

**Dental/Vision
eService Instructions
For On-line Eligibility
Processing System**

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eService Usage Guidelines

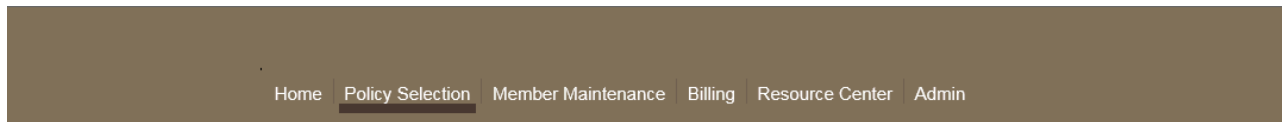
- Do not use the Back and Forward buttons on your Internet Browser to navigate between screens in eService, use the Quick Links menu on the Left-hand side of your screen. There is also top navigation available for your use. Use of the Back and Forward buttons could result in Critical Error screens or invalid processing of data.
- Capitalization is not required, we convert text to all capital letters when updating our system.
- Social Security Numbers – dashes should not be used when entering a Social Security Number.
- Required fields are indicated with an *.
- To be sure a record for a member does not already exist before adding them, you can go to the **View Member Record** from the menu and search for the member by Social Security Number, Name or Certificate Number.
- **Some requested transactions may automatically be forwarded to the Group Administration Department for review and the updated record will not be available for immediate viewing.**

Policy Selection

If you have the ability to access multiple policy numbers or multiple divisions, you will be prompted to select the policy and division you want to work within after you login. From this screen you should click on the radio button next to the policy/division number you want to access and then click the **Continue** button. You will be taken to the Home page.

If you have access to multiple policies or multiple divisions, you may change your policy and/or division selection at any time by clicking on the **Policy Selection** option from the tab at the top of the screen.

Note: If you have access to only one policy/division number, you will only have one selection.



POLICY SELECTION

If you have multiple policies, you can select them here. If you don't have multiple policies this page will not appear on your eServices website.

Select	Subsidiary-Policy-Division	Division Name
<input type="radio"/>	010-000001-00001	ABC Company
<input checked="" type="radio"/>	010-000002-00001	XYZ Company
<input type="radio"/>	010-000003-00001	Alpha Corporation
<input type="radio"/>	010-000004-00001	Monolith International
<input type="radio"/>	010-000005-00001	First Company
<input type="radio"/>	010-000006-00001	Second Unlimited
<input type="radio"/>	010-000007-00001	Company Tertiary
<input type="radio"/>	010-000008-00001	LMNO Company
<input type="radio"/>	010-000009-00001	A-Z Company
<input type="radio"/>	010-000010-00001	ZETA Company
<input type="radio"/>	010-000011-00001	Gold Company
<input type="radio"/>	010-000012-00001	Platinum Company

Continue

Home

Once you have entered your security login information and selected an account (if you have multiple policies), you will be taken to the Home page. The Home page provides links to Member Maintenance, Billing, and the Resource Center.

[Home](#) [Policy Selection](#) [Member Maintenance](#) [Billing](#) [Resource Center](#) [Admin](#)

HOME

Welcome to the eServices interactive tutorial!

Use the navigation and links in this tutorial site to learn more about how our eServices website can help administer your benefit plan(s).



PLAN DOCUMENTS

[View](#) the policy plan documents, certificates, and admin and benefit guides.

MEMBER MAINTENANCE

[Manage](#) your members and access ID Cards.

BILLING

[View](#) your billing statements and payment history.

REPORTS

[Transaction Summary](#) - View a list of recent online transactions.

Confirmation Number	Policy	Division	Name	Dependent Coverage	Submitted Date	Time	Status
123456AFG45	123456	00001	Doe,John	MEMBER ONLY	07/01/2015	10:03:25 am	Processed
123456AFG46	123456	00001	Doe,John	MEMBER AND FAMILY	07/02/2015	10:15:01 am	Sent for Review
123456AFG47	123456	00002	Doe,Jane	TERMINATED	07/15/2015	12:15:30 pm	Processed

[List Members Report](#) - View a list of active and terminated members.

[Overage Dependents](#) - Generate a report for dependents that are overage.

NEWS

Welcome to the new Benefit Administrator website!

Member Maintenance

The available functions are listed on the right-hand side of the screen. Click on any one of these functions to process your request.

Home | Policy Selection | Member Maintenance | Billing | Resource Center | Admin

MEMBER MAINTENANCE

When using the Member Maintenance section of the site you can add, change or terminate a member's coverage and access member ID cards and plan documents. You can also generate member reports.



ADD MEMBER

[Enroll](#) new members in your plan(s) real time.

MEMBER MAINTENANCE

[View or change](#) existing members coverage and download member ID Cards.

PLAN DOCUMENTS

[View](#) your policy plan documents, certificates and administration and benefit guides.

REPORTS

Confirmation Number	Policy	Division	Name	Dependent Coverage	Submitted Date	Time	Status	
123456AFG45	123456	00001	Doe,John	MEMBER ONLY	07/01/2015	10:03:25 am	Processed	<input type="button" value="v"/>
123456AFG46	123456	00001	Doe,John	MEMBER AND FAMILY	07/02/2015	10:15:01 am	Sent for Review	<input type="button" value="v"/>
123456AFG47	123456	00002	Doe,Jane	TERMINATED	07/15/2015	12:15:30 pm	Processed	<input type="button" value="v"/>

[Transaction Summary](#) - access detail on recent online transactions.

[List Members Report](#) - View a list of active and terminated members.

[Overage Dependents](#) - Generate a report for dependents that are overage.

Add Member

To add a member – click Add Member from the Member Maintenance home page.

home policy selection member maintenance billing resource center contact us admin

WELCOME BENEFITS ADMINISTRATOR
ABC COMPANY 123456 POLICY HOLDER

QUICK LINKS
add member
view member record
plan documents
member reports

ADD MEMBER
SELECT PLAN & ADD MEMBER > ADD COVERAGE & DEPENDENT(s) > CONFIRMATION

SELECT APPLICABLE DIVISION(s)

	<u>Division Name</u>	<u>Division Number</u>
<input checked="" type="checkbox"/>	ABC COMPANY DENTAL	00001
<input checked="" type="checkbox"/>	ABC COMPANY VISION	00002

+ Show Divisions

SELECTED DIVISION(s) :

	<u>Division Name</u>	<u>Division Number</u>
	ABC COMPANY DENTAL	00001
	*Class:	<input type="text"/>
	*Coverage Type:	<input type="text"/>

	<u>Division Name</u>	<u>Division Number</u>
	ABC COMPANY VISION	00002
	*Class:	<input type="text"/>
	*Coverage Type:	<input type="text"/>

Under Add Member, Click Enroll. Choose Division(s), Class, Coverage Type. This will take you to the Member Add screen. If you have multiple benefits (i.e. dental and vision) you can add both benefits at the same time. Just select each class benefit from the drop down menus as shown above and on the next page. Enter member data in appropriate fields. Some fields will only be displayed if they pertain to your policy, such as a class number and department number. If displayed, select the appropriate designation.

Signature Date

- It is very important that you enter the date the member signed the enrollment form. This is a required field. The signature date should agree with the date of original request for enrollment/change. **If waiting periods apply, our processing system will calculate the member's effective date using the date of hire and signature date according to your policy requirements.**
- The signature date is our way of asking – “When did the member authorize the enrollment, or change in benefit?”

QUICK LINKS

- [add member](#)
- [view member record](#)
- [plan documents](#)
- [member reports](#)

ADD MEMBER

SELECT PLAN & ADD MEMBER > ADD COVERAGE & DEPENDENT(s) > CONFIRMATION

SELECT APPLICABLE DIVISION(s)

<u>Division Name</u>	<u>Division Number</u>
<input checked="" type="checkbox"/> ABC COMPANY DENTAL	00001
<input checked="" type="checkbox"/> ABC COMPANY VISION	00002

+ Show Divisions

SELECTED DIVISION(s) :

<u>Division Name</u>	<u>Division Number</u>
ABC COMPANY DENTAL	00001
*Class:	01 - ALL ELIGIBLE EMPLOYEES ▾
*Coverage Type:	Member Only ▾

<u>Division Name</u>	<u>Division Number</u>
ABC COMPANY VISION	00002
*Class:	02 - ALL ELIGIBLE EMPLOYEES ▾
*Coverage Type:	Member and Spouse ▾

Add Member

→ Member:

*SSN: (no dashes)

*Date of Birth:

*Gender:

*Address:

*City:

*State:

*Zip Code:

eMail:

Occupation:

Hours Worked:

*Date of Hire:

*Signature Date:

→ Continue Enrollment

Additional Coverage Information

When adding a member/dependent that did not elect coverage when they were initially eligible, it is possible a Late Entrant limitation could apply to their coverage. Once you have clicked on the Submit button, our processing system will determine if the member is a possible Late Entrant. If so, the Additional Coverage Information screen will display. The Additional Coverage Information screen contains various questions that will be used to determine if Late Entrant limitations should apply.

Select one of the reasons to explain the event that caused the change in coverage.

