BENEFITS MANAGEMENT

Employer Services User Guide

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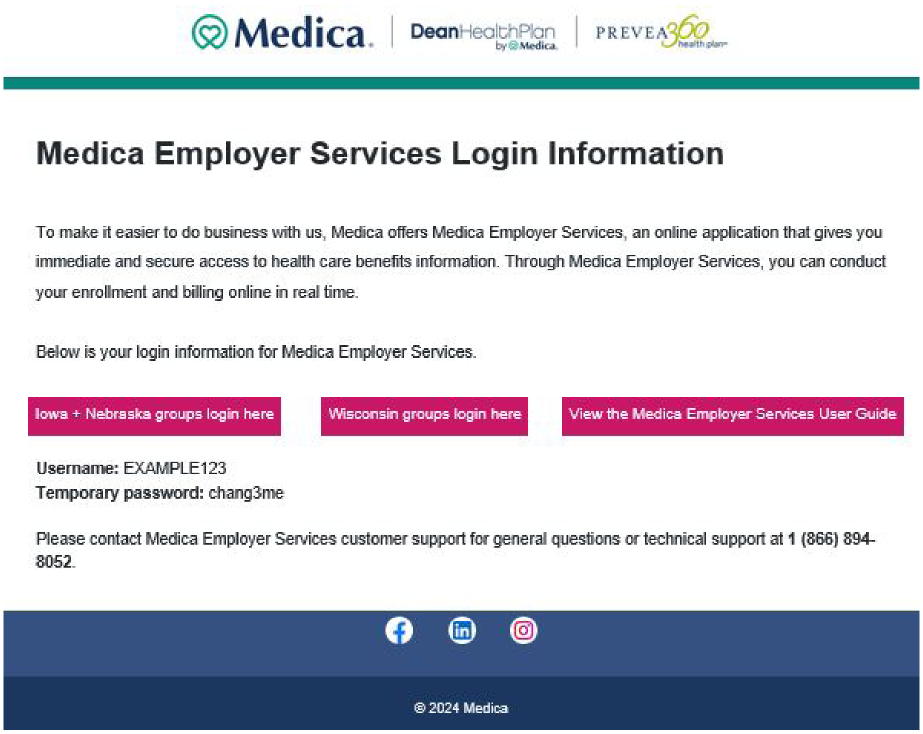
Introduction

Welcome! In this Employer Services User Guide, you'll discover how to manage your plan benefits for your employees. From enrolling new employees to paying an invoice, this guide details how to effectively administer your health plan.

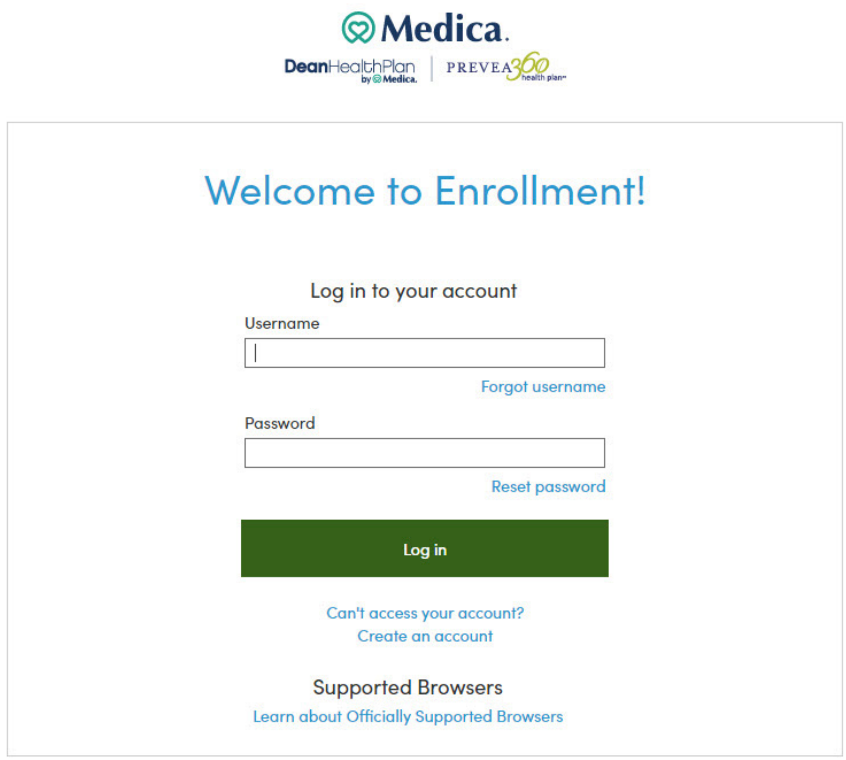
Sign in

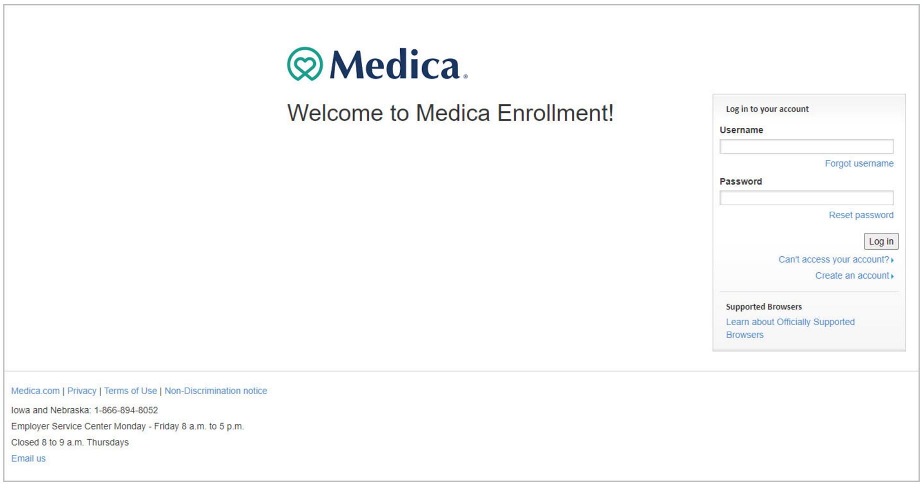
As soon as the group has been set up, we'll send you an email with your user name and temporary password. You can then set up your account and your password.



Sign in page

Depending on your group's location, you'll see one of these two sign in screens.



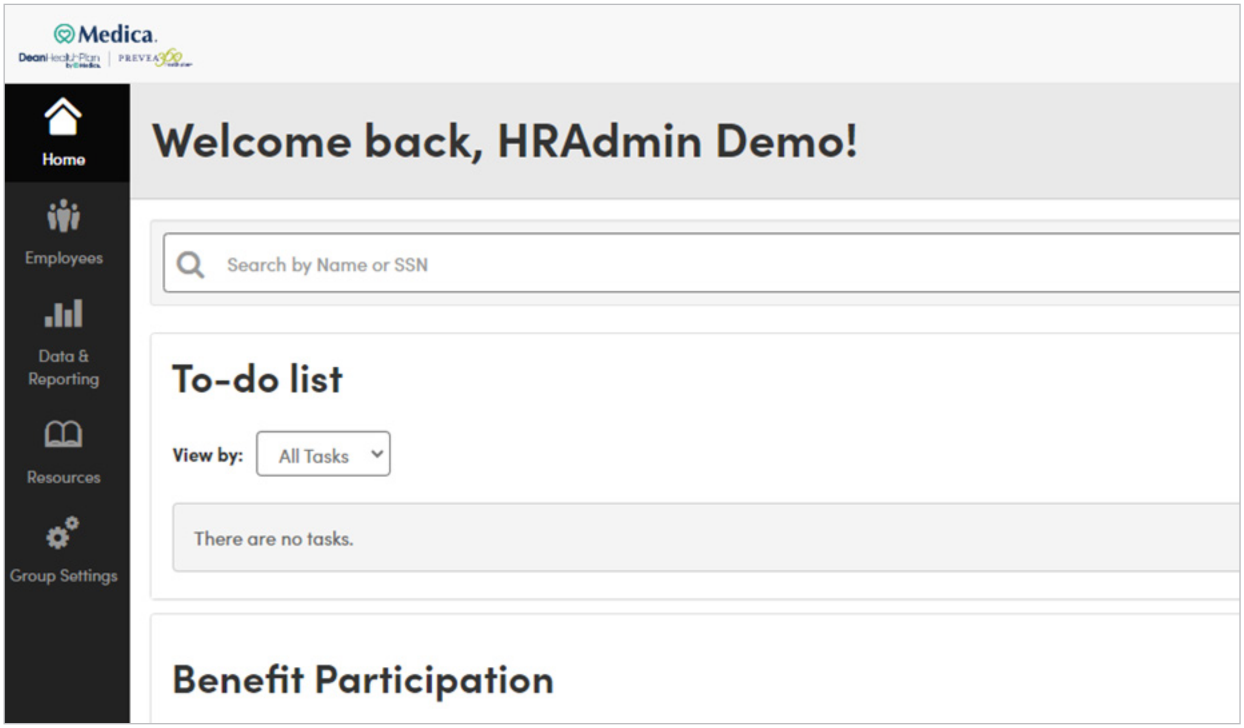


Home page

After signing in to your account, you'll see the home page.

To-do list

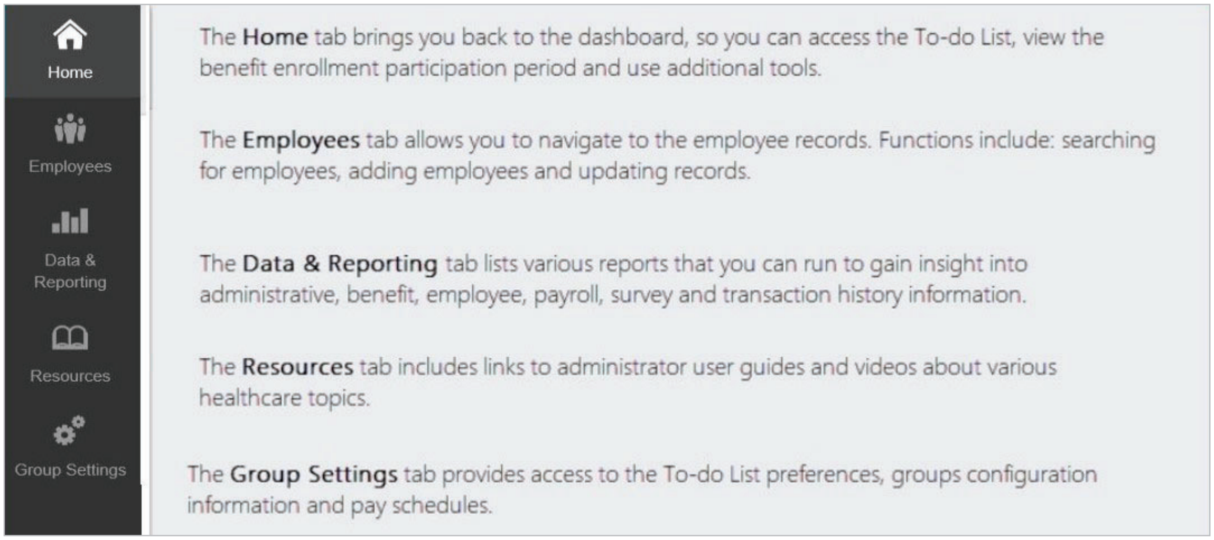
When an employee's record has missing information or important documentation, a task will appear in your **to-do list**. Located on the home page, this tool allows you to quickly and easily complete required tasks provided you have permission to do so.



It's important to stay on top of your **to-do** list tasks.

Navigation

From the home page, you can easily access key features and tools by selecting an option from the navigation bar on the left side of the page. Below is an overview of each tab's key functionality.



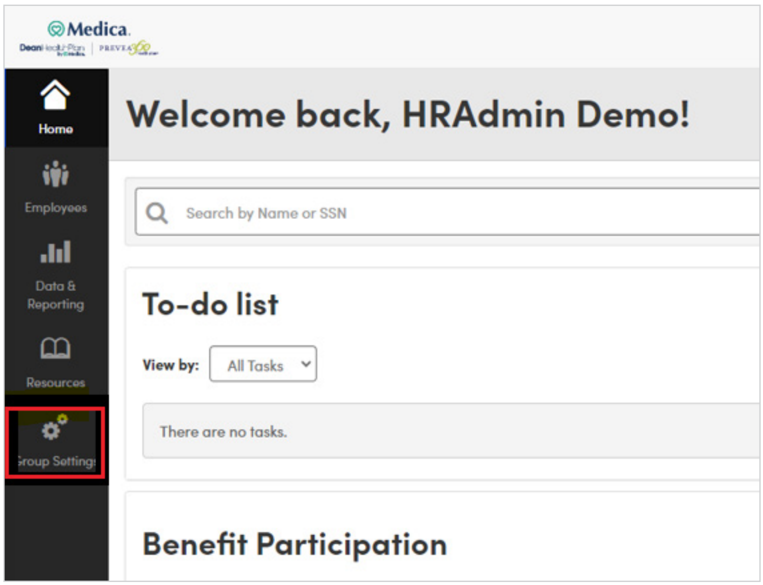
Creating additional users in enrollment

The main user for the group will be a designated Client Super User. The Client Super User has the ability to add additional accounts that will be able to sign in, view, and/or manage enrollments.

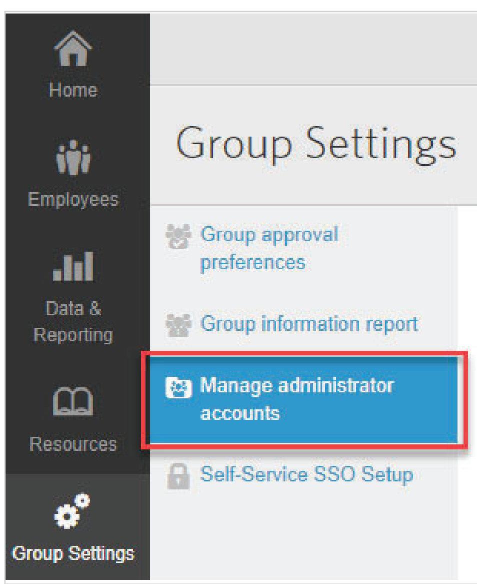
- A Client Restricted user can manage enrollments
- A Client View Only user can view reports and enrollment information

Adding and managing administrator accounts

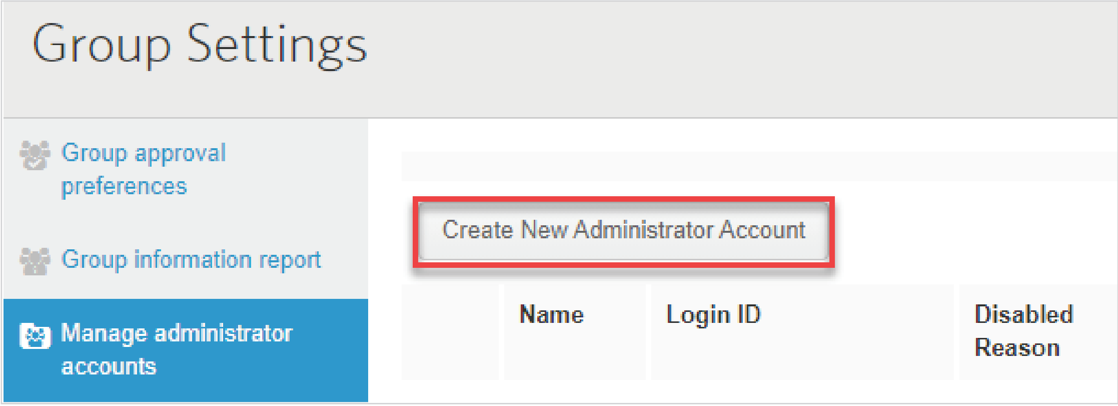
1. Access **Group Settings** from the home page



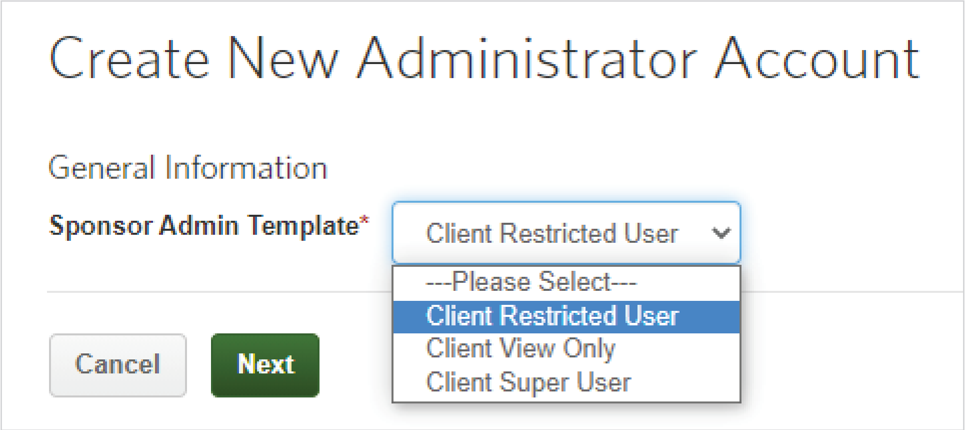
2. Once in Group Settings select **Manage administrator** accounts.



