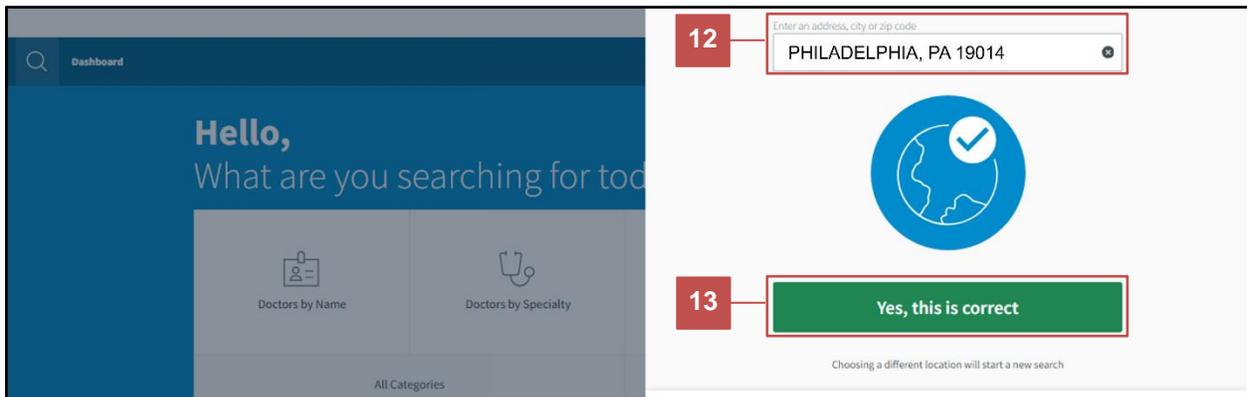
PCP ID* PCP Name

Additional Information

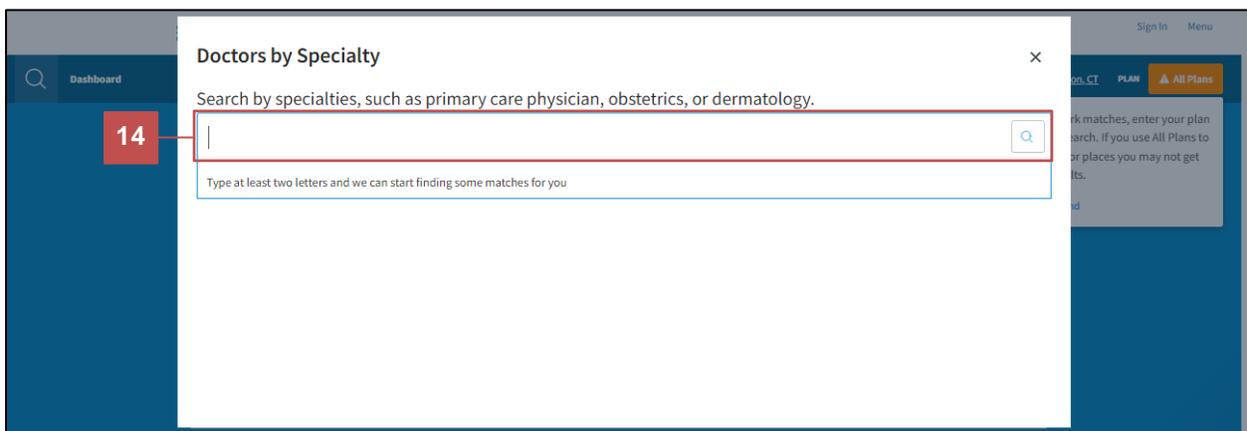
Reason* Established Patient*

12. The **Healthsparq** page is displayed. Enter your location in the **Enter an address, city or zip code** field.

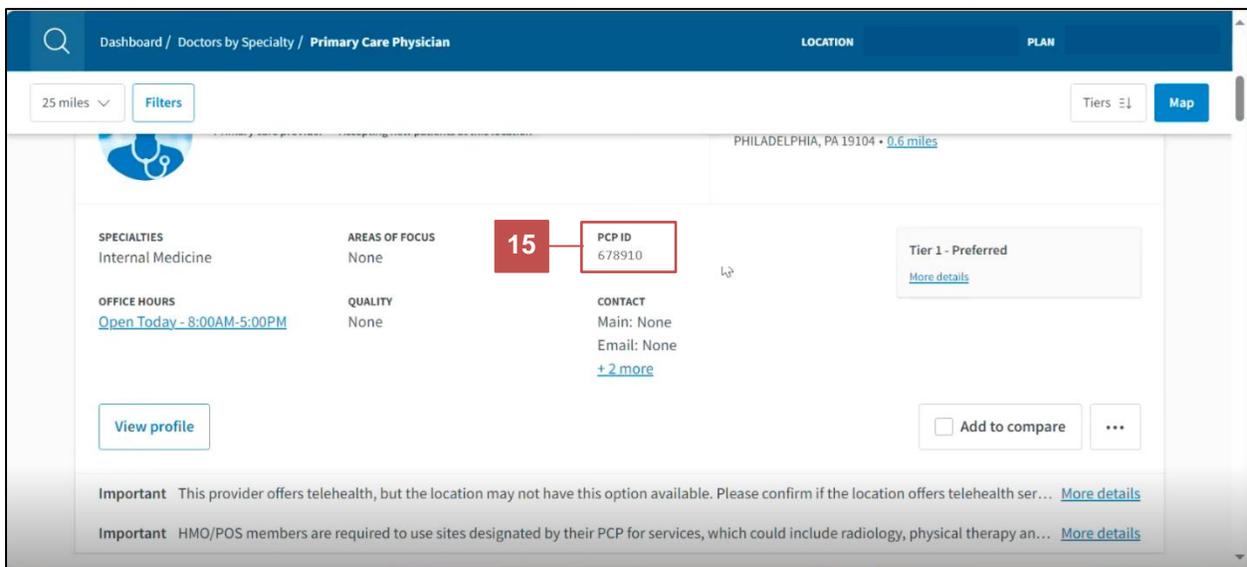
13. Click the **Yes, this is correct** button.



14. The **Doctors by Speciality** dialog box is displayed. Enter the speciality details in the **Search by specialties, such as primary care physician, obstetrics, or dermatology.** field and click the **search** icon to generate a list of providers that suit the search criteria.



15. Once you have selected a provider, copy the PCP ID of the PCP displayed.



- Paste the copied PCP ID in the **PCP ID** field in the **Physical Care Physician (PCP)** dialog box on the Group Portal and click the **Confirm** button to auto-populate the **PCP Name** field. Enter the details in the mandatory (and other, if required) fields.
- Click the **Add** button to add the details to the employee or subscriber selected.

Primary Care Physician (PCP)

Find a provider's PCP ID

Provider Finder

Click 'Provider Finder' to open the provider finder in a new tab. Enter the member's information into the provider finder. Proceed to search for primary care physicians and locate the PCP ID for the selected physician.

PCP ID and Name

Enter the PCP ID and click 'Confirm' to populate the PCP name.

PCP ID* 678910 Confirm PCP Name Internal Medicine Doctor

Additional Information

Reason* Initial PCP Selection Established Patient* Yes

17 Add Cancel



You can repeat the same steps to add the PCP details for the employee and all the dependents. If the user enters an invalid PCP, an error message will be displayed stating that the **PCP ID not valid or not in network. Enter a different PCP ID.**

- Click the **Next** button to navigate to the **Review** section.

| Employee | Dependents | Coverage | COB | Primary Care | Review | Confirmation |
|---------------------------------------|------------|----------|--------------------------|--------------|--------|--------------|
| Optional: Primary Care Physician(PCP) | | | | | | |
| Member Name | Relation | PCP ID | PCP Name | Action | | |
| John Smith | Self | 678910 | Internal Medicine Doctor | Add | | |
| Emily Smith | Child | | | | | |

Back Cancel Transaction 18 Next



This section is not mandatory, and the user can directly navigate to the **Review** section by clicking the **Next** button and not adding any PCP details.