- Marital status change - if enrolling for coverage due to a marital status change
- Birth/Adoption of a child - if enrolling for coverage due to birth/adoption of a child
- Loss of Coverage Elsewhere
 - ✓ Select Termination of Employment - if enrolling because other coverage was lost due to termination of employment (spouse terminated employment)
 - ✓ Select Plan Terminated/loss of coverage - if enrolling because their prior plan ended
 - ✓ Select Other - if not the result of Termination of Employment or Plan Terminated
- Enter the date of the event that resulted in the election of coverage i.e. date of marriage, divorce, birth/adoption, date other coverage ended
- If Other - enter the date of the event that resulted in the election of coverage.

QUICK LINKS

[add member](#)
[view member record](#)
[plan documents](#)
[member reports](#)

VIEW MEMBER

Late Entrant Form
Please fill out this form and [Submit](#) [Help](#)

Certificate: 215
Member Name: TESTER,TESTY
Social Security Number: 987654321

Additional Coverage Information:

What Event caused the change in coverage? (select any one)

Marital Status Change
 Birth/Adoption of a Child
 Loss of Coverage Elsewhere due to Termination of employment
 Loss of Coverage Elsewhere due to Plan terminated/loss of coverage
 Loss of Coverage Elsewhere due to Other
 Other

*Date of Event:

View Member Record (Search)

Selecting the View Member Record link on the right, will take you to the View Member Record screen where you can search for an existing member by typing in their Social Security Number, Member Name (or partial last name), or their Certificate Number.

Enter your search criteria

- You can search by Social Security Number, Name or Certificate Number
Enter only one of the criteria to do your search
- To search on the Social Security number - enter the number without any dashes and click submit
- To search on name - enter last name,first name (example: small,susie) and click submit
- To search on certificate - enter the member's certificate number and click submit

A partial last name can be entered. If multiple members exist with the same portion of the Member Name that you entered, an Insured Member List screen will be displayed for you to select the appropriate member. See the next page for more on Insured Member List.

QUICK LINKS

- [add member](#)
- [view member record](#)
- [plan documents](#)
- [member reports](#)

VIEW MEMBER

Please enter a SSN or Member Name or Certificate

View Member Record

Social Security Number:
(no dashes or spaces)

Member Name:
(ex. SMITH,JOHN or SMITH or SMI)

Certificate:

Insured Member List

If you entered a member's name and multiple records exist, a list will display

- Click on the radio button next to the member's name you want to view
- Click on the Submit button to view the member's information.

Once you have selected the member whose coverage you wish to view/update, their current dependent coverage status and effective date will be displayed along with their member information.

If you do not find the member you were searching for, you can re-enter the member information in the above section (Social Security Number, Member Name or Certificate) and press Search.

QUICK LINKS

- [add member](#)
- [view member record](#)
- [plan documents](#)
- [member reports](#)

VIEW MEMBER

Please enter a SSN or Member Name or Certificate

View Member Record

Social Security Number:
(no dashes or spaces)

Member Name:
(ex. SMITH,JOHN or SMITH or SMI)

Certificate:

Search Results

	Name	Type	Policy	Division	Effective Date	Coverage Level
<input checked="" type="radio"/>	TEST_MEMBER	DENTAL		1	07/01/2015	MEMBER
<input type="radio"/>	TEST,TEST	DENTAL		1	07/01/2015	MEMBER AND SPOUSE
<input type="radio"/>	TEST,TEST	DENTAL		1	08/01/2015	MEMBER
<input type="radio"/>	TESTER,TESTY	DENTAL		1	08/01/2015	MEMBER AND SPOUSE
<input type="radio"/>	TEST,TEST	VISION		2	07/09/2015	MEMBER

Note: If multiple members with same last names do not exist, it will go directly to the member's information screen.

Member View/Change Record

Note: You must be viewing the member in order to change a record. See the previous page on *View Member Record (Search)* instructions.

By clicking on the View Member Record, you can edit an existing member's information, edit/add dependent information or terminate coverage for a member.

For the purpose of these instructions we will discuss member change on page 13, edit/add dependent information on page 17, and member termination on page 24

QUICK LINKS

- [add member](#)
- [view member record](#)
- [plan documents](#)
- [member reports](#)

VIEW MEMBER

Member Information

Name	Policy	Division	Certificate	Coverage Type
TEST,JOHN	123456	2	111	VISION

Current Status: Active **Effective:** 06/01/2015 **Coverage Level:** MEMBER AND FAMILY

Social Security Number: 111111111

Date of Birth: 01/01/1955

Full Time Date of Hire: 02/01/2014

Department:

Class: 02 - ALL ELIGIBLE EMPLOYEES

Address: 111 TEST DR, TEST - NE 68521-2501

E-mail Address: JTEST@TEST.COM

Dependent Information

Dependent Name	Relationship	Date of Birth	Gender	Effective Date	Coverage Status	Dependent Code
TEST,JANE	Spouse	03/08/1972	Female	06/01/2015	Active	
TEST,JACK	Child	02/18/1998	Male	06/01/2015	Active	

ID & Savings Cards

[View, print or save](#) a member ID card.

(Note: It may take a few moments to generate your individual ID Card.)

Member Change

Go to the View Member Record link and search for the member you want to change. Once the member record is displayed click the **Change/Edit** button near the middle of the screen to access the Member Information screen.

On the Member Information screen you can update the member's personal information, change their dependent coverage, change their class or department (if multiple classes or departments exist), terminate their coverage or elect COBRA coverage.

Member Information

- Change the necessary fields on the member's record
- Select a new class if the member classification level has changed

If your group receives ID cards, changes to a member's name and/or adding or removing dependent coverage will generate new ID cards.

QUICK LINKS

- [add member](#)
- [view member record](#)
- [plan documents](#)
- [member reports](#)

VIEW MEMBER

Change Edit Member TEST, MEMBER Division 1 Certificate 231 Coverage Type DENTAL [Help](#)

Member Information

*First Name	MI	*Last Name	Suffix
Member Name: MEMBER		TEST	
*Gender: Male			
*Social Security Number: 123213213	(no dashes)		
*Date of Birth: 01/01/1955			
*Full Time Date of Hire: 06/01/2015			
Class: 01 - ELIGIBLE MANAGER ELECTING DENTAL			
Occupation:			
*Address: 475 FALLBROOK BLVD			
*City: LINCOLN			
*State: Nebraska			
*ZipCode: 68521			
E-mail Address:			

Member Status	Effective Date	Coverage Level
New Status		
	07/01/2015	MEMBER

COBRA (check mark box)

*Signature Date:

Member Change – continued

Coverage Level

- Select the new dependent coverage level if dependent coverage has changed.
- When adding a dependent that did not elect coverage when they were initially eligible, it is possible a Late Entrant limitation could apply to their coverage. If so, the Additional Coverage Information Screen will display after you have clicked the Submit button. See the Additional Coverage Information instructions. If you have questions regarding the Late Entrant provision contact Group Administration for assistance.

New Status (Requested date of change)

Enter the requested effective date of the change in coverage.

Signature Date

Enter the date the enrollment/change form was signed or the member requested the change.

Help

Clicking on the Help link at the top right of your screen will display a second window with definitions of language used on Member Information screen.

COBRA Coverage

If a member has elected COBRA coverage, go to the View Member Record link and lookup the member you want to change. Once the member record is displayed, select the member, which will bring you to the Member Information screen. Click the **Change/Edit** button near middle of the screen.

QUICK LINKS

- add member
- view member record
- plan documents
- member reports

VIEW MEMBER

Member Information

Name	Policy	Division	Certificate	Coverage Type
TEST, MEMBER			231	DENTAL

Current Status: Active Effective: 09/01/2015 Coverage Level: MEMBER AND CHILD

Prior Status Effective Coverage Level

Active 07/01/2015 MEMBER

Social Security Number: 123213213

Date of Birth: 01/01/1955

Full Time Date of Hire: 06/01/2015

Department:

Class: 01 - ELIGIBLE MANAGER ELECTING DENTAL

Address: 475 FALLBROOK BLVD LINCOLN - NE 68521-9033

E-mail Address:

Select the new Member Status Effective Date, Coverage Level, select the COBRA box, and enter the Signature Date as the date the member was eligible for COBRA coverage, and then click Submit. The COBRA screen (shown on the next page) will appear prompting you to answer the questions clarifying the COBRA election and the members that should remain on COBRA.

QUICK LINKS

- add member
- view member record
- plan documents
- member reports

VIEW MEMBER

Change Edit Member TEST, TEST Division 1 Certificate 217 Coverage Type DENTAL [Help](#)

Member Information

*First Name MI *Last Name Suffix

Member Name: TEST [] TEST []

*Gender: Male [v]

*Social Security Number: [] (no dashes)

*Date of Birth: 08/12/1955 []

*Full Time Date of Hire: 06/01/2015 []

Class: 01 - ELIGIBLE MANAGER ELECTING DENTAL [v]

Occupation: []

*Address: 475 FALLBROOK BLVD []

*City: LINCOLN []

*State: Nebraska [v]

*Zip Code: 68521 []

E-mail Address: []

Member Status Effective Date Coverage Level

New Status [] [v]

07/01/2015 MEMBER AND SPOUSE

COBRA (check mark box)

*Signature Date: []

- Enter the date of the COBRA qualifying event
- Select the reason for the COBRA change
- If none of the reasons apply, select Other and enter a description.
- Enter who (including the member) should be covered under COBRA: their social security number, date of birth and relationship to the member
- Click the **Submit** button

QUICK LINKS

[add member](#)

[view member record](#)

[plan documents](#)

[member reports](#)

VIEW MEMBER

*Date of Qualifying Event:

Reason for Coverage Charge:

If Other selected please specify:

Name	SSN	Date Of Birth	Relationship
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Select One"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Select One"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Select One"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Select One"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Select One"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Select One"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Select One"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Select One"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Select One"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Select One"/>

Add/Edit Dependent Information

Add/Edit Dependent Information is available if you want to add a dependent or update an existing dependent's information.