3. Select **Create New Administrator Account**



4. Select Role from the **Sponsor Admin Template** drop down menu



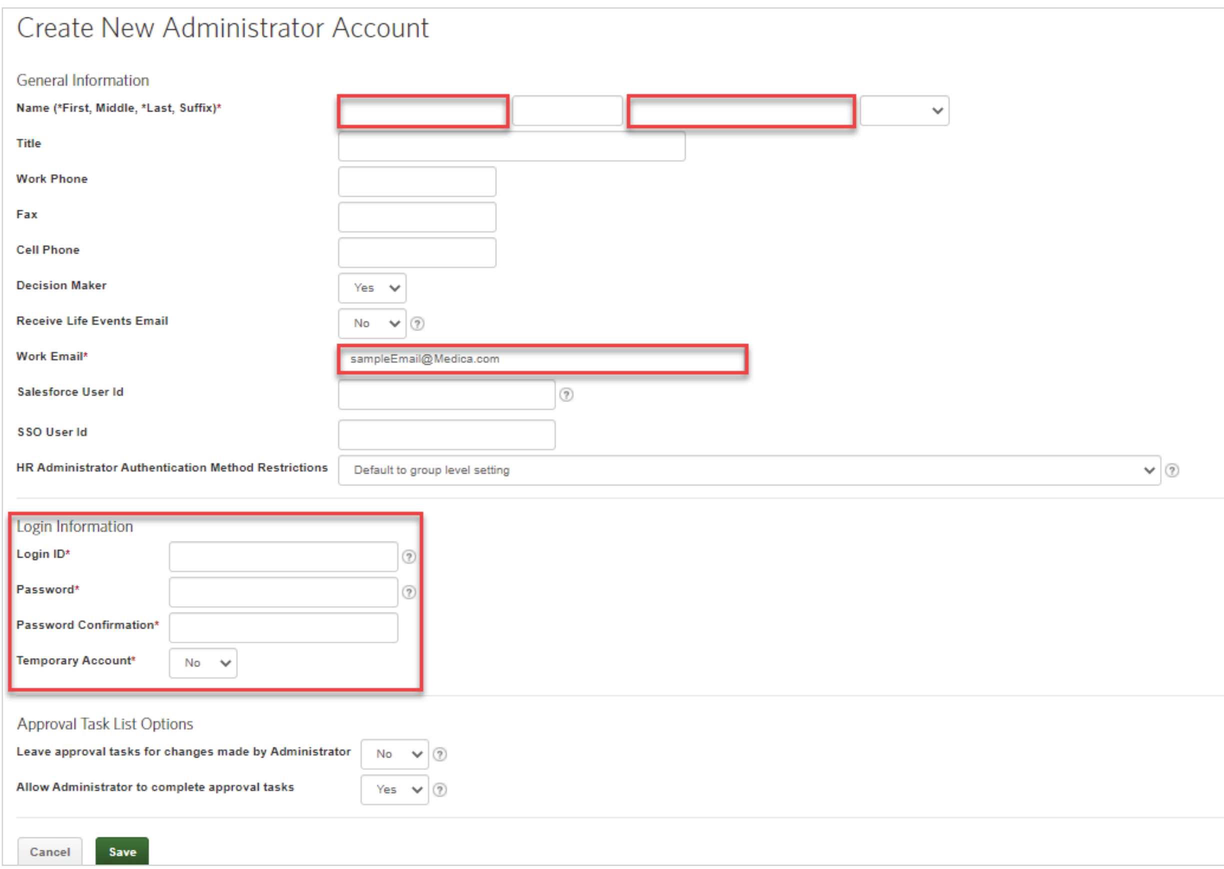
Reminder:

- A Client Restricted user can manage enrollments
- A Client View Only user can view reports and enrollment information
- A Client Super User can manage enrollments and agent/group users

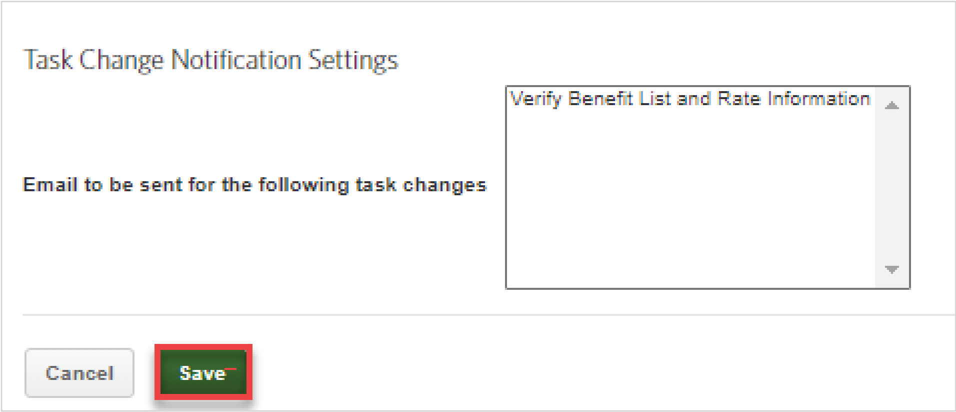
5. Once you have selected the **Admin Template**, complete the account details on the **Create New Administrator Account** page.

   The following information is required in order to save and create the account:

- **General information**
  - First Name
  - Last Name
  - Work Email
- **Sign in information**
  - Sign in ID (typically their email) (Must contain 8-24 characters, at least one letter, optional special characters: dashes, decimals, underscores, the @ symbol. It may not contain any spaces, special characters other than those referenced or the password).
  - Password
  - Password Confirmation
- **Temporary account** (Select **No** unless account should have a limited time to access the platform)
- **Approval task list options**
  - No changes should be needed in this section



6. The next screen is Task Change Notification Settings. You don't need to enter anything in this screen. Click **Save** to continue.



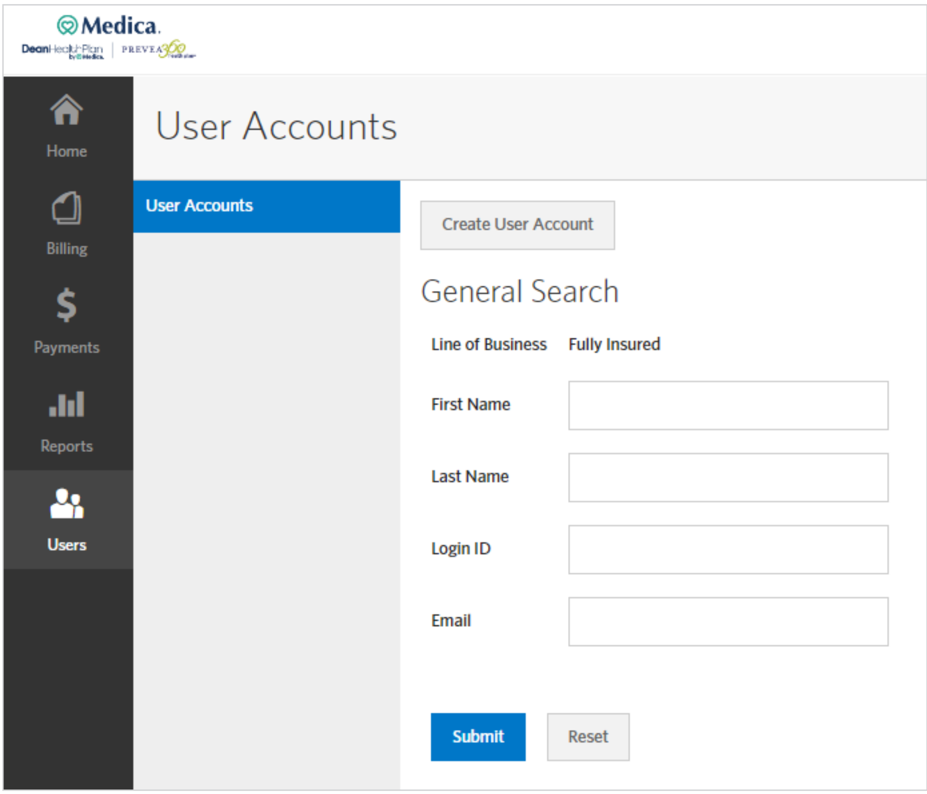
Creating additional users in billing

Client Super Users can add or manage user accounts on the **Users** tab to add access to the **Billing** section of the platform.

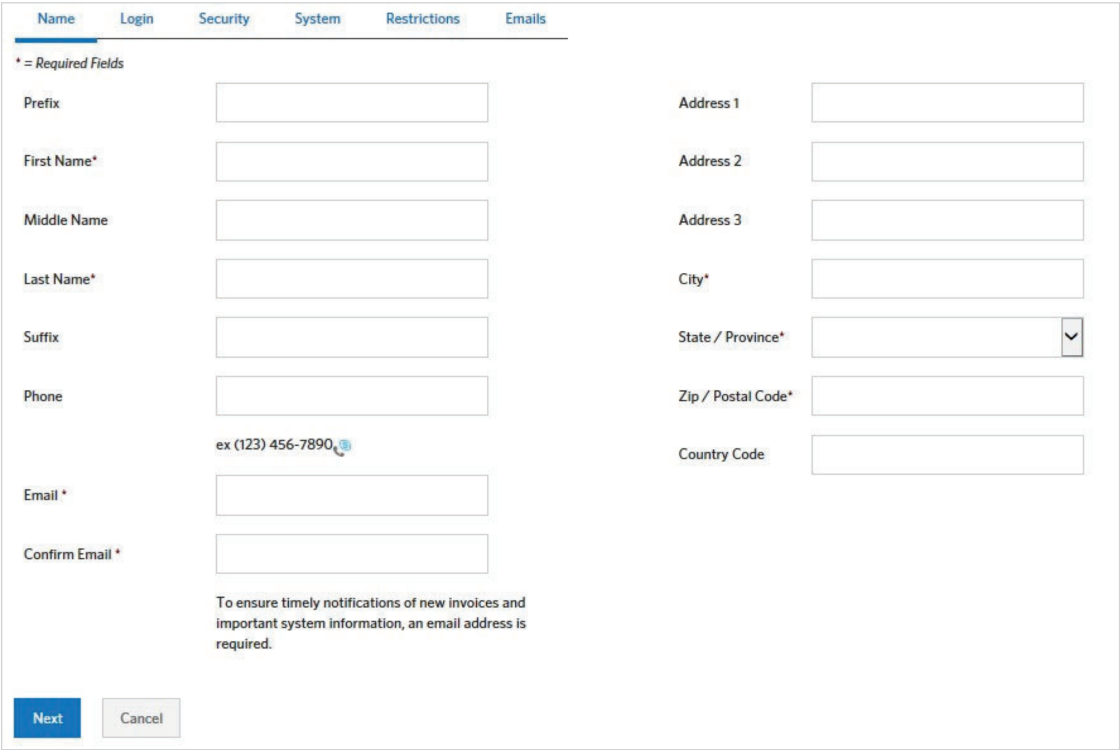
You can only add and view users with the same or lower permission level as you.

Creating a User Account

1. Click **Users** in the main navigation bar and the **User Accounts** tab will display
2. Click the **Create User Account** button

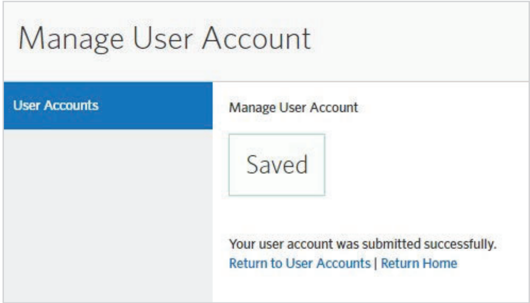


3. Enter the requested information on each of the tabs for the user account: **Name, Sign in, Security, System, Restrictions** and **Emails**. Required fields are indicated with an asterisk (*). Click **Next** after completing each tab.



- **Name tab:** Enter the user's demographics on this tab. If the user should receive emails, as configured on the emails tab, be sure to enter a valid email address for the user.
- **Sign in tab:** Click the help icon for **Username** and **Password** to view the username and password requirements. Ensure the **Enable Sign in** checkbox is selected to allow the user to sign in to the system.
- **Security tab:** Select the security profile(s) to be assigned to the user. This determines the features and functionality the user can access.
- **System tab:** If your group has access to more than one label system, select to determine which label system(s) the user should be able to access.
- **Restrictions tab:** If your group has more than one classification for invoices (for example, invoices are generated per location), select which invoice group(s) the user should be able to access.
- **Email tab:** Select what events should trigger an email notification to be sent to the email address entered for the user. For example, you may choose to receive an email when a new invoice is available.

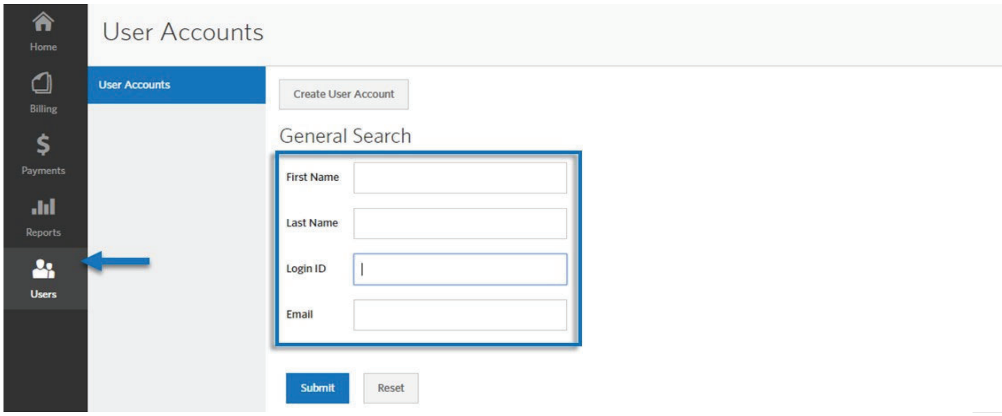
4. Click **Save** once all tabs are complete. You'll receive a confirmation message.



Editing a user account

To update a user's account information, complete the following steps:

1. Click **Users** in the main navigation bar and the **User Accounts** tab will display
2. Enter your search criteria for the user account and click **Submit**. To search for all users, click **Submit** without entering any criteria



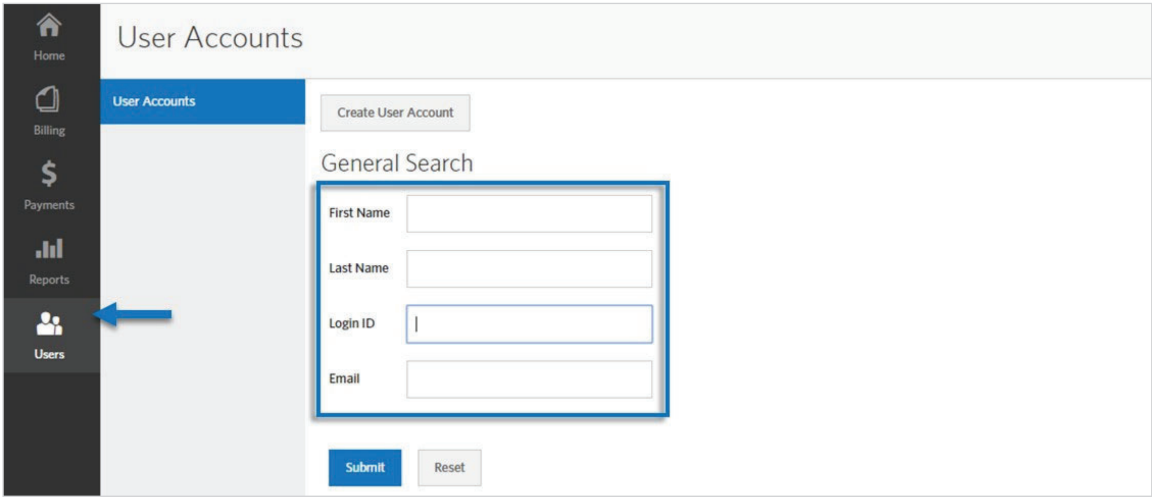
3. Click **Options**, then select **Edit User Account** for the account to be updated on the Search Results page
4. Navigate to any of the tabs you need to update
5. Click **Save** after making your changes

Cloning a user account

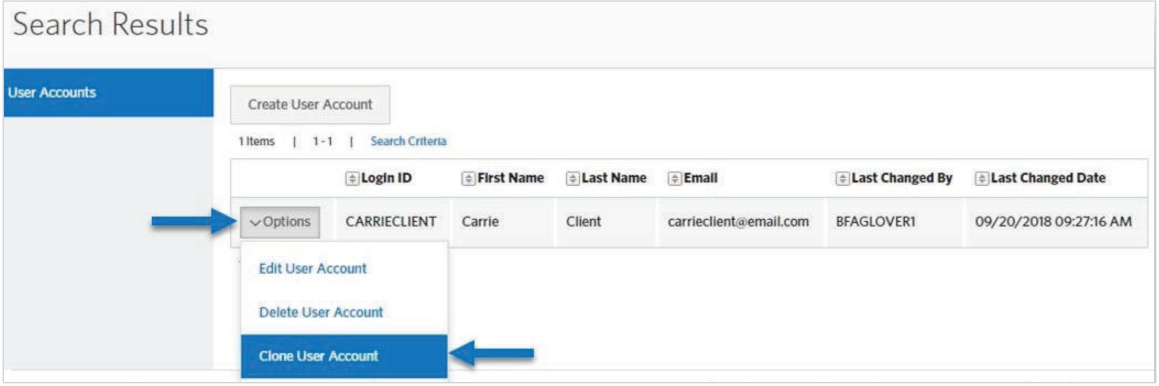
You can copy information from one user account to another to quickly add new users to the system. This is particularly useful if you need to create several users with the same permission sets.