You can click the **Undo Add** button to undo the changes made to the PCP details.

19. The **Review** section is displayed. You can review the details added to this entire transaction here before a final submission.

You can click the **Download as PDF** or **Download as Excel** button to download the transaction details to review.

20. Click the **Confirm** button to submit the transaction.

You can click the **Back** button if you want to edit the details in any of the sections.

Employee Dependents Coverage COB Primary Care **Review** Confirmation

This Transaction Has Not Yet Been Submitted

Download as PDF Download as Excel

Review Transaction:
Please review your selections. To change any information, revisit the prior tabs.
Effective Date: 7/1/2024 Sub Account: 990012 Submitted By: Alex Q
Transaction Reason: New Hire/Newly Eligible

Employee Information:
Prefix: Mr Middle Name: L Suffix: 3rd First Name: John Last Name: Smith Status: Add

Basic Information:
Relationship: Self Gender: Male Date Of Birth: 01/02/1990 SSN: 2468 Hire Date: 5/1/2024 Payroll Location: Smoking Status: Unknown Last Regular Use Date:

Contact and Address:
Home Phone: Mobile Phone: Email: Address: 123 Main St. Philadelphia, PA 19104

Back Cancel Transaction **20** Confirm

A message **This Transaction Has Been Submitted** is displayed. You can click the **Download as PDF** or **Download as Excel** button to download the transaction details.

SEARCH MEMBERS SEARCH TRANSACTIONS ADD TRANSACTION ACCOUNT SELECTION ADMINISTRATION

This Transaction Has Been Submitted

Download as PDF Download as Excel

Transaction Confirmation:
Add Confirmation Number: MET1234567

Effective Date: 7/1/2024 Sub Account: 990012 Submitted By: Alex Q
Transaction Reason: New Hire/Newly Eligible

Employee Information:

| | | | |
|--------------|-----|-------------|-------|
| Prefix: | Mr | First Name: | John |
| Middle Name: | L | Last Name: | Smith |
| Suffix: | 3rd | Status: | Add |

Basic Information:

| | |
|------------------------|------------|
| Relationship: | Self |
| Gender: | Male |
| Date Of Birth: | 01/02/1990 |
| SSN: | 2468 |
| Hire Date: | 5/1/2024 |
| Payroll Location: | |
| Smoking Status: | Unknown |
| Last Regular Use Date: | |

Contact and Address:

| | |
|---------------|--|
| Home Phone: | |
| Mobile Phone: | |
| Email: | |
| Address: | 123 Main St. Philadelphia, PA 19104 |



Even if you close the browser or window during the transaction, your progress will be saved, and you can search for the transaction to continue by selecting the **Search Transactions** tab. However, if you click the **Cancel Transaction** button at any point during the transaction, the progress will not be saved, and you will have to restart the transaction.

The updates made to the information on Member Enrollment will not be reflected in the Group Portal in real time, they will be reflected in the next 24 hours.

Edit Coverage

1. Click the **SEARCH MEMBERS** tab from the homepage.

1

SEARCH MEMBERS SEARCH TRANSACTIONS ADD TRANSACTION ACCOUNT SELECTION ADMINISTRATION

Search Criteria

First Name Last Name Member ID Status
 Active Inactive Both

Sub Account SSN/TIN Date of Birth Member Type
 Employee Dependent Both

Alternate ID

2. Enter the details of the member you want to edit the coverage for and click the **Search** button.



You can enter the details of the member in any of the below-mentioned fields to search for the member:

- First Name
- Last Name
- Member ID
- Sub Account
- SSN/TIN
- Date of Birth
- Alternate ID