QUICK LINKS

- [add member](#)
- [view member record](#)
- [plan documents](#)
- [member reports](#)

VIEW MEMBER

Member Information

Name	Policy	Division	Certificate	Coverage Type
TEST,TEST		1	217	DENTAL

Current Status: Active **Effective:** 07/01/2015 **Coverage Level:** MEMBER AND SPOUSE
Social Security Number: 453215321
Date of Birth: 08/12/1955
Full Time Date of Hire: 06/01/2015
Department: EUPHORIA
Class: 01 - ELIGIBLE MANAGER ELECTING DENTAL
Address: 475 FALLBROOK BLVD, LINCOLN - NE 68521-0
E-mail Address:

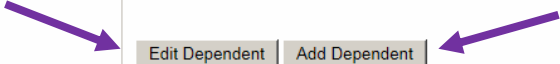
[Change/Edit](#) [Terminate](#) [Return to Search](#) [New Search](#)

Dependent Information

Dependent Name	Relationship	Date of Birth	Gender	Effective Date	Coverage Status	Dependent Code
TEST,SPOUSE	Spouse	08/09/1957	Female			

[Edit Dependent](#) [Add Dependent](#)

ID & Savings Cards
[View, print or save](#) a member ID card.
(Note: It may take a few moments to generate your individual ID Card.)



Add Dependent

Click on Add Dependent and you will then be taken to the Add Dependents information screen. Enter each dependent's information and click on the **Add** button after each one is added. You can use the **Edit** or **Remove** buttons shown below if you incorrectly added a dependent or need to make a correction to the record. When the last dependent is added, click on **Continue Enrollment**.

QUICK LINKS

- add member
- view member record
- plan documents
- member reports

ADD MEMBER

[SELECT PLAN & ADD MEMBER >](#) [ADD COVERAGE & DEPENDENT\(S\) >](#) [CONFIRMATION](#)

Add Dependents

Add Dependents **Division Number**
 ABC COMPANY 00001

Product Type:
 Class Description: 01 - ELIGIBLE MANAGER ELECTING DENTAL
 Coverage Type: Member and Family

Dependent Information

*Relationship: Child
 *First Name MI *Last Name Suffix
 Dependent: test
 *Date Of Birth: 08/01/2015
 SSN: (no dashes)
 Gender: Female
 Dependent Status Code:
 Dependent Status Code Date:

Add

Added Dependents

Name	SSN	Relationship	Date Of Birth	Edit	Remove
tester, test		Spouse	08/10/1972		

Continue Enrollment

Note: The Dependent Status Code and Dependent Status Code Date fields should only be completed if the dependent being added is a full-time student, temporarily disabled, or permanently disabled. The Dependent Status Code Date field should be populated with the date that the dependent's special status was last verified. (Questions regarding these fields should be directed to Group Administration.)

See **Dependent Relationship Information** if you entered Other as the dependent's relationship to the member.

This confirmation screen will show the information just added with a confirmation number. If you click on the **Add Member** button, it will take you to a new screen to begin adding another member.

QUICK LINKS

- add member
- view member record
- plan documents
- member reports

ADD MEMBER

[SELECT PLAN & ADD MEMBER >](#) [ADD COVERAGE & DEPENDENT\(S\) >](#) [CONFIRMATION](#)

Confirmation

Confirmation Number	Policy Division	Name	Submitted Date	Time
215284478		Test,Testing	08/10/2015	07:26:18

Add Member

(continue to next page...)

If your plan has two benefits (i.e. dental and vision) and a member elects the same coverage level for both benefits (i.e. both have Member and Spouse coverage), the dependent(s) you added to the first line of coverage can be copied to the second line of coverage using the **Copy Dependent(s) to this Plan** button.

When the first benefit information has been loaded, immediately after you click on **Continue Enrollment**, it will bring up the screen for the second benefit. It is here that you can click on **Copy Dependent(s) to this Plan** button.

QUICK LINKS

- add member
- view member record
- plan documents
- member reports

ADD MEMBER

SELECT PLAN & ADD MEMBER > ADD COVERAGE & DEPENDENT DIV1 > ADD COVERAGE & DEPENDENT DIV2 > CONFIRMATION

Add Dependents

Add Dependents Division Number
 XYZ COMPANY 00002

Product Type:
 Class Description: 03 - ELIGIBLE MANAGER ELECTING VISION
 Coverage Type: Member and Spouse

Copy Dependent(s) to this Plan

Dependent Information

*Relationship: Select One
 *First Name MI *Last Name Suffix
 Dependent:
 *Date Of Birth:
 SSN: (no dashes)
 Gender:

Add

Complete Enrollment

You can still add an additional dependent(s) to the second line of coverage if needed by completing the dependent information section and click the **Add** button.

QUICK LINKS

- add member
- view member record
- plan documents
- member reports

ADD MEMBER

SELECT PLAN & ADD MEMBER > ADD COVERAGE & DEPENDENT DIV1 > ADD COVERAGE & DEPENDENT DIV2 > CONFIRMATION

Add Dependents

Add Dependents Division Number
 XYZ COMPANY 00002

Product Type:
 Class Description: 03 - ELIGIBLE MANAGER ELECTING VISION
 Coverage Type: Member and Family

Dependent Information

*Relationship: Select One
 *First Name MI *Last Name Suffix
 Dependent:
 *Date Of Birth:
 SSN: (no dashes)
 Gender:

Add

Added Dependents

Name	SSN	Relationship	Date Of Birth	Edit	Remove
tester_test		Spouse	08/10/1972		
Tester, Tester		Child	08/10/2013		
tester_test		Child	08/01/2015		

Complete Enrollment

Once all dependents have been added to the second benefit, click the **Complete Enrollment** button. A screen with a confirmation number will show the completed enrollment for both divisions.

Dependent Relationship Information

Dependent Child Information

Complete all fields and click Submit and the information will be sent to Group Administration for review.

QUICK LINKS

- [add member](#)
- [view member record](#)
- [plan documents](#)
- [member reports](#)

VIEW MEMBER

Certificate: D
Member Name: TESTER,TESTY
Social Security Number: 987654321

Dependent Child Information

Coverage is being requested for the dependent listed below

*Name (First Name Last Name)
*Date Of Birth (yyyy/mm/dd)
Relationship to Member
Gender
Effective Date

What portion of the support of the child is contributed by the member?

Are you entitled to take Federal Income Tax deductions for the child?(Yes/No)?

Who is legally responsible for the payment of the child's medical expenses?

How long has the current support arrangement existed?

where does the child actually reside?

What are the circumstances regarding the natural parents of the child - are they deceased,divorced and where do they currently reside?

Is the current support arrangement governed by legal documents,such as divorce degree or guardianship papers?

Domestic Partner Information

Complete all fields and click Submit and the information will be sent to Group Administration for review.

QUICK LINKS

- [add member](#)
- [view member record](#)
- [plan documents](#)
- [member reports](#)

VIEW MEMBER

Add Dependents Dependent Information

*Relationship:

*First Name MI *Last Name Suffix

Dependent

*Date Of Birth:

SSN: (no dashes)

Gender:

You are attempting to add a dependent to this Member's record with a Relationship Code of "Other - Domestic Partner". Please note that this dependent will not automatically be added to our system. An automated notice is being sent to Group Administration

Edit Dependent

Go to the View Member Record link and Lookup the member you want to change. Once the member record is displayed click the **Edit Dependent** button near middle of the screen to access the Dependent Information screen.

QUICK LINKS

- add member
- view member record
- plan documents
- member reports

VIEW MEMBER

Member Information

Name	Policy	Division	Certificate	Coverage Type
TESTER,TEST NAME			232	DENTAL

Current Status: Active Effective: 08/01/2015 Coverage Level: MEMBER AND FAMILY
Social Security Number: 123456789
Date of Birth: 01/01/1970
Full Time Date of Hire: 07/16/2015
Department:
Class: 01 - ELIGIBLE MANAGER ELECTING DENTAL
Address: 12345 HELLO STREET, LINCOLN - NE 68507-0
E-mail Address:

Change/Edit Terminate Return to Search New Search

Dependent Information

Dependent Name	Relationship	Date of Birth	Gender	Effective Date	Coverage Status	Dependent Code
TESTER,HAPPY	Spouse	07/01/1972	Male			

Edit Dependent Add Dependent

[View, print or save](#) a member ID card.
(Note: It may take a few moments to generate your individual ID Card.)