Complete the following steps to clone a user account:

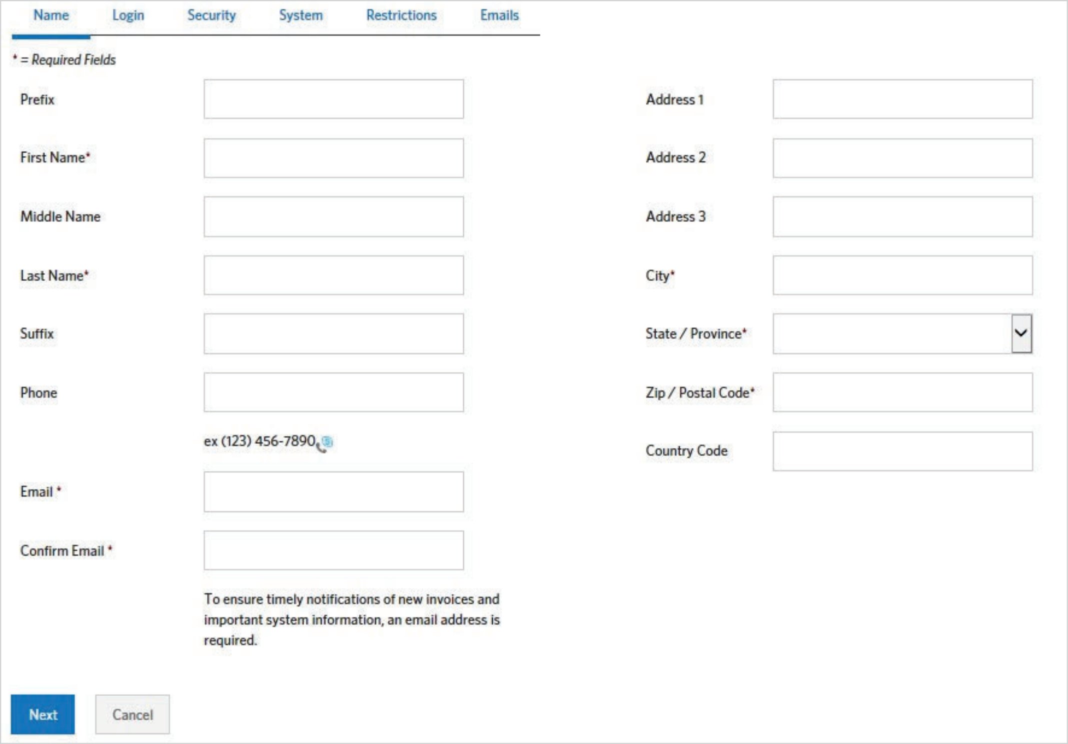
1. Click **Users** in the main navigation bar and the **User Accounts** tab will display
2. Enter your search criteria for the user account and click **Submit**. To search for all users, click **Submit** without entering any criteria (**NOTE**: you should clear the auto-populated date and reset to the date you are completing the task as the system will not allow a previous date)



3. Click **Options**, then select **Clone User Account** on the **Search Results** page for the account to be cloned



4. Enter the unique demographic information for the new user on the **Name** tab, then click **Next**

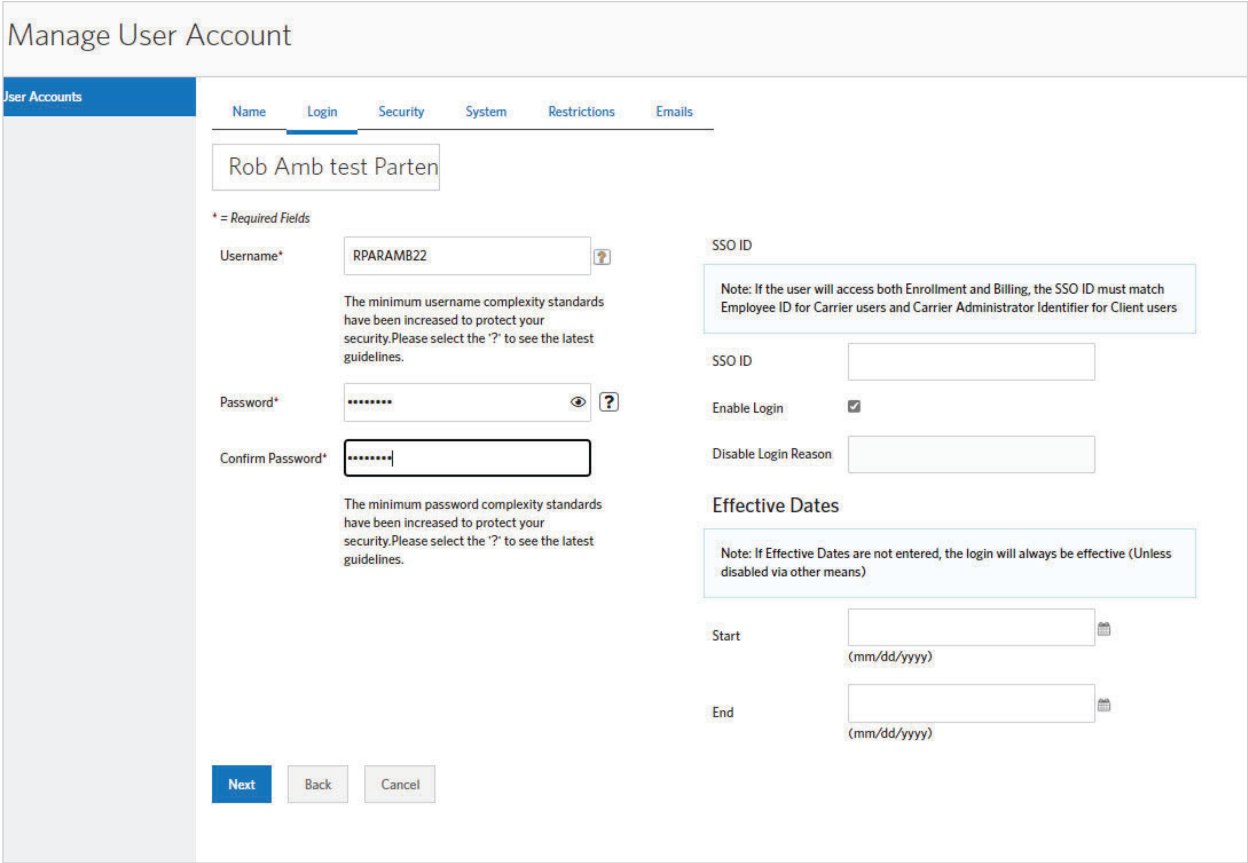


5. Enter the **Username** and **Password** for the new user on the sign in tab
    - Click the help icon next to the **Username** and **Password** fields to view the requirements for each
6. Update any additional information that should be updated on the remaining tabs (Information is copied from the previous user)
7. Click **Save** and you will receive a confirmation message

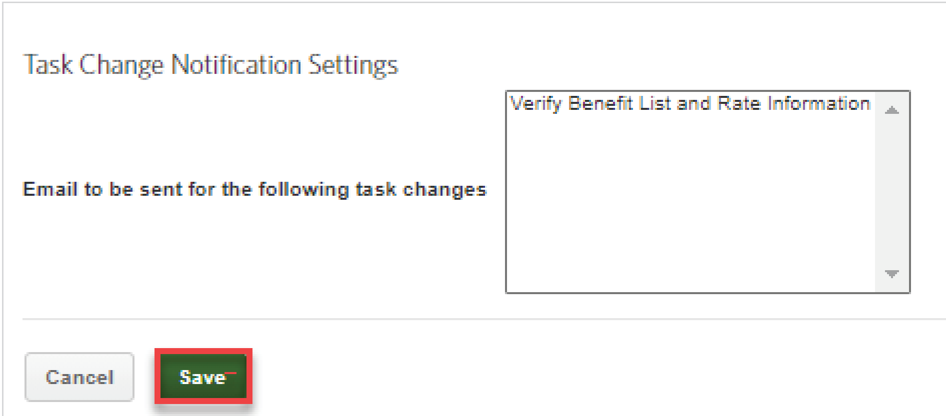
Navigation between enrollment + billing

When setting up users that have access to both enrollment and billing, we recommended setting up a Single Sign On (SSO) ID. This allows a user to transition from enrollment to billing with one sign in.

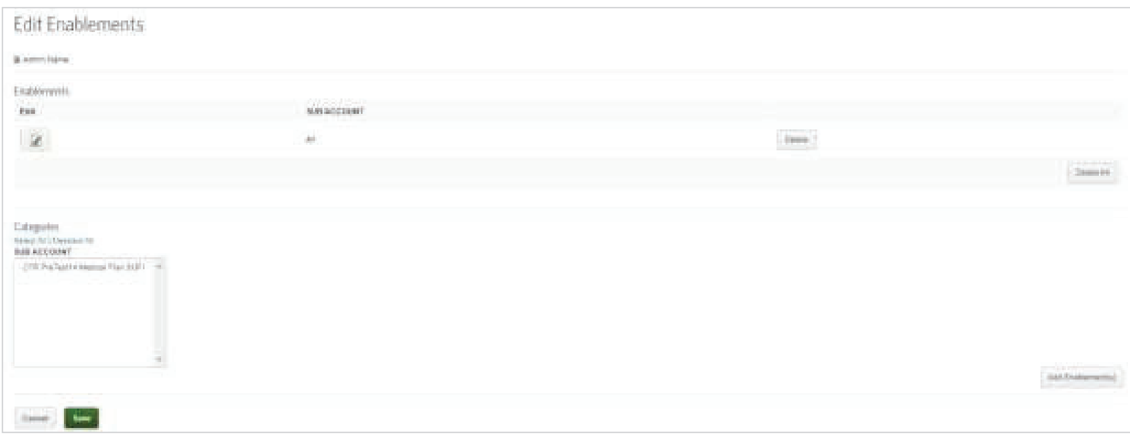
The Carrier Administrator ID (usually the user's email address) entered in enrollment should be entered in the SSO ID field in billing to link the two enrollment and billing account together.



1. **Task Change Notification Settings** – Nothing is needed here, just click **Save** to continue



2. If the **User** should only have access to a particular set of members within a group, there is the ability to breakout access by SUB ACCOUNT or DIVISION
   - If the **User** should have access to **ALL** members then you just **Save** to continue



3. Upon saving the **Enablements** page the **User** account should now be visible in the list of **Users** setup for the group

Updating your account settings

Update your user account settings to change your email, password and security questions. Security questions may be used for account validation in the future if you lose your username or password.

Follow the steps below to update your user account:

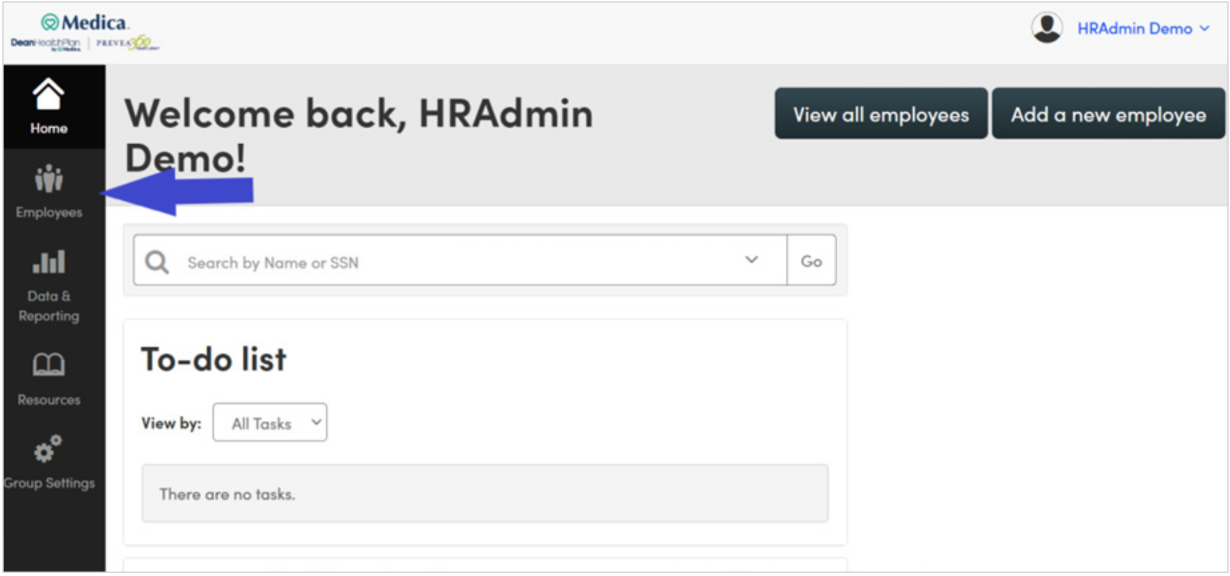
4. Click the **User Profile** menu in the upper right corner, and then select **My Account** and the **My Account Settings** page will display
5. Update your preferred email address, password and/or security questions as desired
6. Click the **Help** icon next to the **New Password** field to view password requirements (Be sure to enter a valid email address as this will allow you to receive system notifications)
7. Click **Save**.