3. Select the required member from the search results.

4. The page with all member details is displayed. Click the **Change/Edit Member** tab.

5. Click the **Edit** button to edit the coverage details of the member.

4

Change/Edit Member Coverage COB Review Confirmation

ME- Change Existing Coverage for Employee:

Event Effective Date * Change/Edit Reason * Sub Account
 Change Subaccount

Check if Employee is COBRA Participant

Change/Edit Membership

| | First Name | Last Name | Relationship | Gender | SSN | DoB | Action |
|---|------------|-----------|--------------|--------|-------------|------------|-------------------------------------|
| 5 | JOHN | SMITH | Self | Male | ***_**_2468 | 01/02/1990 | <input type="button" value="Edit"/> |

6. The **Edit Member** dialog box is displayed. Update the details as required and click the **Update** button.

Member Information

Prefix: [] First Name*: CRISTOPHER Middle Initial: J Last Name*: ADAMS

Suffix: JR Gender*: Male Female Unknown SSN: ***-**-0289 Confirm SSN: ***-**-0289

Date Of Birth*: [] Relation*: Child

Address Contact Info

Same as Employee

Address*: 1234 William Ln. Address 2: []

City*: Philadelphia State*: Pennsylvania Zip*: 19107 Country*: United States of An

County: Philadelphia

6 Update Cancel



You can either update the details in the other tabs or click the **Next** button to move to the **Confirmation** tab and save the updates.

Cancel Coverage

1. Click the **SEARCH MEMBERS** tab from the homepage.
2. Enter the name of the member you want to cancel the coverage for and click the **Search** button.

1 SEARCH MEMBERS SEARCH TRANSACTIONS ADD TRANSACTION ACCOUNT SELECTION ADMINISTRATION

2 Search Criteria

First Name: [] Last Name: [] Member ID: [] Status: Active Inactive Both

Sub Account: [] SSN/TIN: 00-000-0000 Date of Birth: mm/dd/yyyy [] Member Type: Employee Dependent Both

Alternate ID: [] Search

You can enter the details of the member in any of the below-mentioned fields to search for the member:



- First Name
- Last Name
- Member ID
- Sub Account
- SSN/TIN
- Date of Birth
- Alternate ID

3. Select the required member from the search results and clickn the **View** button.
4. Click the **TERMINATE COVERAGE** tab.
5. Select the relevant reason for termination and the effective date from the **Reason for Termination** and **Effective Date** drop-down fields.
6. Click the **Confirm Termination** button.
7. A dialog box is displayed asking if you are sure you want to terminate the employee. Click the **OK** button. The employee is terminated.

Reinstate a Member

1. Click the **SEARCH MEMBERS** tab from the homepage.
2. Enter the name of the member you want to reinstate the coverage for and click the **Search** button.

You can enter the details of the member in any of the below-mentioned fields to search for the member:



First Name
Last Name
Member ID
Sub Account
SSN/TIN
Date of Birth
Alternate ID

3. Select the member from the search results and ensure that the status of the member is **Inactive**. Click the **View** button.
4. Click the **Change/Edit Member** tab.
5. Select the required option from the **Change/Edit Reason** field and the effective date from the **Effective Date** field. Ensure that the effective date is the same as the last date of coverage.
6. Click the **Next** button and complete the transaction.

The screenshot shows the 'Change/Edit Member' form with the following elements:

- 4**: Points to the 'Change/Edit Member' tab.
- 5**: Points to the 'Event Effective Date' field and the 'Change/Edit Reason' dropdown menu.
- 6**: Points to the 'Next' button.