Click the radio button next to the dependent you want to edit. Click on the Edit/Term Dependent button.

QUICK LINKS

- add member
- view member record
- plan documents
- member reports

VIEW MEMBER

Select Dependent

Name	Relationship	Date Of Birth	Gender	Effective Date	Coverage Status	Dependent Code
<input type="radio"/> TESTER,HAPPY	Spouse	07/01/1972	Male			

Edit/Term Dependent Back to Member View

The Dependent Information screen allows you to update information on an eligible dependent or terminate the dependent. Complete all fields and click **Update**.

QUICK LINKS

- add member
- view member record
- plan documents
- member reports

VIEW MEMBER

Select Dependent

Name	Relationship	Date Of Birth	Gender	Effective Date	Coverage Status	Dependent Code
<input checked="" type="radio"/> TESTER,HAPPY	Spouse	07/01/1972	Male			

Edit/Term Dependent Back to Member View

*Relationship: Spouse

*First Name MI *Last Name Suffix
Dependent: HAPPY [] TESTER []

*Date Of Birth: 07/01/1972
SSN: [] (no dashes)
Gender: Male

Dependent Terminate Code Date: []

Update
Back to Dependents

The Dependent Status Code Date field is displayed to select if this dependent is a full-time student, temporarily disabled, or permanently disabled. After information is complete, click on the **Add** button.

QUICK LINKS

- add member
- view member record
- plan documents
- member reports

VIEW MEMBER

Add Dependents Dependent Information

*Relationship: Select One
Spouse
Child
Other - Domestic Partner
Other - Dependent Child

Dependent: *Last Name: Suffix:

*Date Of Birth:

SSN: (no dashes)

Gender:

Dependent Status Code:

Dependent Status Code Date:

Add

Submit **Cancel/Return to Member View**

After you make all changes and click the **Update** button (shown on previous page), a confirmation number will appear at the top of the screen.

QUICK LINKS

- add member
- view member record
- plan documents
- member reports

VIEW MEMBER

✔ **Dependent Added Successfully.** Confirmation Number is: 215316974

Member Information

Name	Policy	Division	Certificate	Coverage Type
TESTER,TEST NAME	39712	1	232	DENTAL

Current Status: Active **Effective:** 08/01/2015 **Coverage Level:** MEMBER AND FAMILY

Social Security Number: 123456789

Date of Birth: 01/01/1970

Full Time Date of Hire: 07/16/2015

Department:

Class: 01 - ELIGIBLE MANAGER ELECTING DENTAL

Address: 12345 HELLO STREET, LINCOLN - NE 68507-0

E-mail Address:

Change/Edit **Terminate** **Return to Search** **New Search**

Dependent Information

Dependent Name	Relationship	Date of Birth	Gender	Effective Date	Coverage Status	Dependent Code
TESTER,HAPPY	Spouse	07/01/1972	Male			
testers,test	Child	08/10/1972	Female			PERMANENT DISABILITY (Permanently Disabled)

Edit Dependent **Add Dependent**

Contact us

Contact us allows you to send communication directly to Group Administration regarding a particular member. This should be used to communicate pertinent information regarding the status of the member or for questions regarding a member's current status. It is important to provide your contact information so that a Group Administration Representative can communicate a response to you directly. The form requires that you enter your Name in order for the memo to be processed.

This function can be used to send a question to Group Administration. Access this option from the View/Change/Term Member Record by looking up the member you want to send a memo on. The screen will populate the Memo screen with the Member's Certificate Number, Name, and Social Security Number.

Once you have entered your question or comment and have completed your Contact Information, click on the **Submit** button to send to Group Administration.

Unlike other transactions, confirmation numbers are not assigned to memos. The transaction summary does not capture this request.

CONTACT FORM

Name

Phone
 - -

Message

View, Print or Save a member ID card

Note: You must *Lookup* the member from the View Member Record screen in order to request an ID card or certificate.

You may request a personalized ID card by clicking on the **View, Print, or Save** a member ID card link. This will give you immediate access to the member's personalized ID card. From there you may attach a PDF or print off the ID card and provide it to the member.

Print Member Certificate and/or ID Cards

- From the drop down menu, Select ID Card or ID Card and Certificate to be printed
- Click Request button
- This process may take up to 10 days to complete from the time of the request to the printing and mailing to the member.

A new ID card automatically prints when a member's name is changed, or a new member is added.

If your group receives ID cards, changes to a member's name and/or adding or removing dependent coverage will generate new ID cards.

Unlike other transactions, confirmation numbers are not assigned to request for ID Cards/Certificates. The transaction summary does not capture this request.

QUICK LINKS

- [add member](#)
- [view member record](#)
- [plan documents](#)
- [member reports](#)

VIEW MEMBER

Member Information

Name	Policy	Division	Certificate	Coverage Type
TEST,JOHN	123456	2	111	VISION

Current Status: Active **Effective:** 06/01/2015 **Coverage Level:** MEMBER AND FAMILY
Social Security Number: 111111111
Date of Birth: 01/01/1955
Full Time Date of Hire: 02/01/2014
Department:
Class: 02 - ALL ELIGIBLE EMPLOYEES
Address: 111 TEST DR, TEST - NE 68521-2501
E-mail Address: JTEST@TEST.COM

[Change/Edit](#) [Terminate](#) [Return to Search](#) [New Search](#)

Dependent Information

Dependent Name	Relationship	Date of Birth	Gender	Effective Date	Coverage Status	Dependent Code
TEST,JANE	Spouse	03/08/1972	Female	06/01/2015	Active	
TEST,JACK	Child	02/18/1998	Male	06/01/2015	Active	

[Edit Dependent](#) [Add Dependent](#)

[View, print or save](#) a member ID card.
(Note: It may take a few moments to generate your individual ID Card.)

Request Member Certificate or ID Card by Mail
Please note these documents are automatically requested when a member is added or an existing member's information is changed

Member Termination

Go to the View Member Record link and search for the member you want to terminate. Once the member record is displayed, click the Change/Edit button near the middle of the screen to access the Member Information screen. Select the Terminate button to access the Member Termination screen.

QUICK LINKS

- [add member](#)
- [view member record](#)
- [plan documents](#)
- [member reports](#)

VIEW MEMBER

Member Information

Name	Policy	Division	Certificate	Coverage Type
TEST,TEST			217	DENTAL

Current Status: Active Effective: 07/01/2015 Coverage Level: MEMBER AND SPOUSE

Social Security Number:

Date of Birth: 08/12/1955

Full Time Date of Hire: 06/01/2015

Department: EUPHORIA

Class: 01 - ELIGIBLE MANAGER ELECTING DENTAL

Address: 475 FALLBROOK BLVD, LINCOLN - NE 68521-0

E-mail Address:

Dependent Information

Dependent Name	Relationship	Date of Birth	Gender	Effective Date	Coverage Status	Dependent Code
TEST,SPOUSE	Spouse	08/09/1957	Female			

[View, print or save](#) a member ID card.
(Note: It may take a few moments to generate your individual ID Card.)

Enter the last date of coverage or last day worked and click the terminate button.

*If member has multiple lines of coverage, you will need to go into both lines of coverage to terminate the member (example dental and vision).

QUICK LINKS

- [add member](#)
- [view member record](#)
- [plan documents](#)
- [member reports](#)

VIEW MEMBER

Member Information

Name	Policy	Division	Certificate	Coverage Type
TEST,TEST			959	A

Social Security Number: 123456789

Department: 0

Class: 01 - ALL ELIGIBLE EMPLOYEES

Effective: 06/01/2015

Current Coverage Level: A

Member Coverage Termination Date:

Member List

This function allows you to generate a list of active members as of a given date. This is located on the home page or the Member maintenance page. Click on **List Members Report**. Select the division you want to run the report for. You can enter the “Effective As Of” date to receive a list of active members as of the date specified. This date can be in the future or in the past. The calendar next to the date field allows you to quickly select the date you are requesting. Select “active”, “active & terminated” or “terminated”.

Click on the **Generate Report** button to process your request.

Once your request has been processed, the Member List will be returned in the same browser you are currently in.

See the next page for sorting options.



HOME

Welcome to the eServices interactive tutorial!

Use the navigation and links in this tutorial site to learn more about how our eServices website can help administer your benefit plan(s).



PLAN DOCUMENTS

[View](#) the policy plan documents, certificates, and admin and benefit guides.

MEMBER MAINTENANCE

[Manage](#) your members and access ID Cards.

BILLING

[View](#) your billing statements and payment history.

REPORTS

[Transaction Summary](#) - View a list of recent online transactions.

Confirmation Number	Policy	Division	Name	Dependent Coverage	Submitted Date	Time	Status
123456AFG45	123456	00001	Doe,John	MEMBER ONLY	07/01/2015	10:03:25 am	Processed
123456AFG46	123456	00001	Doe,John	MEMBER AND FAMILY	07/02/2015	10:15:01 am	Sent for Review
123456AFG47	123456	00002	Doe,Jane	TERMINATED	07/15/2015	12:15:30 pm	Processed

[List Members Report](#) - View a list of active and terminated members.

[Overage Dependents](#) - Generate a report for dependents that are overage.

NEWS

Welcome to the new Benefit Administrator website!