Enrollment

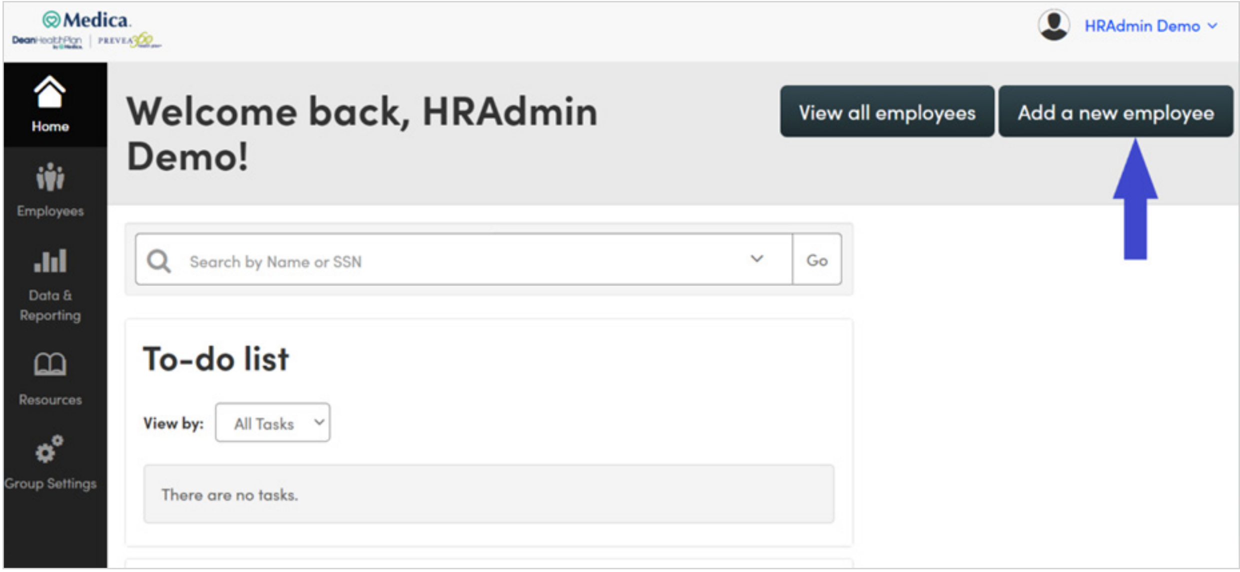
Adding a new employee

Follow the steps below to add a new employee:

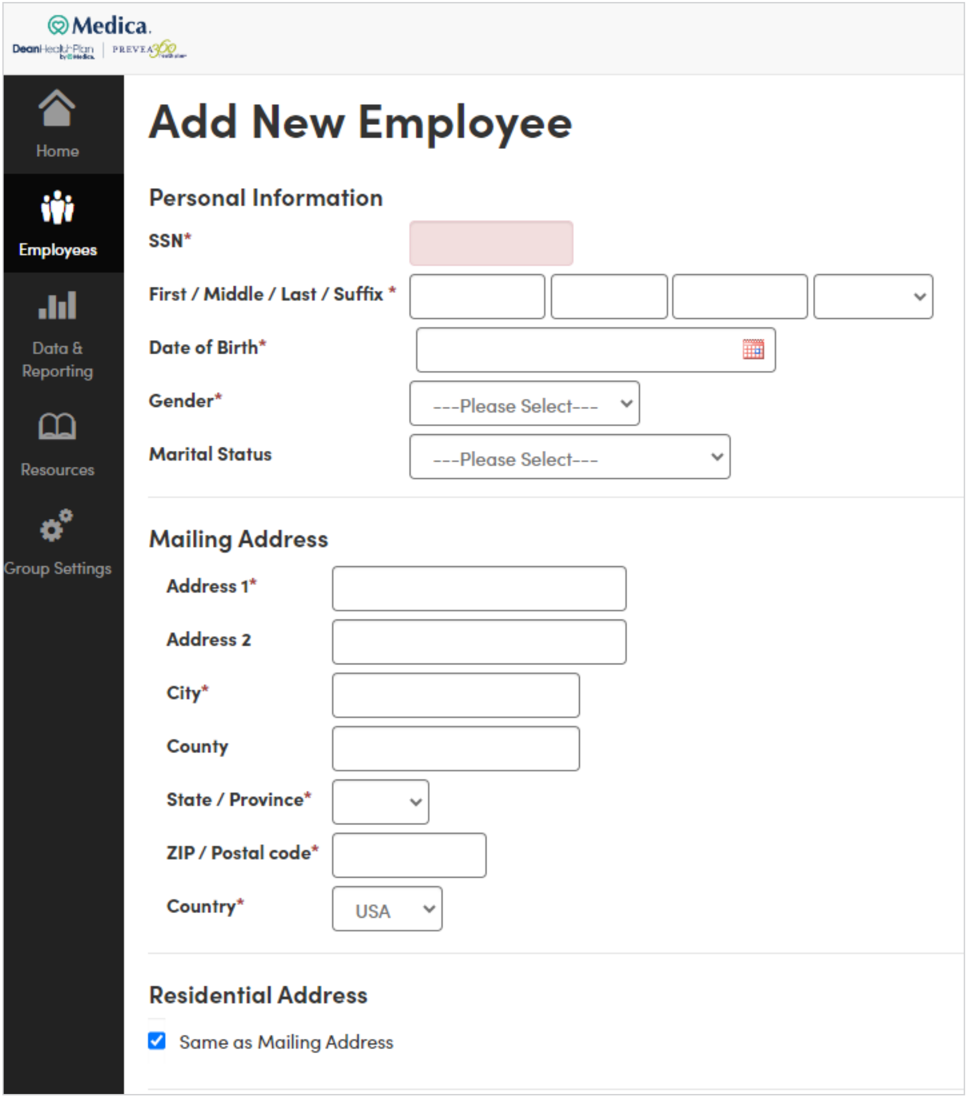
1. Select the **Employees** tab from the navigation bar



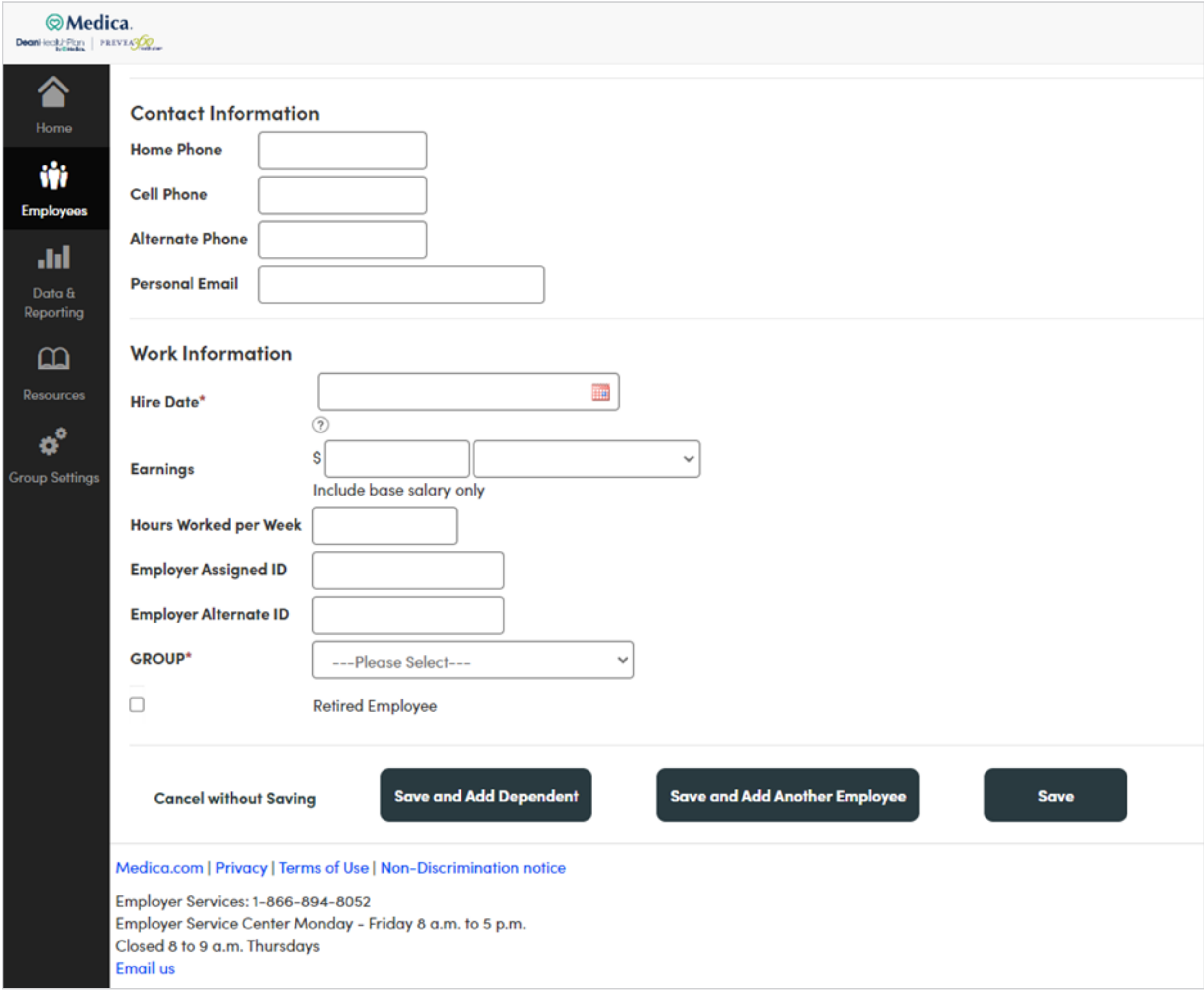
2. Click **Add a new employee**



3. Complete the **Personal Information** section by entering the employee data in the required fields (identified with an asterisk)



4. Complete the **Work Information** section by entering the employee data in the required fields (identified with an asterisk)



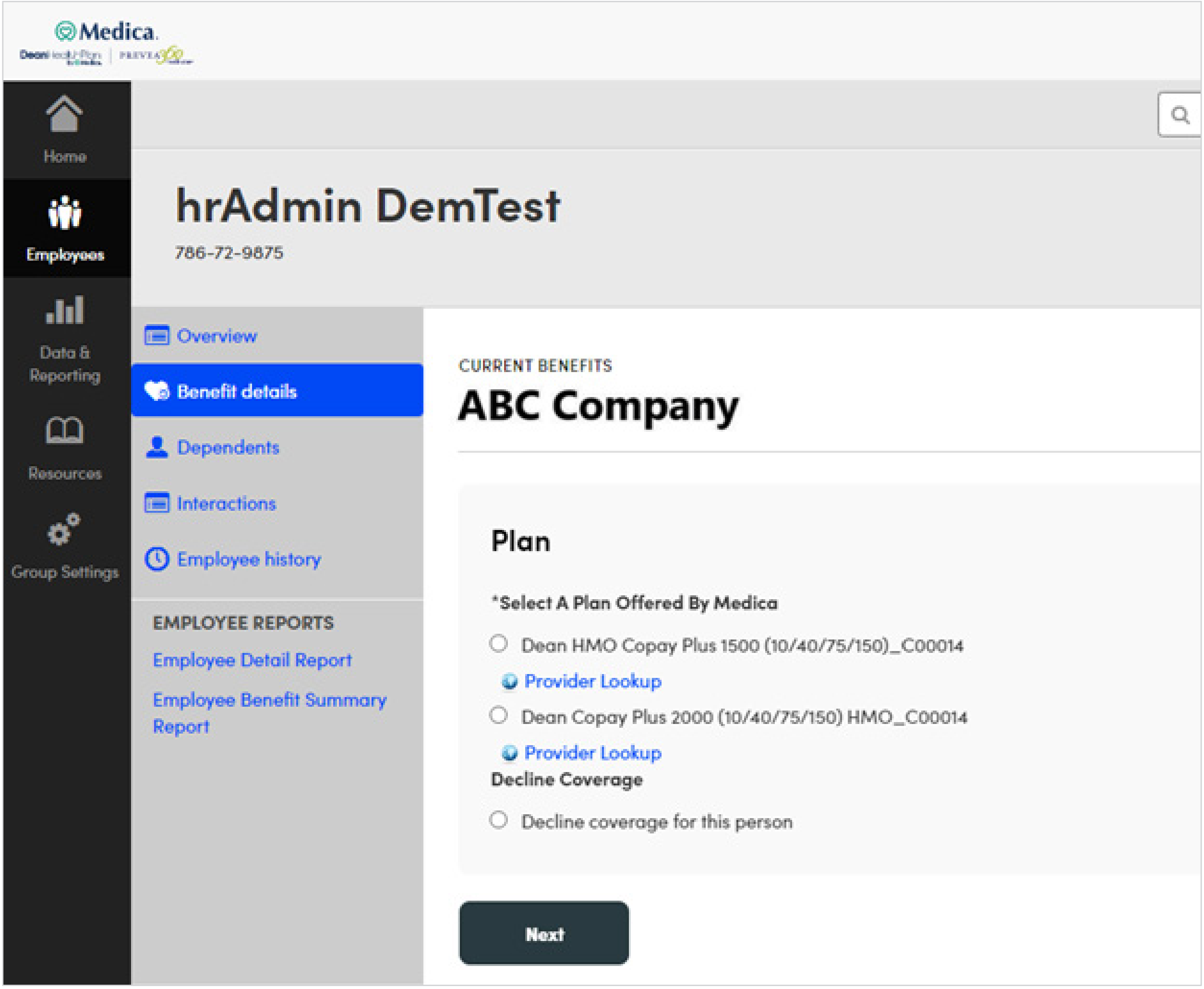
5. Click the appropriate **Save** button at the bottom of the page

Enrolling an employee in benefits

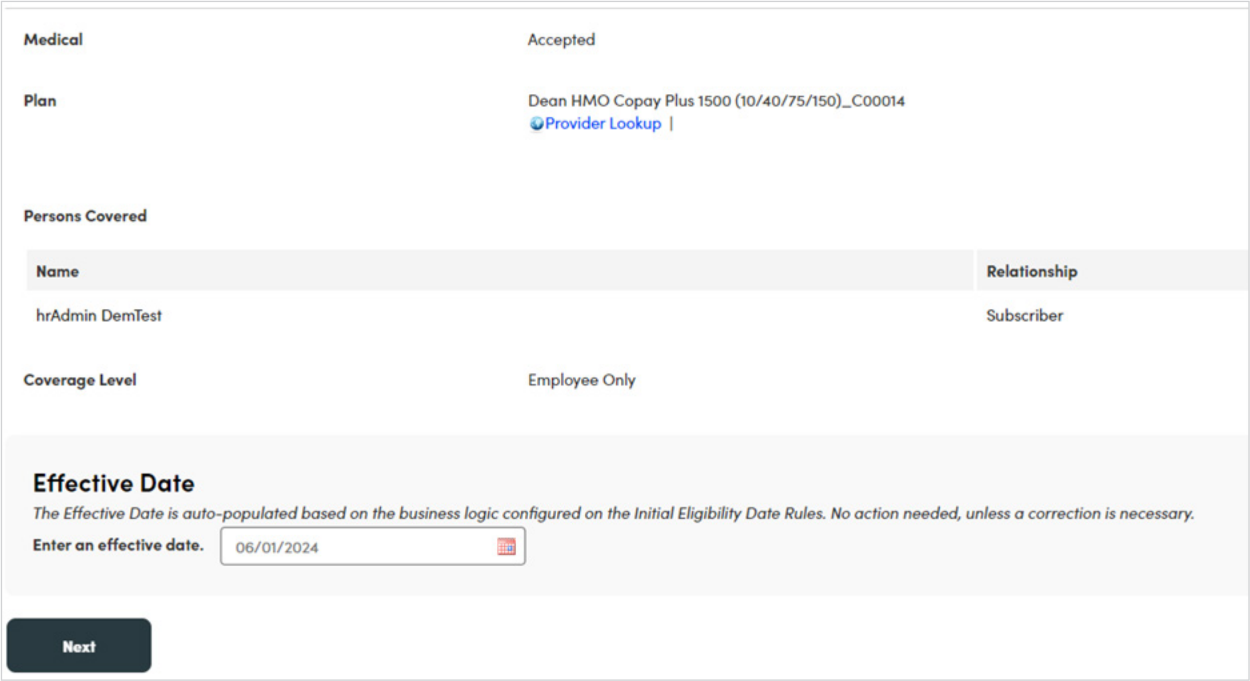
Electing benefits for an employee consists of a series of steps. The types of information that you will enter may vary depending on the employee, the type of benefit, and settings established for your group.

Follow the steps below to enroll an employee in medical coverage:

1. On the Current Benefits page, select the medical plan in which you are enrolling the employee, and click **Next** at the bottom of the page



2. The Coverage level is determined automatically if there are no Dependents added during this process. Verify or update the date in the Effective Date field and then click **Next**. The pre-populated date will be the first of the month following 30 days. **Important Note:** Adjust the effective date to align with your organization's eligibility rules.

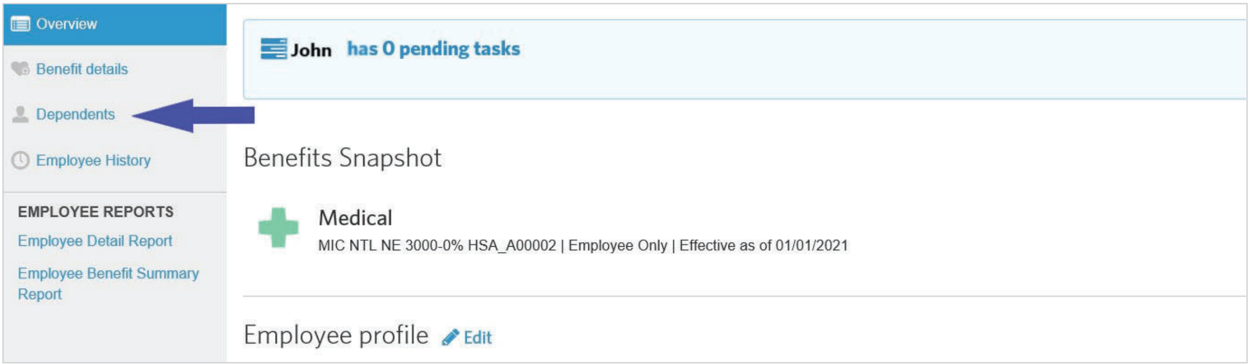


Adding a dependent

To add dependents use the employee's **Dependents** tab.