ME- Change Existing Coverage for Employee:

Event Effective Date *
mm/dd/yyyy

Change/Edit Reason *
Sub Account Transfer/Benefit Change
Member Demographic Change (Name/DOB/Address/SSN, etc.)
Dependent/Spouse Addition
Dependent/Spouse Termination
Coordination of Benefits Change
Multiple Changes

Sub Account
Change Subaccount

Check If Employee Is COBRA Participant

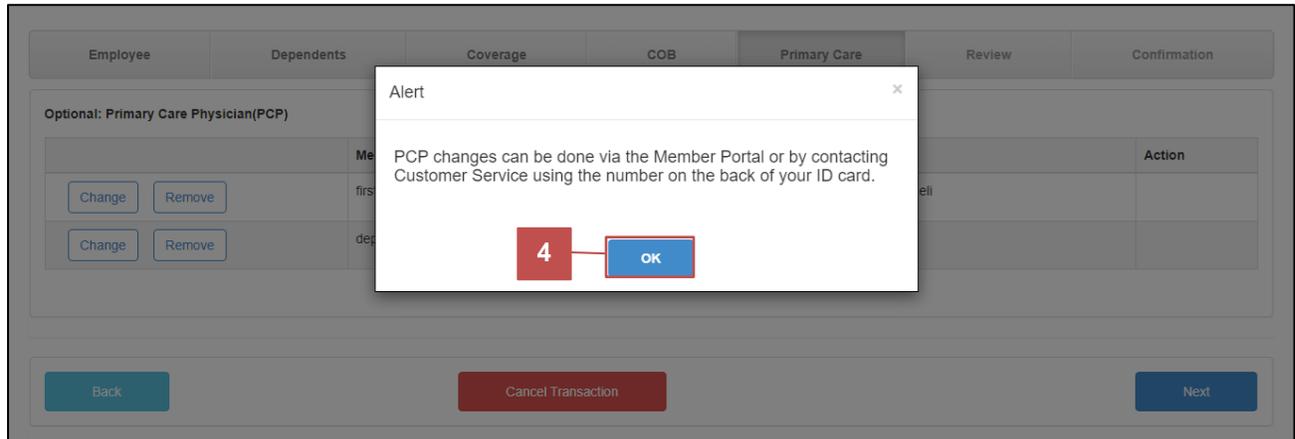
Change/Edit Membership

| | First Name | Last Name | Relationship | Gender | SSN | DoB | Action |
|------|------------|-----------|--------------|--------|-----|------------|--------|
| Edit | JERRY | MAXWELL | Self | Male | | 02/12/1979 | |

Add Dependent

Back Cancel Transaction Next

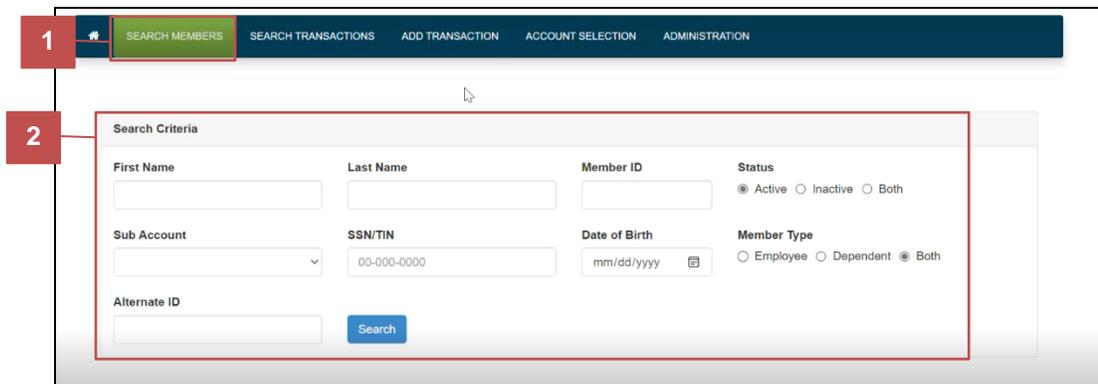
- The **Alert** dialog box is displayed with the message that the **PCP changes can be done via the Member Portal or by contacting Customer Service using the number on the back of your ID Card**. Click the **OK** button.



You can either update the details in the other tabs or click the **Next** button to move to the **Confirmation** tab and save the updates.

Remove PCP

- Click the **SEARCH MEMBERS** tab from the homepage.
- Enter the name of the member you want to remove the coverage for and click the **Search** button.