Member List (continued)

The following options are available for use with the Active Member List:

Sort

By clicking on a field's title (e.g. SSN) the list will be resorted according to that field in ascending order.

Load in Excel or PDF

To transfer the data from this list into an Excel or PDF file click on the appropriate icon in the upper left corner of the title bar as highlighted in red. If you do not have the Excel application on your system, the file will open within your browser.

Edit a Member's Information or Coverage

To edit a specific member's information or coverage, click on the member's name. You will be returned to the Member Information screen to update their information or coverage. To return to an updated list after you have changed the member's information, click on the Member Reports on the left hand side menu. To look at a different division, click on Division Number. Select Report with the pull down option, add "effective as of" date, and select the status. Click on the **Generate Report** button to process your request.

To return to home, click on the home link at the top of the page.

The screenshot shows a web interface for generating member reports. On the left, there are quick links: [add member](#), [view member record](#), [plan documents](#), and [member reports](#). The main area is titled "MEMBER REPORTS" and contains the following elements:

- A table with columns "Division Name" and "Division Number". One row is visible: ABC COMPANY | 1.
- A "Select Report:" dropdown menu set to "List Members Report".
- An "Effective As Of" date field set to "07/01/2015" with a calendar icon and "(MM/DD/YYYY)" format indicator.
- A "Status:" section with radio buttons for "Active" (selected), "Active & Terminated", and "Terminated".
- A "Generate Report" button.
- Download icons for PDF and Excel files, with the text "Download this information to a PDF or Excel file".
- Report title: "Members List", "Effective as of 07/01/2015", and "- ABC COMPANY".
- A note: "Click on Member Name to view the Member's information".
- A footer note: "You can sort by Cert,SSN,Name,Effective Date,Dependent Code or Class".
- A table header with columns: DIV, [Cert](#), [SSN](#), [Name](#), Effective Date, [Dep Cd](#), [Class](#), Status.

eBill

(Only available for eBill users)

To view your current bill click on billing tab, then click on Access under Current Billing. The Billing Statement will be displayed with information regarding the billing period and premium amounts.



CURRENT BILLING

[Access](#) your current billing statement.

REQUEST BILL

[Request](#) your next billing statement when you are ready for it.

RECENT PAYMENTS

[View](#) your recent payments.

REPORTS

[Billing Reports](#) - access detailed billing and payment reports.

PAY YOUR BILL ONLINE

[Electronic Funds Transfer \(EFT\)](#) It's the simplest method of paying your premium. No more checks to write! It's automatic and reliable. It allows for peace of mind however you do business. After we set up your account, you will be able to pay your bill online by simply selecting 'Pay Bill'.

Mail the [form](#) and voided check to:

The "Total amount billed," reflects the total amount owed for the current month including adjustments and any previous credit or debit.

The bill provides a list of the billed members with their Premium and Adjustments for a specific billing.

The bill can be sorted by: Name, Certificate Number/Social Security Number (CERT/SSN), Class, or by Dependent Coverage Code (DEP CD). Click on the appropriate heading to sort the report.

The detail can be loaded as a PDF file for viewing and printing. To use these functions, click on the appropriate icon for your request.

CURRENT BILLING STATEMENT



Current Billing Statement

Billing Date 06/15/2015 through 07/14/2015

Account Summary		Payment amount not equal this 'Total Amount Due'? Make member changes now to ensure the adjustment(s) will be reflected on your next billing statement.
Previous Amount Due	\$2483.80	Still have billing questions?
Payments Received Prior	\$2483.80	Call us at
Balance Forward	\$0.00	Please print this page and return with payment for the total amount due to:
Current Statement Premium	\$2758.96	
Current Statement Adjustment	\$0	
TOTAL AMOUNT BILLED	\$2758.96	

Current Billing Statement Details
Due Date: June 2015

Name	Cert/SSN	Class	Dep Cd	Member Rate	Dependent Rate	Adjustment Date	Adjustment Amount	Total Rate
		1	C	\$28.28	\$36.04		\$0	\$64.32
		1	D	\$28.28	\$69.44		\$0	\$97.72
		1	A	\$28.28	\$0		\$0	\$28.28
		1	A	\$28.28	\$0		\$0	\$28.28
		1	A	\$28.28	\$0		\$0	\$28.28
		1	C	\$28.28	\$36.04		\$0	\$64.32
		1	B	\$28.28	\$33.40		\$0	\$61.68
		1	A	\$28.28	\$0		\$0	\$28.28
		1	A	\$28.28	\$0		\$0	\$28.28
		1	A	\$28.28	\$0		\$0	\$28.28
		1	A	\$28.28	\$0		\$0	\$28.28

Total Current Premium \$2758.96
Total Adjustment \$0

TOTAL AMOUNT BILLED \$2758.96

For payment submission, please print this page and mail it with your payment.

Billing Reports

(Only available for eBill users)

The screenshot shows the 'BILLING REPORTS' section of a web application. On the left, there are 'QUICK LINKS' for 'current billing statement', 'request bill', and 'billing reports'. The main area is titled 'Selected Desired Division' and contains a radio button for 'Select', a 'Division Name' field with 'COMPANY, INC. DBA TAB', and a 'Division Number' dropdown menu with '00001'. Below this is a 'Select a report' dropdown menu with 'Select One' selected, and a 'Generate Report' button. A dropdown menu is open, showing three options: 'Billing History Report', 'Payment History Report', and 'Recent Payments Report'.

To view billing history, payment history or recent payments complete the following steps:

- Select the policy and division you want to review by clicking on Select Policy/Division Number
- Select a report from the drop down box and click on **Generate Report** button

Links to the previous month's billing are listed on the Billing History report. By clicking on [List](#) under Billing Statement the selected month's information will be displayed

The screenshot shows the 'Billing History Report' interface. It includes the same 'Selected Desired Division' section as the previous screenshot, but with 'Billing History Report' selected in the 'Select a report' dropdown. Below the form, there is a table with the following data:

Due Date	Coverage From	Coverage Through	Bill Prepared	Total Due	Billing Statement
June 2015	06/15/2015	07/14/2015	06/15/2015	\$2758.96	List
May 2015	05/15/2015	06/14/2015	05/15/2015	\$2483.80	List
April 2015	04/15/2015	05/14/2015	04/15/2015	\$2391.32	List
March 2015	03/15/2015	04/14/2015	03/16/2015	\$1290.80	List
February 2015	02/15/2015	03/14/2015	02/16/2015	\$1493.88	List
January 2015	01/15/2015	02/14/2015	01/15/2015	\$1056.80	List
December 2014	12/15/2014	01/14/2015	12/15/2014	\$1655.92	List
November 2014	11/15/2014	12/14/2014	11/17/2014	\$2383.44	List
October 2014	10/15/2014	11/14/2014	10/15/2014	\$2612.44	List

A purple arrow points to the 'List' link in the 'Billing Statement' column for June 2015.

For a list of payments received and billing amounts for a specific policy and division complete the following steps:

- Select the policy and division you want to review by clicking on Select Policy/Division Number
- Select a report from the drop down box and click on **Generate Report** button

BILLING REPORTS

Selected Desired Division

Select Division Name



Division Number

00001



Select a report

Payment History Report

Generate Report

Payment History Report



Policy	Division	Payment	Billed Amount	Due Month
	00001	\$2483.80	\$2483.80	May 2015
	00001	\$2391.32	\$2391.32	April 2015
	00001	\$1290.80	\$1290.80	March 2015
	00001	\$1493.88	\$1493.88	February 2015
	00001	\$1056.80	\$1056.80	January 2015
	00001	\$1655.92	\$1655.92	December 2014
	00001	\$2383.44	\$2383.44	November 2014
	00001	\$2612.44	\$2612.44	October 2014
	00001	\$2499.32	\$2499.32	September 2014
	00001	\$2347.52	\$2347.52	August 2014



Return to Billing Home

For a list of recent payments received for a specific policy and division complete the following steps:

- Select the policy and division you want to review by clicking on Select Policy/Division Number
- Select a report from the drop down box and click on **Generate Report** button


BILLING REPORTS

Selected Desired Division

Select Division Name Division Number 00001  

Select a report

Recent Payments Report



Policy	Received date	Amount received
	06/11/2015	\$2483.80

Request Bill

(Only available for eBill users)

If your premiums are paid through the current month, you will have the ability to request your next month's billing. You will need to follow the same procedure for each Division. If a specific Division is not paid through the current month, a message stating Request bill is not available will appear.

Once you have made the necessary enrollment changes you may be ready to request your bill. Click on the Request Bill function to initiate the transaction. The following verification screens will appear displaying the month you are requesting your bill for. If you are ready to proceed with the billing request, click on Submit. If you need to make additional changes, click on Cancel/Return to Billing. You can then complete your changes and follow the previously defined process to request your bill. You will receive a confirmation number verifying the transaction has been processed. The bill generation is an overnight process.

Once your bill has run, you will receive an email notifying you that your bill is available. The email will come from eBill@employeebenefitervice.com. You can then retrieve your bill by clicking on the current billing statement link for each specific division.