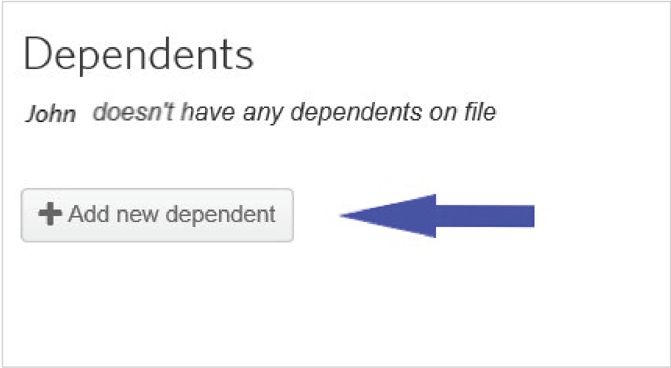
Follow the steps below to add a new dependent to an employee record:

1. Click **Add new dependent**

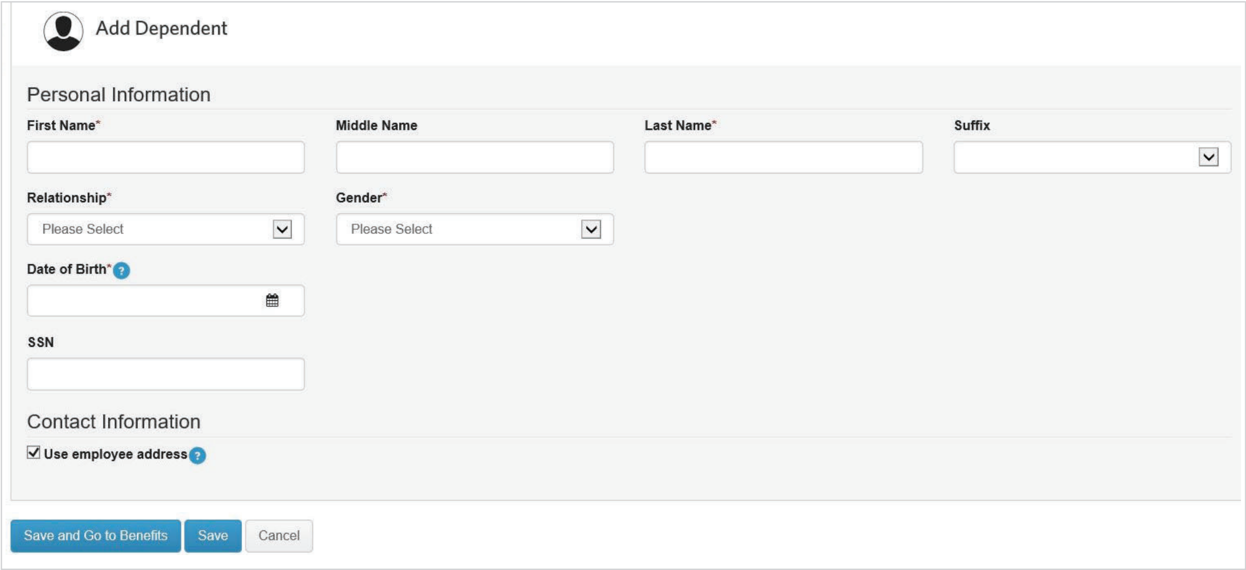


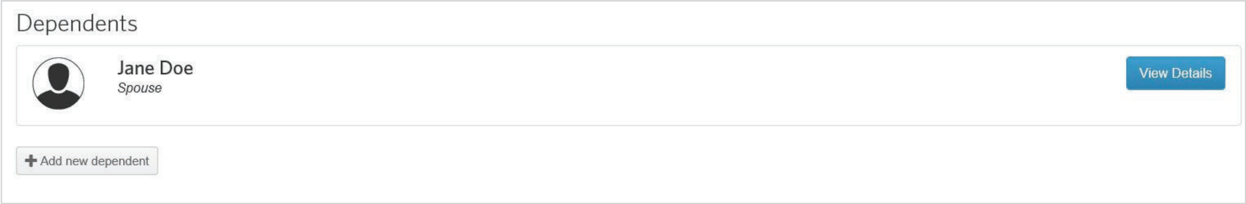
If the employee has at least one dependent on file, **Add another dependent** button will display.

2. Enter the dependent's demographic information



3. Click **Save** at the bottom of the page and the new dependent appears within the Dependents section

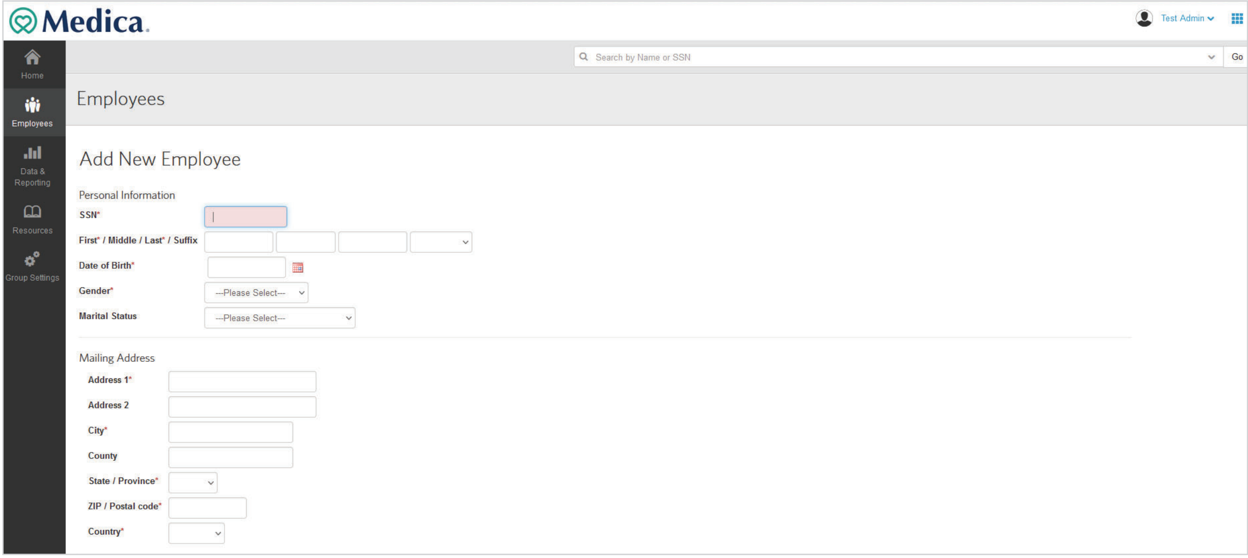




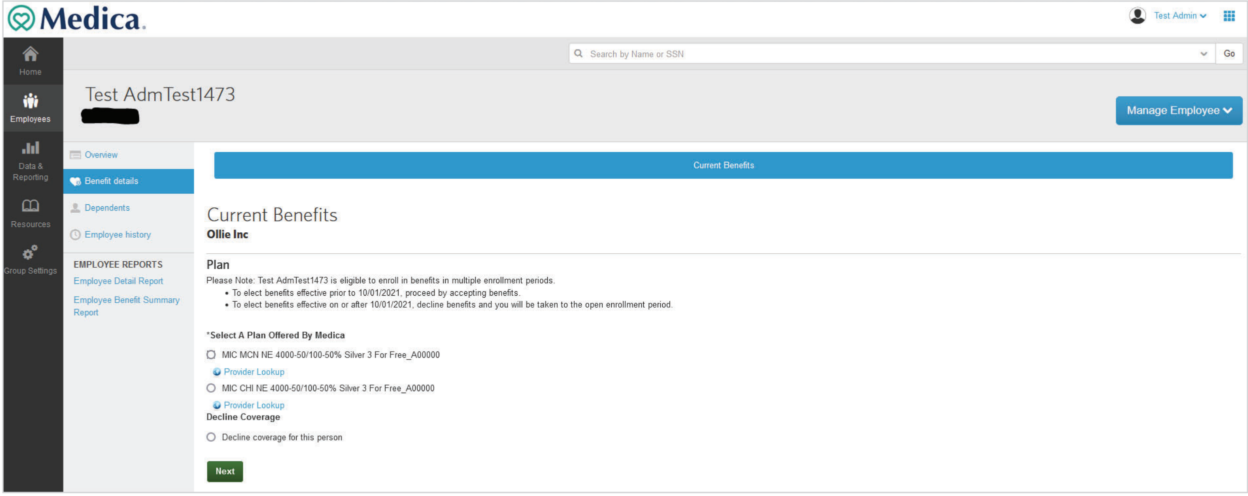
Add a new employee after set up for the next plan year

Example: You are enrolling an employee for a 10/1 employee coverage effective date, for a group renewing in January.

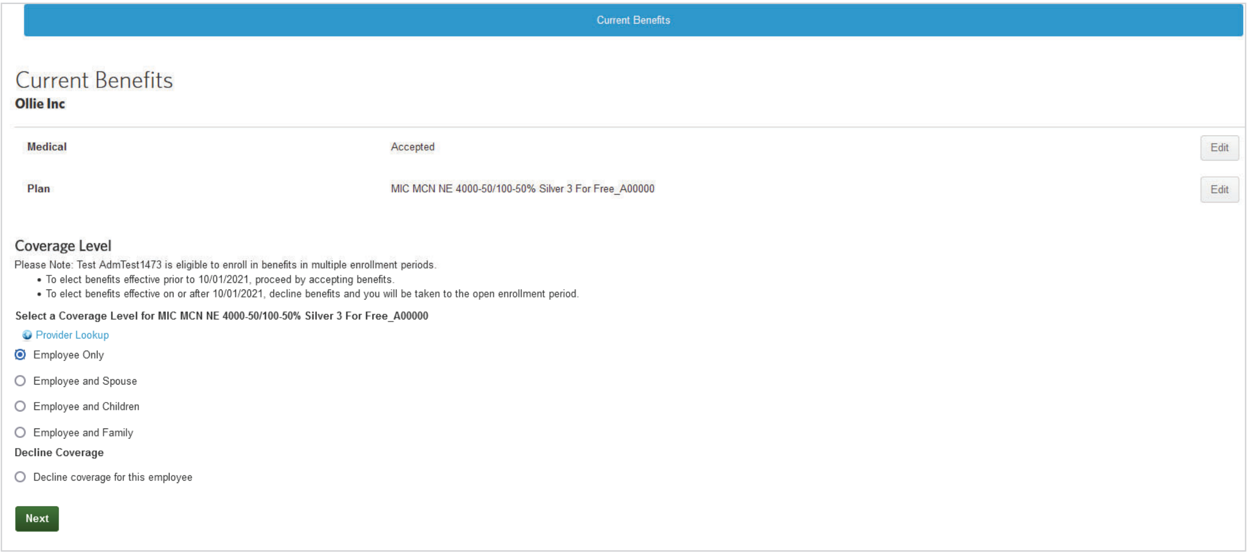
Follow the process to **Add New Employee**:



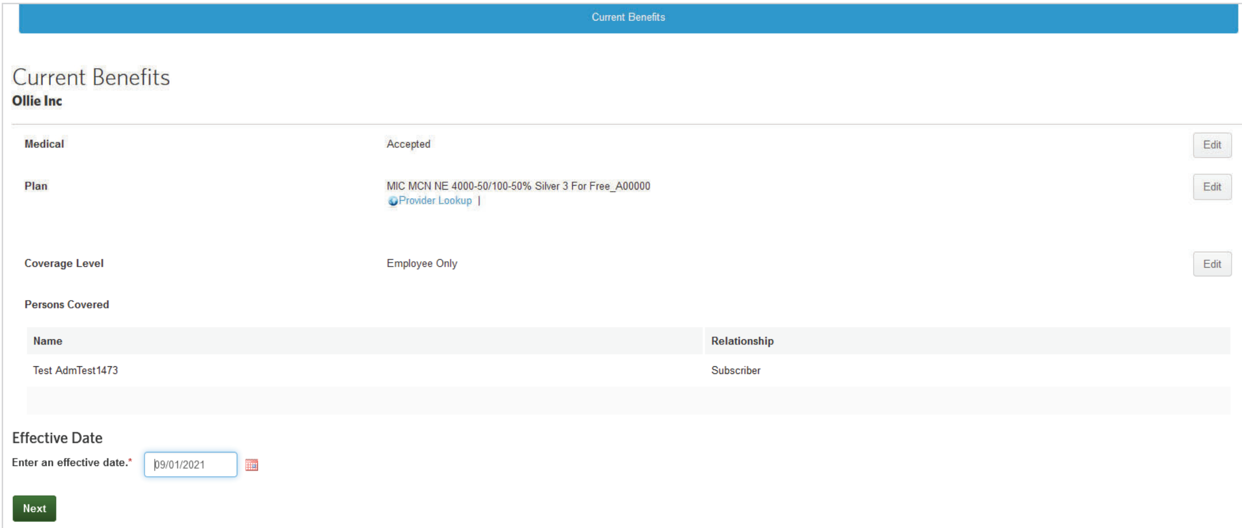
1. In the example of a 10/1 employee coverage effective date on a January renewal group you will automatically be taken to the below screen to select Current Benefits for the employee



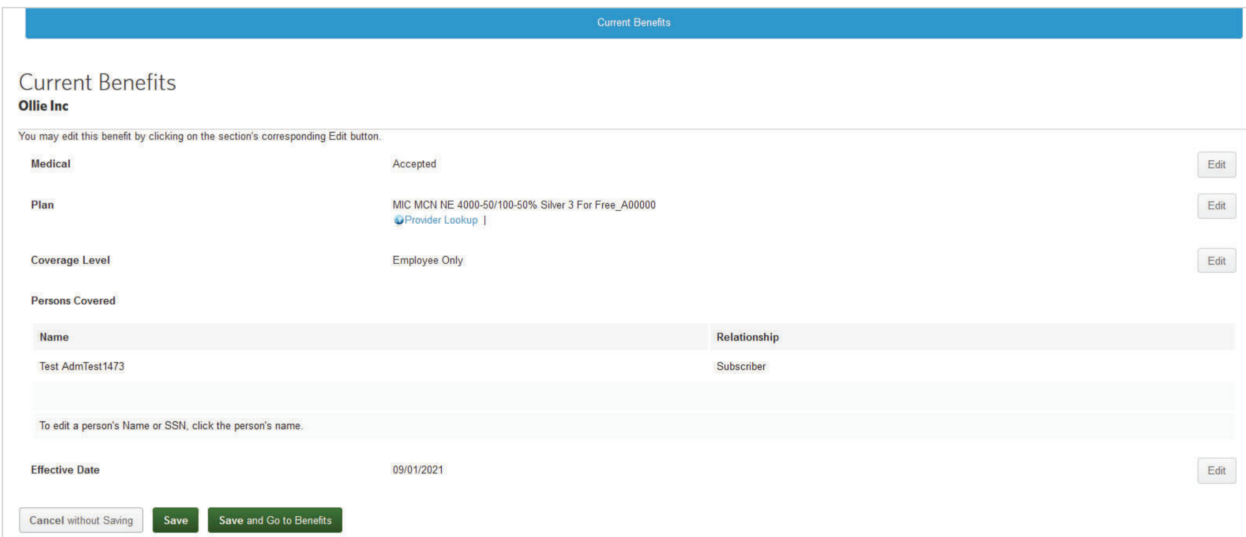
2. Select the **Coverage Level**, then click **Next**