You can enter the details of the member in any of the below-mentioned fields to search for the member:

First Name
 Last Name
 Member ID
 Sub Account
 SSN/TIN
 Date of Birth
 Alternate ID

Retro Enrollment

For Group Portal users, the retroactive (retro) enrollment capability is now available for current admins. This capability is for retro enrollments updates with an effectivity date prior to the client migration date impacting the existing members.



The link to perform the retro add member transaction will not be available on the Add Transaction page initially. Navigate to the **Search Members > Member Details** page to access this link.

Perform the following steps for retroactively modifying enrollment:

1. Add the new member with the effective date set as the date of transition for the group. For example, while adding a member retroactively for a group transitioning on 7/1, you must first enroll the member with effective date as 7/1. You can refer to the [Add Subscribers and Dependents](#) section for the steps to add a new member.
2. Click the **SEARCH MEMBERS** tab from the homepage.
3. Enter the required parameters and click the **Search** button to search for the member you enroll in step 1.

2

3

SEARCH MEMBERS SEARCH TRANSACTIONS ADD TRANSACTION ACCOUNT SELECTION ADMINISTRATION

Search Criteria

First Name Last Name Member ID Status
 Active Inactive Both

Sub Account SSN/TIN Date of Birth Member Type
 00-000-0000 mm/dd/yyyy Employee Dependent Both

Alternate ID

4. The member details page will be displayed with the link to the **Retro Member Enrollment Form** available on top. Click the **link**.

CHANGE/EDIT COVERAGE TERMINATE COVERAGE SEARCH MEMBERS SEARCH TRANSACTIONS ADD TRANSACTION

4

Please use this [link](#) to submit member retro-enrollment transactions.

Employee Information

Effective Date and Account

Effective Date * 01/01/2024 Select Sub Account *

5. The **Retro Member Enrollment Form** page is displayed. Click the **Modify Member(s)** button to modify the effective date for a member.

Retro Member Enrollment Form

Submit

Customer Information

Customer ID: 1234567 Customer Name: JOHN SMITH

Member Information

*** Please click on the buttons to add/modify a member ***

Add Member(s) **Modify Member(s)**

| Name (** Added member) | Date of Birth | Group Number | Enrollment Status | Tobacco Use | Relationship | Family Status | Zip Code | Action |
|----------------------------|---------------|--------------|-------------------|-------------|--------------|---------------|----------|--------|
|----------------------------|---------------|--------------|-------------------|-------------|--------------|---------------|----------|--------|

6. Enter the pre-transition group number in the **Group Number** field and then, click the **Save** button.

Modify Member

Cancel Save

Subscriber

Subscriber Search

Group Number

Group Number is required



The retro enrollment transaction is available only in the Member Enrollment system as it ensures that the current access to care is confirmed first.

7. Once the group number is submitted, the **Alert** dialog box is displayed requesting the user to complete all necessary details before submitting. Click the **OK** button.

Modify Member

Cancel Save

Subscriber

Subscriber Search

Group Number

Subscriber SSN is required

Subscriber Information

First Name Middle Name

Alert

Please complete all necessary details before submitting.

Ok

8. Enter the details in the fields and click the **Save** button.
You can use the scroll bar to scroll to the bottom of the section to enter information in other fields.

The screenshot shows a web form titled "Modify Member" with a "Subscriber" tab. The form is divided into two sections: "Subscriber Search" and "Subscriber Information".

Subscriber Search:

- Group Number: 10808189
- Subscriber SSN: [Empty field] with error message "Subscriber SSN is required"

Subscriber Information:

- First Name: [Empty field] with error message "First Name is required"
- Middle Name: [Empty field]
- Last Name: [Empty field]
- Date of Birth: [Empty field]

At the top right of the form, there are "Cancel" and "Save" buttons. A red box with the number "8" is overlaid on the "Save" button. Another red box with the number "8" is overlaid on the "Subscriber Search" section header.