QUICK LINKS

- current billing statement
- request bill**
- billing reports

REQUEST BILL

Select Division(s) to Request Bill

Select	Division Name	Division Number	Month Requesting
<input checked="" type="checkbox"/>		00001	August 2015

Request Selected Bill(s)

REQUEST BILL

The following bills will be generated overnight as requested. You will receive an email notification when your billing is ready to view.

August 2015

Submit Cancel/Return to Billing Home

REQUEST BILL

The following bills have been requested

Confirmation Number	Policy Number	Division Name	Date
214730753			August 2015

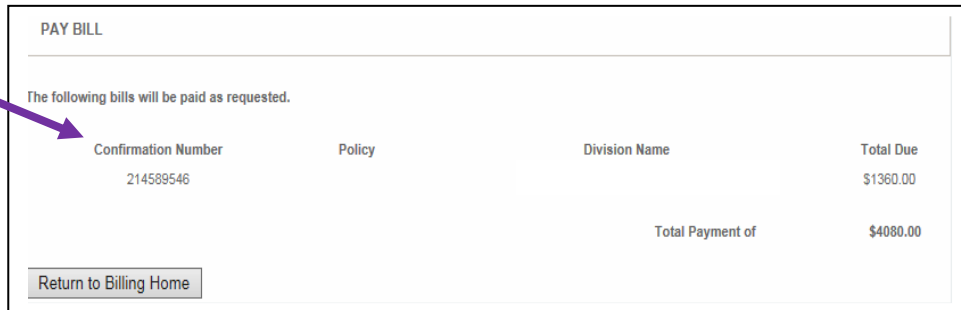
Return to Billing Home

Pay Bill (Only available for users who have eBill and signed up for ePay)

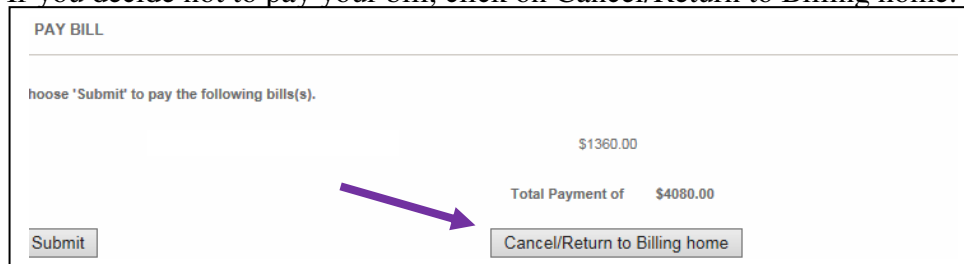
Once your billing is available for the current month, you will have the ability to pay your bill online. If this option is available for you, the Pay Bill selection will appear in the Quick Links menu. You will need to follow the same procedure for each Division. If a specific Division is not billed through the current month, a message stating Pay Bill is not available will appear.



After you have reviewed your billing you can click on the Pay Bill function to initiate the transaction. This transaction will generate withdrawal of the billed amount from your account on the next working day. If you are ready to proceed with the payment request, click on the **Submit** button. You will receive a confirmation number for this transaction.



If you decide not to pay your bill, click on Cancel/Return to Billing home.




Transaction Summary

The Transaction Summary gives you the ability to view transactions for a specified period of time. To select this option, click on Transaction Summary under REPORTS on the Home or the Member Maintenance screen.

Enter the beginning date and end date for the Transaction Summary you want to view.

A Transaction Summary includes the status of all additions, terminations, and coverage changes submitted through the site, which generated a confirmation number. Most changes are immediately processed, but this list will tell you if any were sent for review.

HOME



PLAN DOCUMENTS
[View](#) your policy plan documents, certificates, and administration and benefit guides.

MEMBER MAINTENANCE
[Manage](#) your employee members and access ID Cards.

BILLING
[Access](#) your billing and view your billing statement.

REPORTS
[Transaction Summary](#) - access detail on recent online transactions

Confirmation Number	Policy	Division	Name	Dependent Coverage	Submitted Date	Status
214557134	23893	1	TESTER,TEST	MEMBER AND SPOUSE	07/07/2015	Processed

Overage Dependent Report

The Overage Dependent Report gives you the ability to view your member's covered dependent children who have or will be over the age that a dependent child can be covered by the plan. To select this option, click on the Overage Dependent Report under REPORTS on the Home or the Member Maintenance screen and then click on Generate Report.

The *Overage Dependent Report* can be downloaded as an Excel or PDF file.

Letters created can be saved or printed by selecting the *Generate Overage Dependent Letters* button.

QUICK LINKS

- [add member](#)
- [view member record](#)
- [plan documents](#)
- [member reports](#)

MEMBER REPORTS

<u>Division Name</u>	<u>Division Number</u>
<input checked="" type="checkbox"/> ABC COMPANY	1

Select Report:

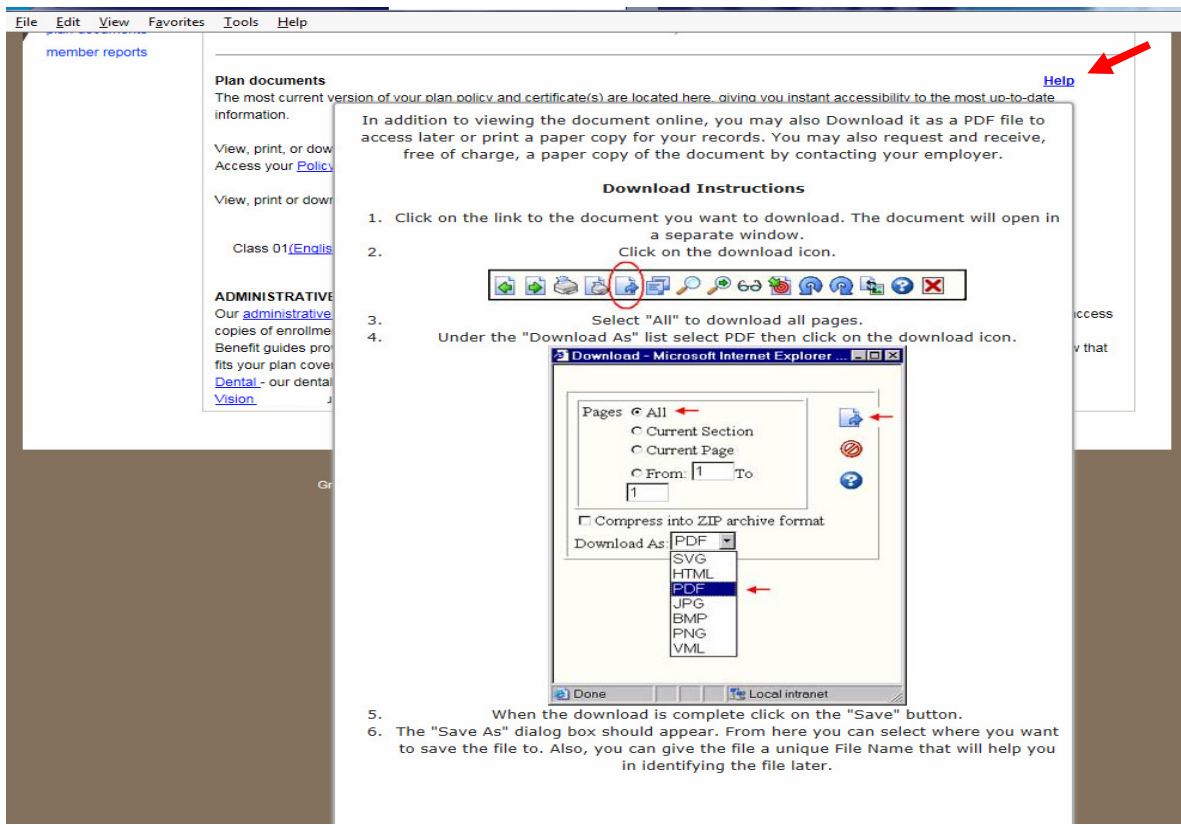
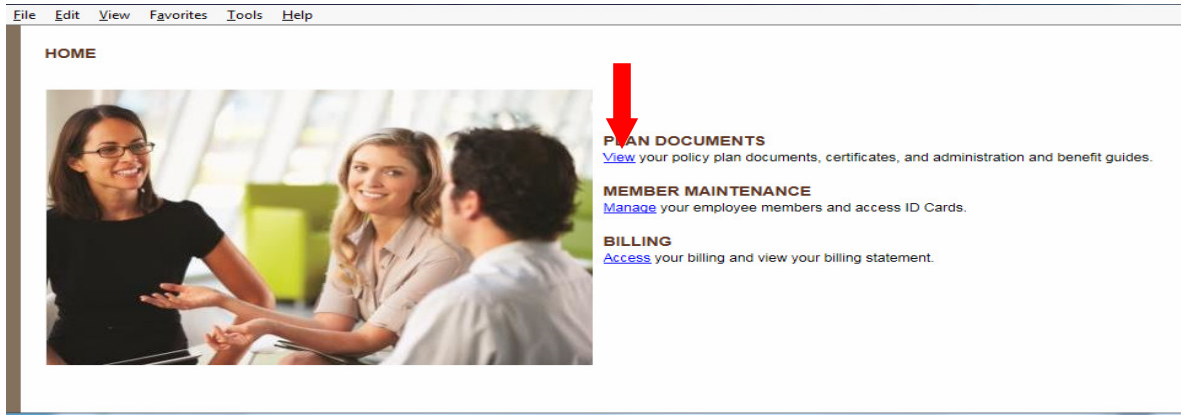
Download this information to a PDF or Excel file

Overage Dependent Report
10 - 23893 - ABC COMPANY

Cert	Employee Name	Addr 1	Dependent Name	Age	Coverage Level	Status Date	Dependent Status	Dependent DOB
----------------------	-------------------------------	--------	----------------	-----	----------------	-------------	------------------	---------------

Plan Documents

Select View under Plan Documents on the Home screen to view the policy or certificate for your plan.