3. Enter the **Effective Date**, then click **Next**

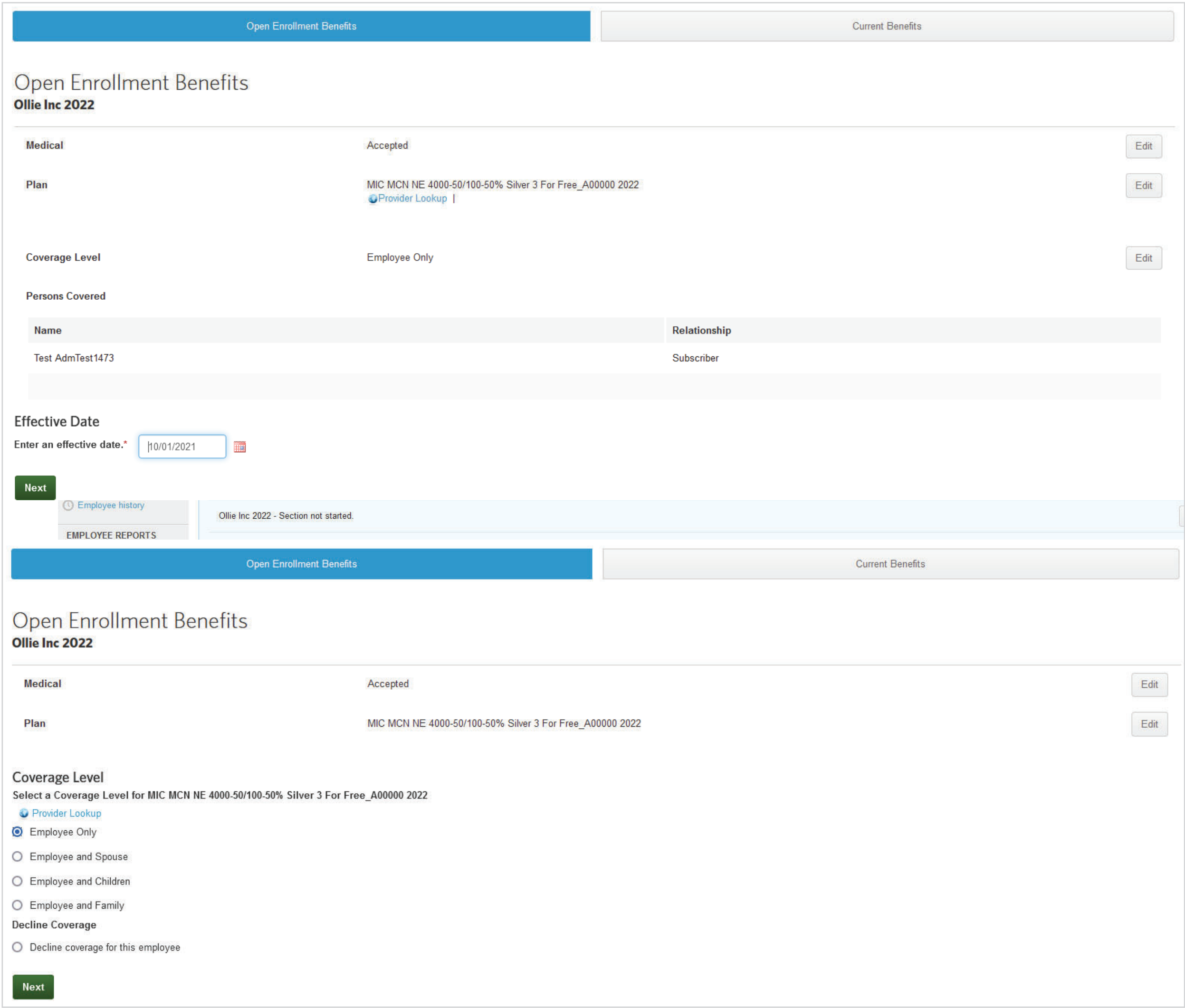


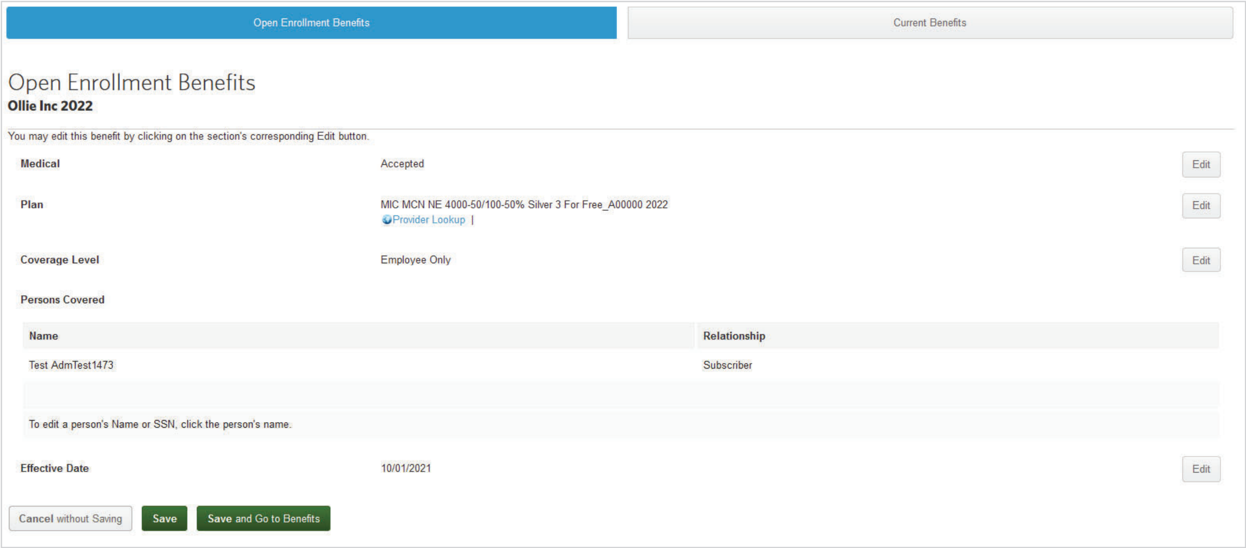
4. You will then see the **Current Benefits** tab to review. After the **Current Benefits** tab appears, review it, click **Save**, and **Go to Benefits**

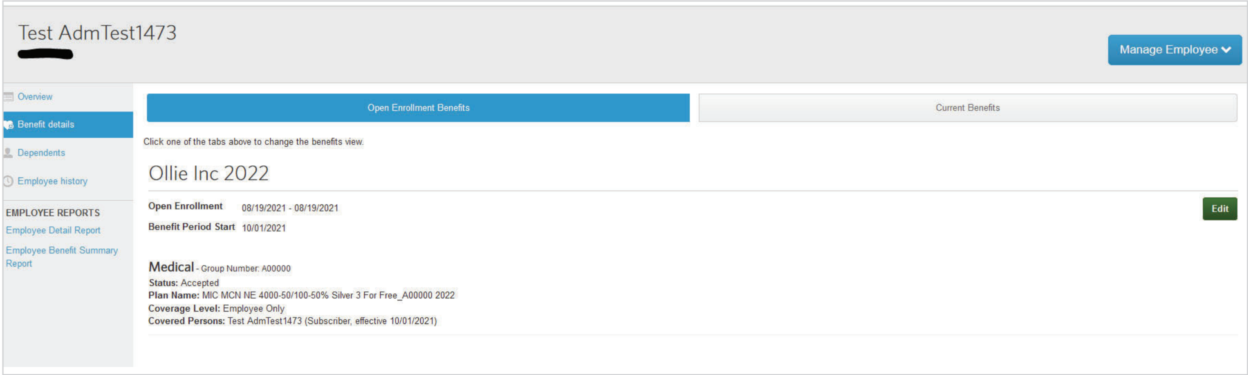


5. The Admin can click on **Open Enrollment Benefits** tab to elect coverage for the next year **OR** the Admin can click on **Overview**. This will create a pending task to complete enrollment for the following plan year.

6. The Admin could start next year's election from the **pending task list** or from the **Open Enrollment Benefits** tab. The rest of the process will be similar to selecting coverage for **Current Benefits**.



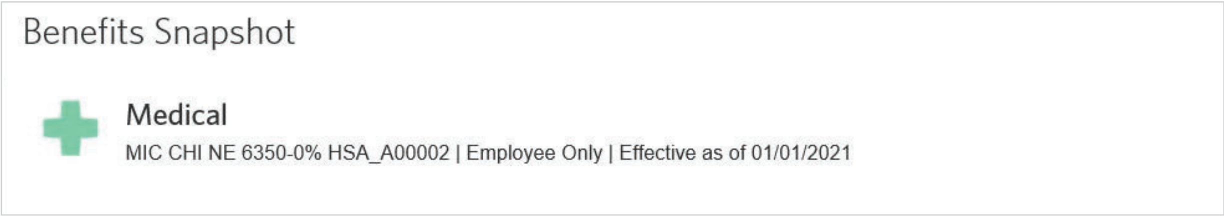




An employee will not be eligible to be added after the current participation period, based on the default eligibility rule, which is the first day of the following month. In that case, you will be taken to the **Open Enrollment Benefits** tab to elect coverage for the next plan year for the employee, rather than needing to elect current benefits.

Viewing benefit details + eligibility

The **Benefits Snapshot** on the employee record **Overview** tab provides basic benefit information.



Administrators are able to view and make changes to employees' benefits at any time. To do so, click the **Benefit Details** tab within the employee record.

On the **Benefit Details** page, you can see:

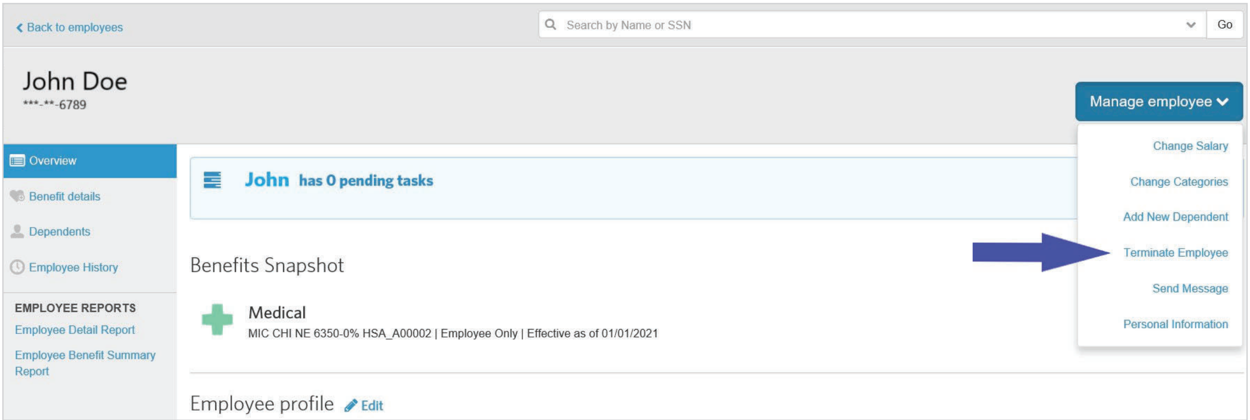
- All benefits available to the employee, including the benefits the employee has accepted or refused
- Benefits that need to be started

Terminating an employee

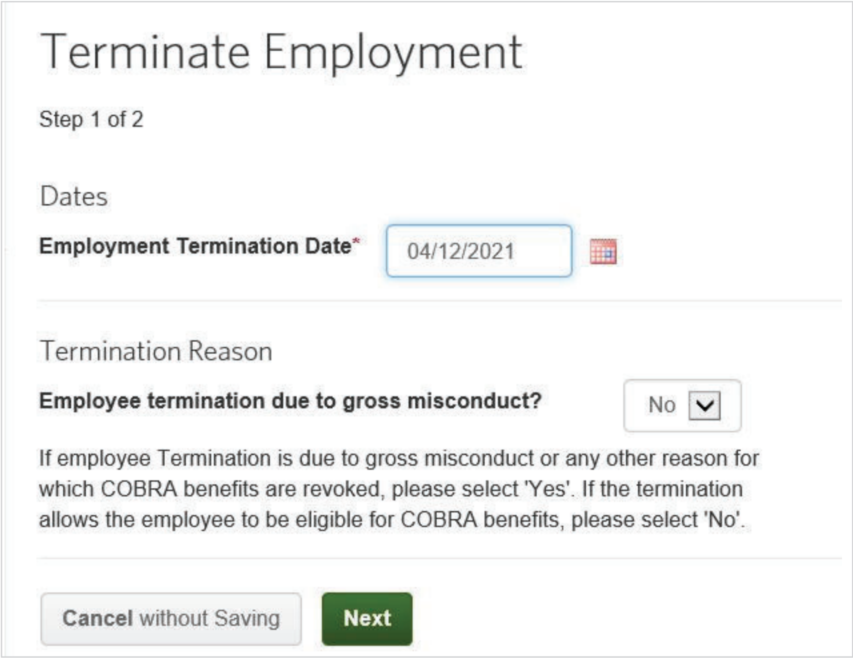
Terminating employment changes the status of the employee form **Active** to **Terminated** and also cancels all benefits for the employee.

Follow the steps below to terminate an employee:

1. From the **Manage employee** drop down menu, select **Terminate Employee**



2. On the Terminate Employment page, enter the employment termination date for the employee in the **Employment Termination Date** field
3. In the Termination Reason section, provide an answer to the "**Employee termination due to gross misconduct?**" drop-down menu



4. Verify the pre-populated benefit cancellation date for each benefit available is correct and click **Save**

   After terminating an employee, the following menu options may appear depending on the configuration for your group:

   - **Undo employee termination:** Select this option to revert the termination and reinstate the employee record as it was prior to the termination date. It is best to use this reinstatement option when someone has erroneously terminated the employee.
   - **Rehire employee:** If the employee is rehired at a later date, select this option to reinstate his or her record. Upon the rehire date, the employee will be able to enroll in benefits based on the rules configured for your group.

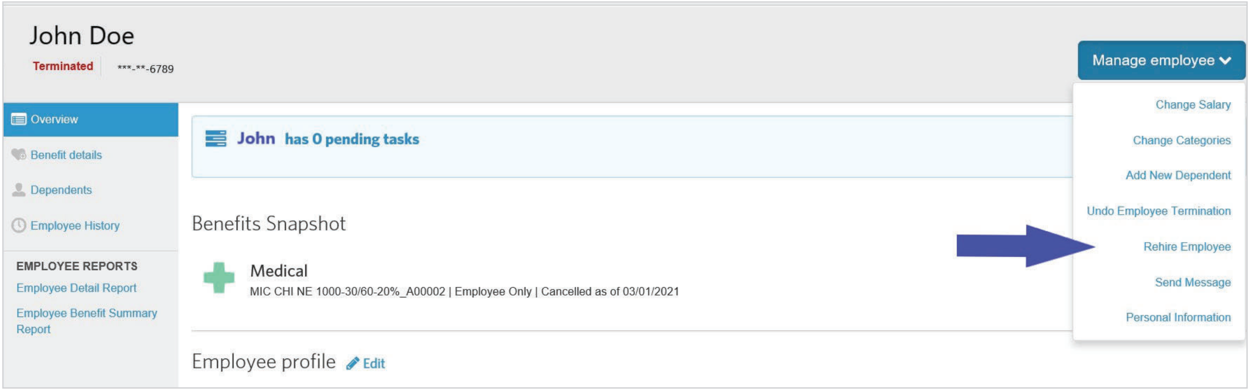
Rehire an employee

Once employment is terminated, employees can be rehired, and their benefits can be reinstated. Four options are available for rehiring previously terminated employees:

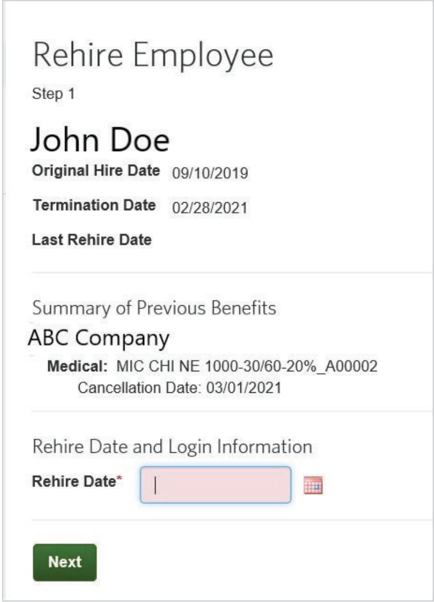
1. Reinstate an employee's benefits as if the employee was never terminated
2. Reinstate an employee's benefits with no lapse in coverage
3. Reinstate an employee's benefits without a waiting period
4. Reinstate an employee's benefits with a waiting period

Follow the steps below to rehire an employee:

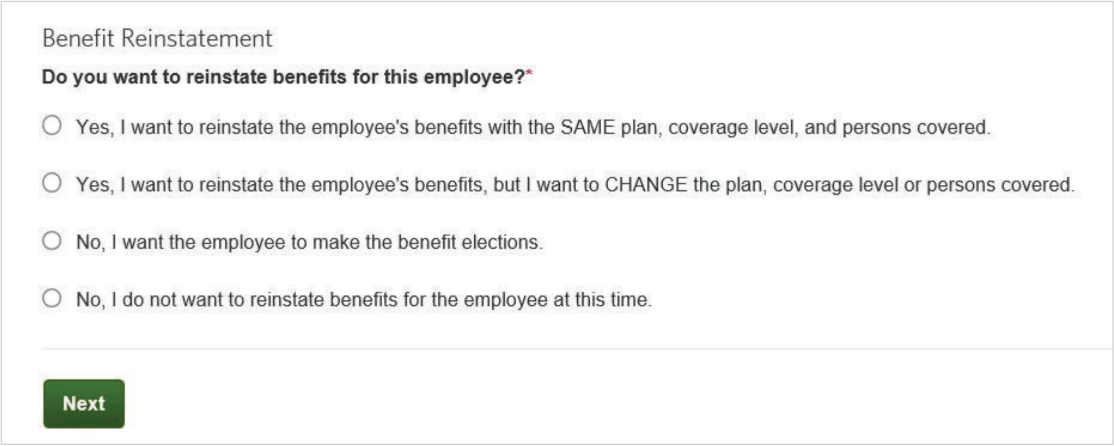
1. Select **Rehire Employee** from the **Manage employee** drop-down menu



2. Enter the employee's rehire date in the **Rehire Date** field



3. Select the appropriate **Benefit Reinstatement** radio button and click **Next**
   - Selecting **Yes, I want to reinstate the employee's benefits with the SAME plan, coverage level and persons covered** will automatically reinstate the employee's benefits with the applicable effective date
   - Selecting any other option will rehire the employee, but benefits will not be reinstated so either you or another administrator must re-enroll the employee in benefits after you complete the rehire process



4. Review the summary of benefits list with the new coverage dates and click **Next** if everything is correct
5. Click **Save**

COBRA administration

We recommend terminating an employee from the plan immediately, rather than waiting until they have made their COBRA election.

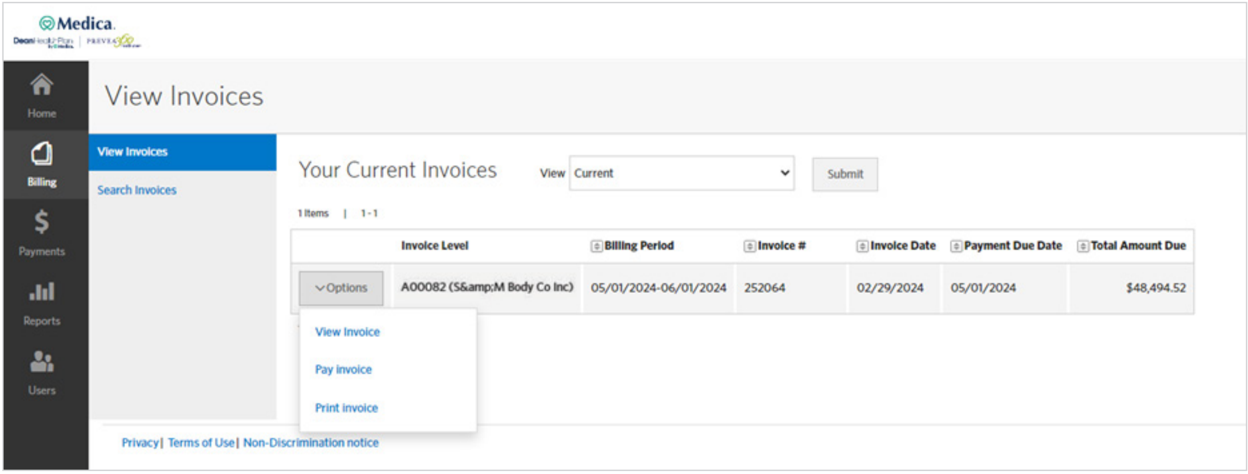
Once the employee and/or their dependents have elected COBRA coverage, use the following steps:

1. Search for **Employee/Former Employee**
2. Click on **Name**
3. Click **Manage Employee/Undo Employee Termination**
4. Review current information
5. Click **Undo Termination** button
6. Click **Return To Employee Profile**
7. If you have **Categories** that separate *Active* from *COBRA* participants, click **Edit** next to the **Categories** section.
8. Enter the **Effective date** of the change
9. Pick the new **Category** from the dropdown
10. Click **Next**
11. Review info for accuracy and click **Save**

If the employee isn't electing COBRA coverage but the dependents of the terminated employee are electing COBRA, enroll the dependents on a new policy of their own, as if they were an employee. Follow the same steps as adding a new employee in the enrollment section.

Billing + payments

This section provides information on the basics of working with the Billing and Payments application. By default, your most recent invoices are displayed on the home page. You can view additional invoices and invoice information on the **Billing** tab, which also enables you to search for invoices and adjustments.



Viewing invoices

You can search for invoices by an invoice status:

- **Current** invoices belong to the current coverage period
- **Prior** invoices belong to a previous coverage period

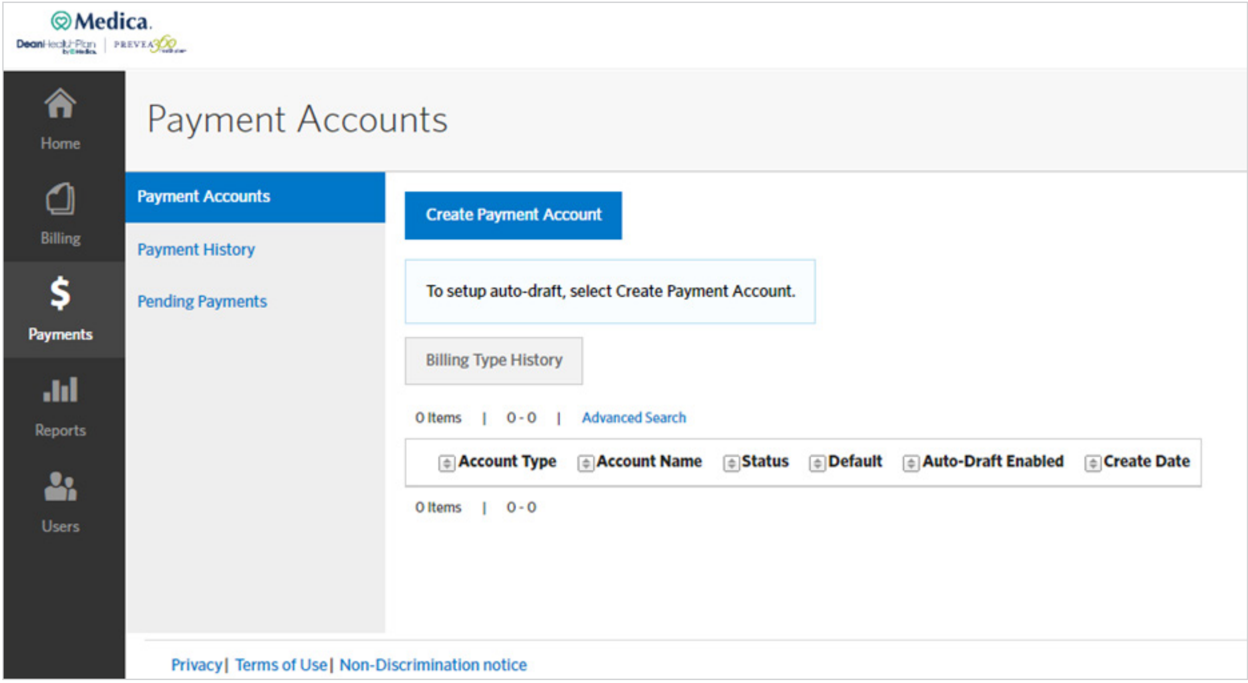
The **View Invoices** page provides you with at-a-glance visibility into your invoices. This page provides a list of invoices matching the selected search and filtering criteria, along with high-level information such as:

- Billing period
- Invoice number
- Invoice date
- Due date
- Total due

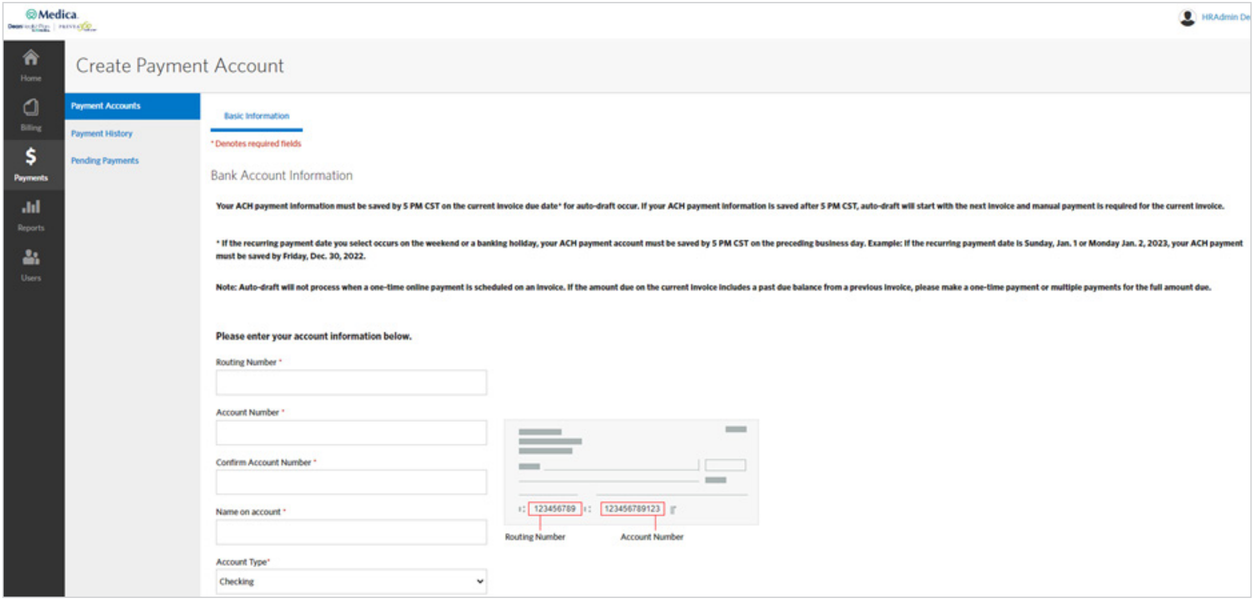
Creating a payment account

To set up your bank account for Automatic Clearing House (ACH) payments, from the Payment Accounts page:

1. Click **Create Payment Account**

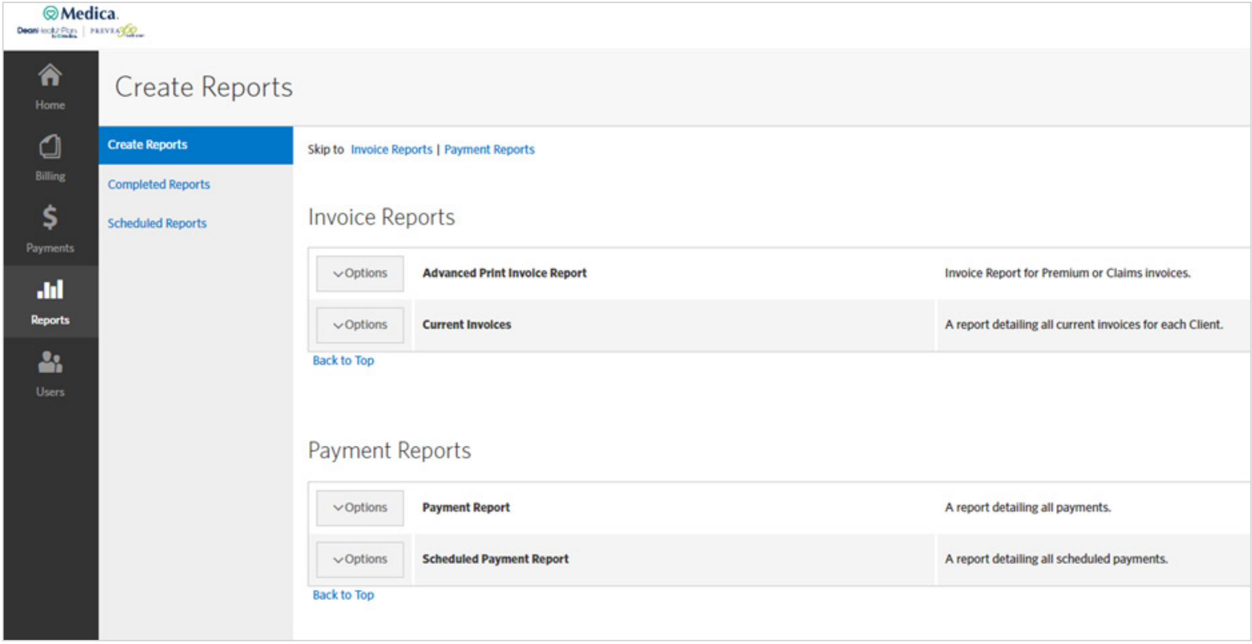


2. Enter the payment account details



Downloading invoices

To download invoices go to the **Create Reports** tab and select **Advanced.** This will allow you to download your invoice.

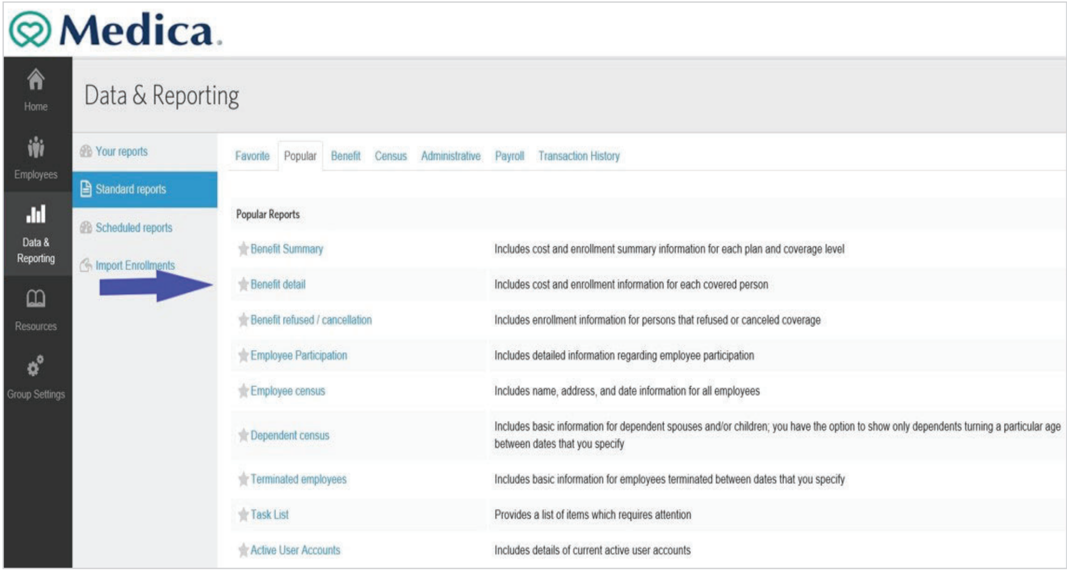


Reporting

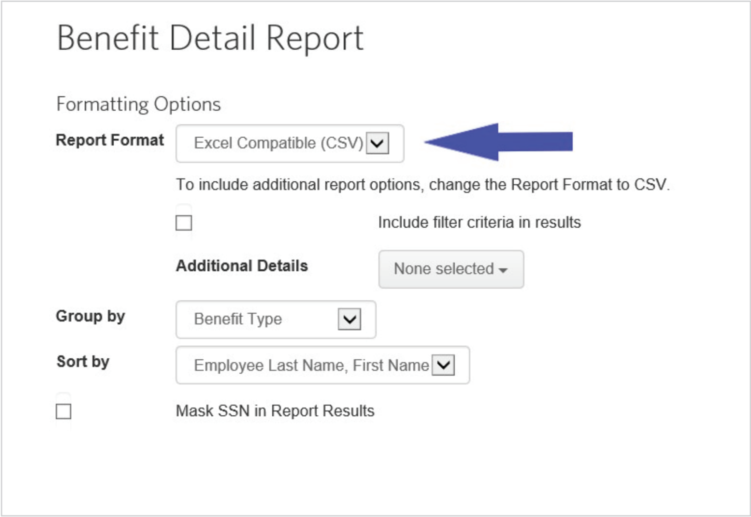
Benefit detail report

The benefit detail report is a standard report that contains benefit information for your employees. Follow the steps below to run a standard report, such as the Benefit Detail Report:

1. From the **Data & Reporting** screen, locate the report from the **Standard reports** tab

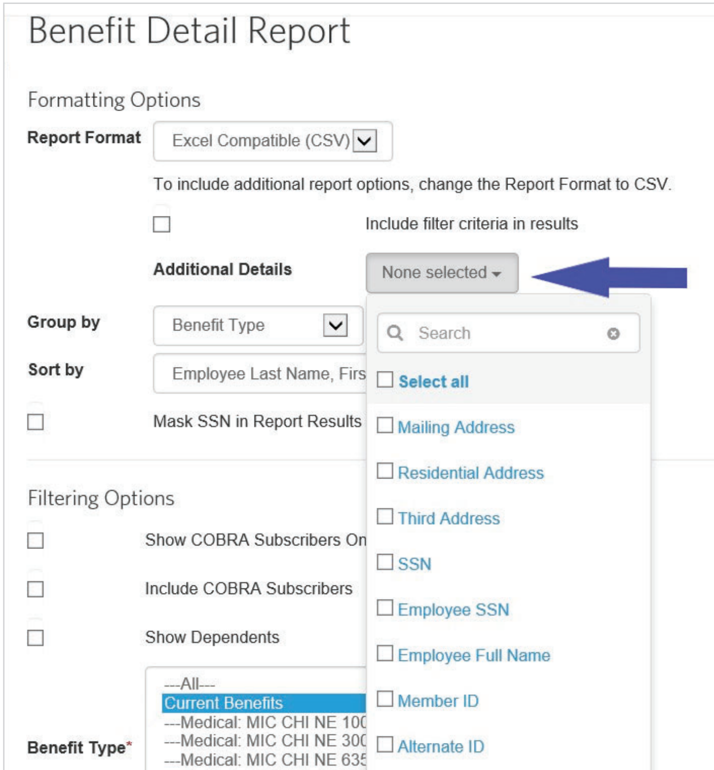


2. Select the format for your report from the **Report Format** drop-down menu (Typically, your options are CSV and PDF. It is recommend that you run your report in the Excel Compatible (CSV) format (the default option) so that you filter the data to include additional criteria, and the data can be sorted and analyzed as needed. This option allows you to include additional details, such as dependents' or employees' benefit details, or social security numbers, which are not included on the report by default.)