If your plan has more than one member class, a sample certificate will be available for each class.

QUICK LINKS

- [add member](#)
- [view member record](#)
- [plan documents](#)
- [member reports](#)

PLAN DOCUMENTS

Policy Number: 123456 Policy Name: ABC COMPANY
Division Number: 0 Division Name: ABC COMPANY

Plan documents [Help](#)

The most current version of your plan policy and certificate(s) are located here, giving you instant accessibility to the most up-to-date information.

View, print, or download the policy for your records.
Access your [Policy](#)

View, print or download the plan Certificate(s). The following Certificate(s) apply to the plan(s).

Class 01([English](#)) ALL ELIGIBLE EMPLOYEES

ADMINISTRATIVE AND BENEFITS GUIDES

Our [administrative guide](#) provides you with all the information you need to administer your plan. Use it to learn how to enroll members, access copies of enrollment/change waiver forms, contact us and more.

Benefit guides provide information on how claims are handled, including how you should submit a claim. Choose the benefit guide below that fits your plan coverage.

[Dental](#) - our dental plans
[Vision](#) - our eye care plan based on a maximum covered expense per covered procedure

The screen provides details on how to download the policy and/or certificate(s) by hovering over the Help link.

File Edit View Favorites Tools Help

member reports

Plan documents [Help](#)

The most current version of your plan policy and certificate(s) are located here, giving you instant accessibility to the most up-to-date information.

In addition to viewing the document online, you may also Download it as a PDF file to access later or print a paper copy for your records. You may also request and receive, free of charge, a paper copy of the document by contacting your employer.

Download Instructions

1. Click on the link to the document you want to download. The document will open in a separate window.
2. Click on the download icon.
3. Select "All" to download all pages.
4. Under the "Download As" list select PDF then click on the download icon.
5. When the download is complete click on the "Save" button.
6. The "Save As" dialog box should appear. From here you can select where you want to save the file to. Also, you can give the file a unique File Name that will help you in identifying the file later.

Download - Microsoft Internet Explorer...

Pages: All Current Section Current Page

From: 1 To: 1

Compress into ZIP archive format

Download As: PDF

- SVG
- HTML
- PDF
- JPG
- BMP
- PNG
- VML

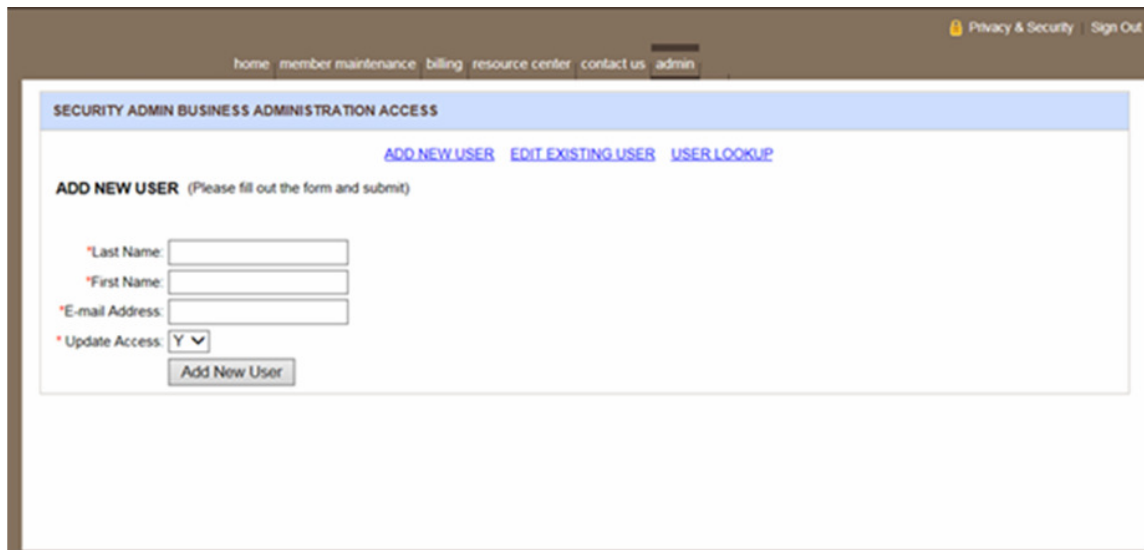
Security Administrator Access Instructions

As a Security Administrator you have access to Add and Edit users on your plan in eServices. You can add as many users as you would like to have access to your plan. You do not have to add additional users but this functionality is included so that you may add them.

Please note this is only applies to the User that is designated as the Security Administrator.

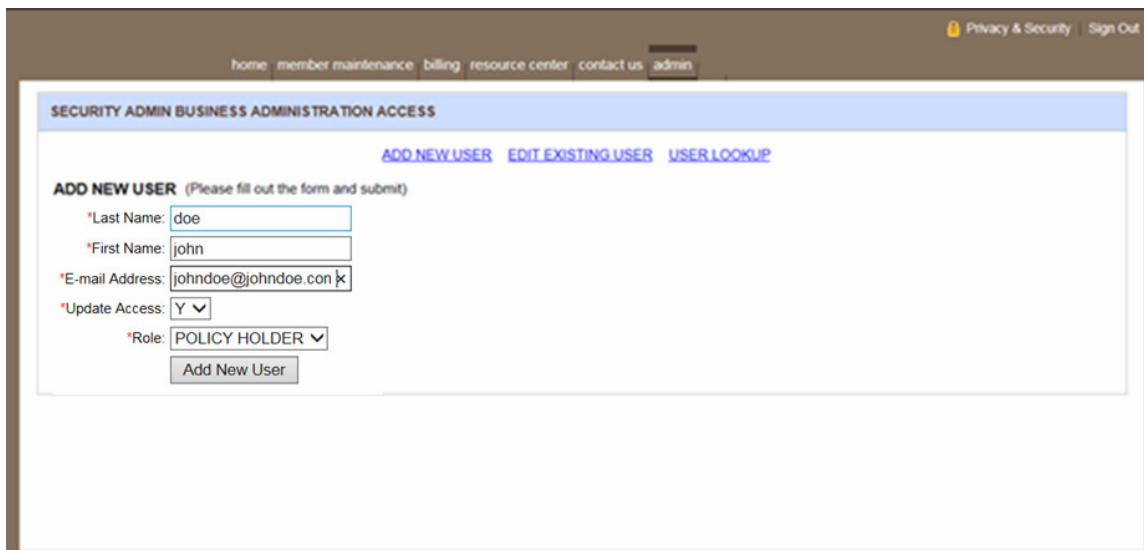
Adding an additional User

- Select the admin tab at the top of the page.



The screenshot shows a web application interface for user management. At the top, there is a navigation bar with links: home, member maintenance, billing, resource center, contact us, and admin. The main content area is titled "SECURITY ADMIN BUSINESS ADMINISTRATION ACCESS" and contains three links: ADD NEW USER, EDIT EXISTING USER, and USER LOOKUP. Below these links is the "ADD NEW USER" form, which includes fields for Last Name, First Name, E-mail Address, and Update Access (a dropdown menu). An "Add New User" button is located at the bottom of the form.

- Enter the new user's information
 - Last Name
 - First Name
 - E-mail Address
 - Update Access Y or N. Y is for access to add/change/terminate member's access N is for view only access.



This screenshot shows the same "ADD NEW USER" form as the previous one, but with sample data entered into the fields. The Last Name field contains "doe", the First Name field contains "john", and the E-mail Address field contains "johndoe@johndoe.com". The Update Access dropdown menu is set to "Y". A new "Role" dropdown menu has been added below the Update Access field, with "POLICY HOLDER" selected. The "Add New User" button remains at the bottom of the form.

- Click the Add New User button.
- You will receive a user successfully added message. An Auth ID will be sent to that user's email address that you entered along with instructions on how to create a User ID and log into eServices.

home member maintenance billing resource center contact us admin

Privacy & Security | Sign Out

SECURITY ADMIN BUSINESS ADMINISTRATION ACCESS

[ADD NEW USER](#) [EDIT EXISTING USER](#) [USER LOOKUP](#)

ADD NEW USER (Please fill out the form and submit)

✔ User John doe has been added successfully; Auth ID - ScRG5a5EwMNS has been sent Aug 6, 2015 3:07:22 PM

*Last Name:

*First Name:

*E-mail Address:

*Update Access:

*Role:

Edit an Existing User

You may want to update an existing user's email address, name, update access, or resend the Auth ID.