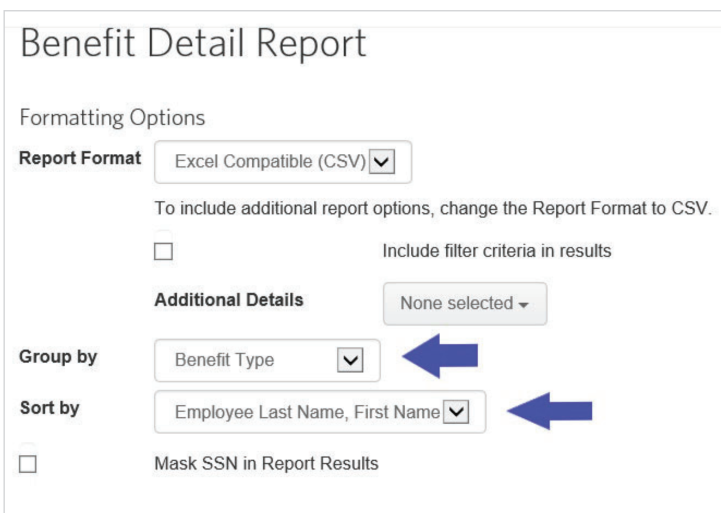


3. Select items from the **Additional Details** drop-down menu if you would like to include other information on the report

   For example, you may want to include employees' social security number (masked to show only the last four digits) or categories

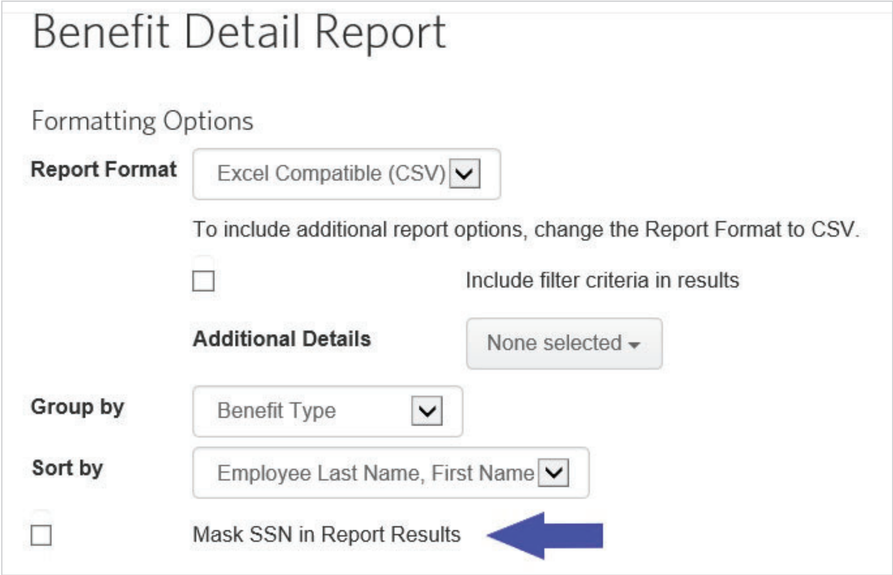


4. Specify options to group together and sort the information on your report

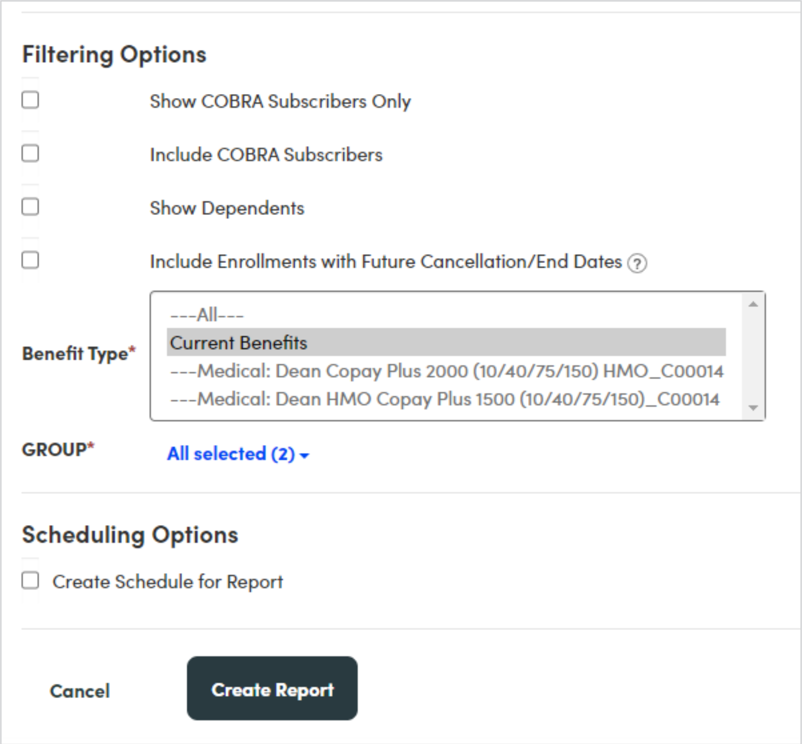


5. Select the **Mask SSN in Report Results** checkbox to only see the last four digits of employees' social security number on the report

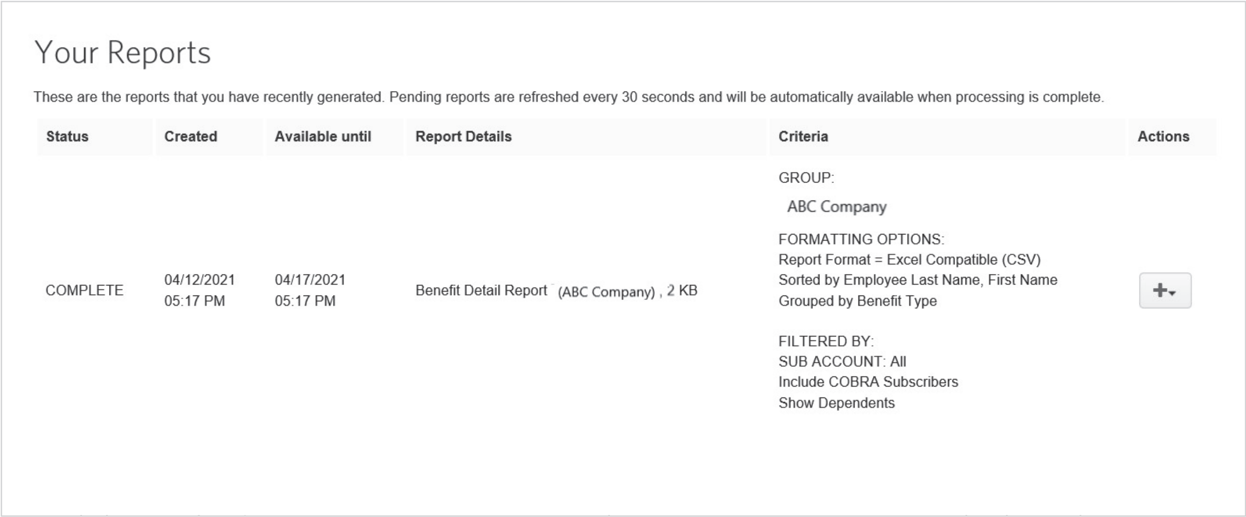
   Marking this option protects the employee's PHI, so that you can safely share the report



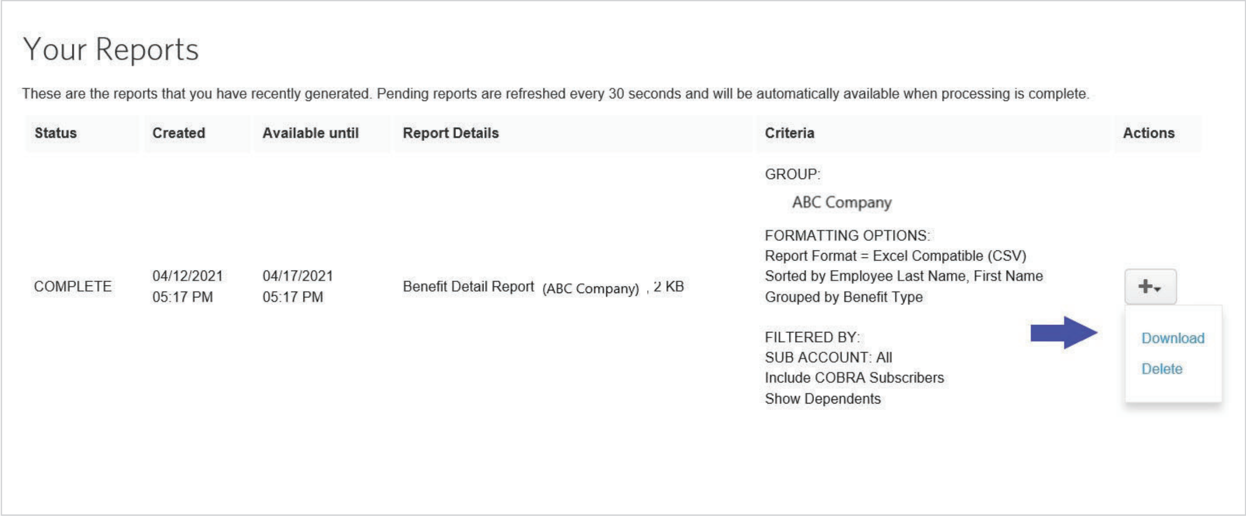
6. Specify filtering options, such as only including certain plans or categories of employees



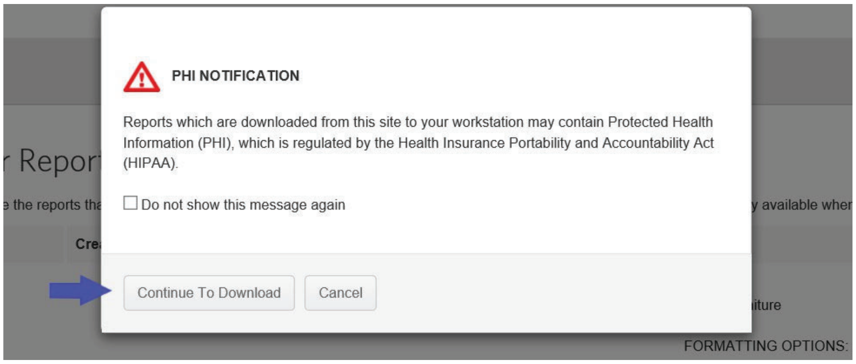
7. Click **Create Report** to be brought to the **Your Reports** tab which will hold any reports you have run in the last five days as either PENDING or RUNNING



8. Once the status of the report is COMPLETE, click **Download**, or you can share or delete complete reports



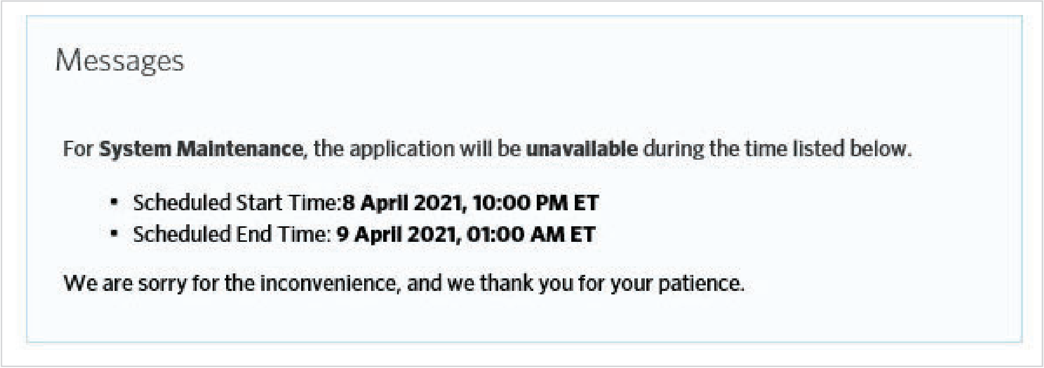
9. Click **Continue to Download** if the application warns you of the potential inclusion of protected health information (PHI) included on the report



10. The report is downloaded in your browser where you can click the file to open the report

Messages

The Messages area on the Home Page displays important information and instructions. This may include system messages alerting you to any planned application downtime for maintenance or messages from Medica.



Quick tips

What are my sign in requirements?

To sign in to the system, enter your **Username** and **Password** and click **Sign in**. Your **Password** must:

- Contain 8-15 characters
- Contain at least one uppercase letter
- Contain at least one lowercase letter
- Contain at least one number
- Not have more than two of the same characters in a row
- Not be the same as a previous password
- Not contain your Username

Session timeouts

A system message warns you that you will be logged out of the system if you remain inactive. The timeout period is 30 minutes. If you do not respond to the message, you are returned to the sign in page and must re-enter your **Username** and **Password**.

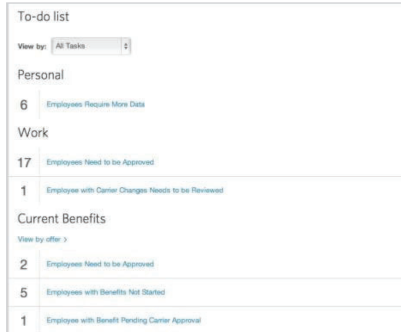
Lockout process

When you fail to sign in after a number of attempts, your Username is disabled. A Systems Administrator must unlock it.

How do I manage my daily tasks?

The **To-Do List** on your home page shows actions that you need to perform based on specific categories of information, such as an employee's benefits and tasks on the **Work** or **Personal** tabs.

Keeping up with the items in your **To-Do List** is vital in order to ensure that data is sent quickly and your employees' benefits are processed in a timely fashion.



Note: If your company has over 1000 employees,the **To-Do List** is collapsed by default, and you must select an option from the **View** by drop- down menu to view required tasks.

How do I add new employees?

Add new employees to the system by selecting the **Employees** tab and clicking the **Add New Employee** button.

Note that required fields are identified with an asterisk (*). The following fields are required to add a new employee to the system:

- First and Last Name
- Gender
- Date of Birth
- SSN
- Hire Date
- Address

Other fields may be required, depending on the settings established for your company.

Quick tips

How do I change plans for an existing employee?

1. Search for the employee
2. Select the **Benefit Details** link for the employee
3. Edit the benefit election

Note: You may be required to enter a life event, such as birth, marriage, etc. as a reason for changing the employee's benefit plan.

4. Click the **Edit** button next
5. to the **Plan** section to change the benefit plan
6. Select the new benefit plan and click **Next**
7. Continue with the enrollment flow and click **Save** when you have completed the plan change

How do I order ID Cards and welcome kits?

ID Cards and welcome kits are automatically issued when employees are added or changes are made.

To order an ID card, please have your employee sign in to Medica.com/SignIn, or call customer service.

How do I cancel a benefit policy without changing the employee's active status?

When you cancel benefits for employees,they remain as **Active** employees.

1. Search for the employee
2. Select the **Benefit Details** link for the employee
3. Edit the benefit election
4. Click the **Cancel Benefits for All** button

5. Click **OK** on the warning message that displays to confirm you want to cancel benefits

Note: You may be required to enter a life event, such as birth, marriage, etc. as a reason for changing the employee's benefit plan.

6. Enter the date to cancel benefits and click **Next**
7. Review and **Save** the changes

How do I change an effective date after the employee is enrolled?

Please contact Medica to make this change.

What reports can I access?

You can create numerous group reports, including **Benefit Detail, Employee Census** and **Dependent Census** reports.

From the **Data & Reporting** tab, you can:

- Generate reports in multiple file formats, including PDF, Excel or CSV
- Sort report data by employee name or SSN
- Group and/or filter report data

You can also generate employee-specific reports from the **Employee Reports** section of the employee's record.

What's the difference between canceling benefits and terminating employment?

When you cancel benefits for employees,the employee remains in an **Active** status.

Terminating employment changes the status of the employee from **Active** to **Terminated** and also cancels all benefits for the employee.

1. Search for the employee
2. Select **Terminate Employment** from the **Manage Employee** drop- down menu
3. Enter the employment termination date for the employee
4. Enter a **Termination Reason** and click **Next**
5. Review the pre-populated benefit cancellation date for each benefit available
6. **Save** the changes

How do I rehire employees?

Once employment is terminated, employees can be rehired and their benefits can be reinstated.

To rehire an employee:

1. Search for the employee
2. Select **Rehire Employee** from the **Manage Employee** drop-down menu
3. Enter the employee's rehire date
4. Click **Next**
5. Select the appropriate **Benefit Reinstatement** radio button
6. If applicable, specify how to reinstate the employee's benefits
7. Review the rehire information and click **Save**

Questions? We're here to help.

Your best resource is the Employer Service Center.

Hours of operation

Monday, Tuesday, Wednesday, Friday
from 8 a.m. - 5 p.m.
Thursday from 9 a.m. - 5 p.m.

Phone: 1 (866) 894-8052

Fax: 1 (952) 992-3021

Email: medicaservicecenter@medica.com