- Select the admin tab at the top of the page.
- Select Edit Existing User

SECURITY ADMIN BUSINESS ADMINISTRATION ACCESS

[ADD NEW USER](#) [EDIT EXISTING USER](#) [USER LOOKUP](#)

EDIT EXISTING USER (Please fill out the form and submit)

User ID:

OR

Last Name:

First Name:

E-mail Address:

- Enter the name of the person, their User ID if you know it, or their email address to locate the user. Click Search.

SECURITY ADMIN BUSINESS ADMINISTRATION ACCESS

[ADD NEW USER](#) [EDIT EXISTING USER](#) [USER LOOKUP](#)

EDIT EXISTING USER (Please fill out the form and submit)

User ID:

OR

Last Name:

First Name:

E-mail Address:

✔ Search results

User ID	First Name	Last Name	E-mail	Update Access	S-P-D	User Status
<input type="radio"/> xxxxxxxx	John	Doe	johndoe@johndoe.com	Y	Xxx-xxxxx-xxxxx	In-Active

- Click on the radio button next to the user's name to edit their eServices access.
- Click the Edit Existing User button to make changes to their name, email address or change them from update access to no update access and back.
- Make the changes then click the Update button.

[ADD NEW USER](#) [EDIT EXISTING USER](#) [USER LOOKUP](#)

EDIT EXISTING USER (Please fill out the form and submit)

User ID:

OR

Last Name:

First Name:

E-mail Address:

Search results

User ID	First Name	Last Name	E-mail	Update Access S-P-D	User Status
<input type="radio"/> <u>XXXXXXXXXX</u>	John	Doe	johndoe@johndoe.com	Y	Xxx-xxxxxx-xxxxx

Please update fields and click update button.

User ID: \$mytfs0qvq\$

*First Name:

*Last Name:

*E-mail Address:

Update Access:

- You will get a confirmation that the changes have been made.

[ADD NEW USER](#) [EDIT EXISTING USER](#) [USER LOOKUP](#)

EDIT EXISTING USER (Please fill out the form and submit)

User John Doe has been updated successfully Aug 6, 2015 3:21:10 PM

User ID:

OR

Last Name:

First Name:

E-mail Address:


Search results

User ID	First Name	Last Name	E-mail	Update Access S-P-D	User Status
<input type="radio"/> <u>XXXXXXXXXX</u>	John	Doe	johndoe@johndoe.com	Y	Xxx-xxxxxx-xxxxx

- You can resend an Auth ID you sent out to someone. The Auth ID gives a new user access to eServices. If someone lost the eMail that was originally sent with their Auth ID you can resend it to them.
- The User Status column must say In-Active
- Select the radio button next to the user's name
- Click the Resend Authorization button

[ADD NEW USER](#) [EDIT EXISTING USER](#) [USER LOOKUP](#)

EDIT EXISTING USER (Please fill out the form and submit)

 **AuthID - \$MytfsP0QVq\$ has been resent successfully. Aug 6, 2015 3:22:49 PM**

User ID:

OR

Last Name:

First Name:

E-mail Address:

 **Search results**

User ID	First Name	Last Name	E-mail	Update AccessS-P-D	User Status
<input type="radio"/> XXXXXXXXXX	John	Doe	johndoe@johndoe.com	Y Xxx-XXXXXX-XXXXX	In-Active

- You will get a confirmation that the Auth ID has been resent.

Remove a User

You may want to remove a user who is no longer able to make changes to your coverage through eServices.

- Select the admin tab at the top of the page.
- Select Edit Existing User

SECURITY ADMIN BUSINESS ADMINISTRATION ACCESS

[ADD NEW USER](#) [EDIT EXISTING USER](#) [USER LOOKUP](#)

EDIT EXISTING USER (Please fill out the form and submit)

User ID:

OR

Last Name:

First Name:

E-mail Address:

- Enter the name of the person, their User ID if you know it, or their email address to locate the user. Click Search.

SECURITY ADMIN BUSINESS ADMINISTRATION ACCESS

[ADD NEW USER](#) [EDIT EXISTING USER](#) [USER LOOKUP](#)

EDIT EXISTING USER (Please fill out the form and submit)

User ID:

OR

Last Name:

First Name:

E-mail Address:

✓ Search results

User ID	First Name	Last Name	E-mail	Update AccessS-P-D	User Status
<input type="radio"/> xxxxxxxx	John	Doe	johndoe@johndoe.com	Y	Xxx-xxxxx-xxxxx

- Click on the radio button next to the user's name.
- Select Remove Existing User
- You will be asked if you're sure you want to remove this user.
- If you are sure, click OK.

[ADD NEW USER](#) [EDIT EXISTING USER](#) [USER LOOKUP](#)

EDIT EXISTING USER (Please fill out the form and submit)

✔ **AuthID - \$MytfsP0QVq\$ has been resent successfully. Aug 6, 2015 3:22:49 PM**

User ID:
OR
Last Name:
First Name:
E-mail Address:

✔ **Search results**

User ID	First Name	Last Name	E-	Status
<input type="radio"/> XXXXXXXX	John	Doe	joh	

Message from webpage

Are you sure you want to remove the existing user relationship?

- The user will be removed from access to your plan in eServices.

Edit a User's Policy or Division access

You may have access to either multiple divisions or multiple policies in eServices. If you do, then you may need to update a user's access to these multiple policies or divisions. This step is not needed if you only have access to one policy and division.

- Select the admin tab at the top of the page.
- Select Edit Existing User

SECURITY ADMIN BUSINESS ADMINISTRATION ACCESS

[ADD NEW USER](#) [EDIT EXISTING USER](#) [USER LOOKUP](#)

EDIT EXISTING USER (Please fill out the form and submit)

User ID:

OR

Last Name:

First Name:

E-mail Address:

- Enter the name of the person, their User ID if you know it, or their email address to locate the user. Click Search.

SECURITY ADMIN BUSINESS ADMINISTRATION ACCESS

[ADD NEW USER](#) [EDIT EXISTING USER](#) [USER LOOKUP](#)

EDIT EXISTING USER (Please fill out the form and submit)

User ID:

OR

Last Name:

First Name:

E-mail Address:

✔ Search results

User ID	First Name	Last Name	E-mail	Update AccessS-P-D	User Status
<input type="radio"/> XXXXXXXXX	John	Doe	johndoe@johndoe.com	Y	Xxx-xxxxx-xxxxx

- Click on the radio button next to the user's name.
- Select the Map this User button

[ADD NEW USER](#) [EDIT EXISTING USER](#) [USER LOOKUP](#)

EDIT EXISTING USER (Please fill out the form and submit)

User ID:

OR

Last Name:

First Name:

E-mail Address:

Search results

User ID	First Name	Last Name	E-mail	Update AccessS-P-D	User Status
<input type="radio"/> <u>XXXXXXXXXX</u>	John	Doe	johndoe@johndoe.com	Y	Xxx-XXXXXX-XXXXX In-Active

- Select the radio button of the divisions or policies that you want the user to have access to.

Select	Subsidiary-Policy-Division	Division Name
<input type="radio"/>	010-000001-00001	ABC Company
<input checked="" type="radio"/>	010-000002-00001	XYZ Company
<input type="radio"/>	010-000003-00001	Alpha Corporation
<input type="radio"/>	010-000004-00001	Monolith International
<input type="radio"/>	010-000005-00001	First Company
<input type="radio"/>	010-000006-00001	Second Unlimited
<input type="radio"/>	010-000007-00001	Company Tertiary
<input type="radio"/>	010-000008-00001	LMNO Company
<input type="radio"/>	010-000009-00001	A-Z Company
<input type="radio"/>	010-000010-00001	ZETA Company
<input type="radio"/>	010-000011-00001	Gold Company
<input type="radio"/>	010-000012-00001	Platinum Company

User Lookup

You can use the User Lookup function in order to look up users on eServices under a specific policy and division.

- Select the admin tab at the top of the page.
- Select User Lookup

SECURITY ADMIN BUSINESS ADMINISTRATION ACCESS

[ADD NEW USER](#) [EDIT EXISTING USER](#) [USER LOOKUP](#)

USER LOOKUP

 (Please fill out the form and submit)

User ID:

OR

Last Name:

First Name:

E-mail Address:

- Enter the name of the person, their User ID if you know it, or their email address to locate the user. Click Search.
- You will get a list of all of the users that match.
- You can export this list to a PDF.

SECURITY ADMIN BUSINESS ADMINISTRATION ACCESS

[ADD NEW USER](#) [EDIT EXISTING USER](#) [USER LOOKUP](#)

USER LOOKUP

 (Please fill out the form and submit)


User ID:

OR

Last Name:

First Name:

E-mail Address:

 **Search results**

User ID	First Name	Last Name	E-mail	Update Access S-P-D	User Status
<input type="radio"/> XXXXXXXX	John	Doe	johndoe@johndoe.com	Y	Xxx-xxxxxx-xxxxx In-Active

Report: List of Users
Date: 08/03/2015
Report Generated By: John Doe
Selected Account: XXXXXXXX

User ID	First Name	Last Name	E-mail	Update Access	User Status
XXXXXXXX	John	Doe	johndoe@johndoe.com	Y	In-Active

Sign Out of the System

In order to successfully sign out of the system, select the Sign Out from your top navigation. This will end your session and return you to the main website.

