

Account Management Portal

Instructional Overview

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UNITED CONCORDIA®
DENTAL

Protecting More Than Just Your Smile®

Account Management Portal (AMP) Instructional Overview

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REGISTRATION EMAIL

Below is an example of the registration email that the Policy Maker for the company will receive.

To begin the registration process, click the link in the middle of the email.

You have been identified as your company's Account Security Administrator (ASA) and therefore United Concordia has granted you initial access to the account management portal. This account will allow you to administer enrollment and billing functions as well as provide the capability to delegate these functions to other employees within your organization.

To gain access to the account management portal, you will need to complete the process below. **The link for this process will remain active for the next 90 days.**

1. Click on the account-activation link below
2. Enter your Email Address
3. Enter your Secret Key (*Your Secret Key is your six-position base group number*)
4. Verify your information
5. Complete the registration process

If you are not a current e-Bill customer, but wish to use e-Bill, you will need the most recent Invoice Number(s) for each Recipient Number you manage.

<https://secure.ucci.com/tadgpt/employer/gsaRegValidateAccount.xhtml?activationKey=MjYyNjE%3D>

If you cannot click on the above link, or clicking on the link results in an error, please copy and paste the link into your web browser.

If you have questions or seek further clarification about your role as ASA, please review the [Frequently Asked Questions](#) in the **Employers** section on UnitedConcordia.com or call Membership and Billing at 1-888-320-3316, option 3, Monday through Friday, 8 a.m. - 5 p.m. ET.

Thank you.

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REGISTRATION PROCESS

Enter your email address and Secret Key. The secret key is the first 6 digits of the base group number assigned to your account.

Account Management Portal Account Creation



Validate Account

Welcome to the account management portal registration and sign in process.
By successfully completing the registration, you will be granted access to account management portal, which allows you single sign-on access to both enrollment and billing applications.

*Email Address:

*Secret Key: [? About the Secret Key](#)

The Secret Key is your six position base group number or the six position unique identifier provided to you by your Account Security Administrator. The combination of the Secret Key and Email Address are validated with our system to ensure that you are the proper user.

Review the information presented and select “Continue”

Account Management Portal Account Creation



Review Your Information

Your Personal Information

*First Name: x

*Last Name:

Company:

Email Address:

*Phone Number: () - Extension:

Your Assigned Applications

Application	Access Level	Description
Enrollment	Maintenance	You will be able to add and manage Member Enrollment information, issue ID cards and run enrollment roster reports.

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Accept the Application Terms & Conditions

Account Management Portal Account Creation

Validate Account → Review Info → **Terms/Conditions** → Credentials → Verify and Complete Account

Terms & Conditions

Please review and agree to the Terms & Conditions listed below.

Application Terms & Conditions

Employer Group ("Group") desires to use one or more United Concordia digital electronic communications services ("Services") in order to transact business with United Concordia on behalf a Group Dental Plan. Acceptance of these terms and conditions ("Terms and Conditions") via an electronic signature is a precondition to obtaining access to the Services.

1. Definitions.

Group. An employer group customer of United Concordia.

Other Contract. A benefits contract, agency agreement, or agreement adopted by the parties, other than these Terms and Conditions.

Account Security Administrator ("ASA"). A person possessing the requisite legal authority as a Group officer or employee to execute documents on behalf of Group and to designate Users to access the Services.

United Concordia. United Concordia Companies, Inc., a wholly owned subsidiary of Highmark Inc., or any United Concordia Companies, Inc. corporate affiliate or subsidiary.

User. A person designated by ASA to access to Services as further described below.

If billing access was given the below options will be displayed for e-Bill, United Concordia's web application for invoice presentation, electronic payments, billing /payment history and the generation of invoice roster reports.

- I am a current e-Bill User
- I want to be an e-Bill User
- I do not want to use e-Bill

Account Management Portal Account Creation

Validate Account → Review Info → Terms/Conditions → **Credentials**

e-Bill Account

At this time you will need to select a Username and Password. For your convenience the Username and Password that you select will provide you single sign-on access to the account management portal applications. Please review the information below to help you select the appropriate account.

I am a current e-Bill User

I want to be an e-Bill User

I do not want to use e-Bill

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Create your own personalized ID and Password

Select your Username and Password

*Username: Username must be 6 - 20 characters and can contain letters, numbers, underscore(_), dashes (-), at sign (@), and period.

*Password: Password:
- must be 8 - 20 characters
- must contain at least 1 numeric digit
- must contain at least 3 unique characters

*Retype Password:

Select your Security Question

*Security Question: ▼

*Answer:

If the **“I want to be an e-Bill User”** option is chosen a screen is displayed for validating invoices.

*Note – One of the last two invoice numbers generated for the account is required for this step

You are eligible for access to the Recipient Number(s) below.

- Recipient Number(s) with text entry boxes require Invoice Number validation. Please provide the most recent Invoice Number(s) for any Recipient Number(s) requiring validation.
- Recipient Number(s) with “Access Confirmed” have already been validated either using an existing e-Bill User ID or by another account management portal user within your organization.
- Recipient Number(s) with “No Invoice Available Yet” cannot be validated at this time. Please check back once you have received your Invoice Number(s).
- Invoice Number validation does not have to be completed in order to register for the account management portal, simply leave the entry box or boxes blank and click continue. You will be able to provide the Invoice(s) through the account management portal dashboard at your earliest convenience.

Recipient Name	Recipient Number	Invoice Number
GROUP INC	0000	<input type="text"/>
GROUP INC	0000	<input type="text"/>

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ADDING A SUBORDINATE USER

Once the registration and e-Bill validation is completed the “**My Tools**” page will be displayed on the Account Security Administrator’s (ASA) dashboard with the following icons.



Select the “**User Management**” tab to manage access and permissions to membership data.



Select “**Add New User**” to enter the subordinate user’s information

Add New User

Select user to update

Name	Status	Certification [?]	Delete
 Billing - DNC, Membership	Active	Certified	

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Subordinate User Information

User Information Assign Permissions Review User Information

Provide User Information

Personal Information

*First Name:

*Last Name:

*Email Address:

*Phone Number: () - Extension:

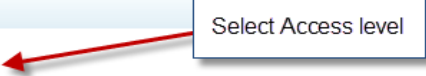
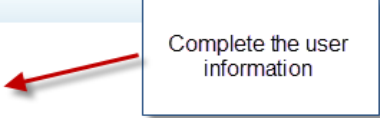
*Secret Key: [? About the Secret Key](#)

User is a Third-Party delegate? [? About the Delegation Indicator](#)

Access Level

All Groups and Applications
Selecting this option allows the user to access all groups and applications at the highest level of authority within the user's company/organiz

Customize this User's Groups and Access Permissions
Selecting this option allows you to choose the user's groups, applications and access levels. This option is best if you want to have certain p specific groups or functions.



User Information Assign Permissions Review User Information

User Information



First Name: United
Last Name: Concordia
Account Name:
Email Address: account.mgmt@ucci.com
Phone Number: 555-555-5555
Secret Key: 123456

Assigned Applications

Application	Access Level	Description
Enrollment	Maintenance	You will be able to add and manage Member Enrollment information, issue ID cards and run enrollment roster reports.
Billing	View/Pay Bills	You will be able to view and pay Dental Administrative Fee invoices.

Verify Access Level (s)

Sends registration to user



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DASHBOARD

Navigation will be through the customer's dashboard.



My Tools



Billing



Enrollment

Select the “**My Profile**” tab to update personal information and reset passwords.

Select the “**Enrollment**” icon to view, update and run enrollment rosters.

Select the “**Billing**” icon to access the online billing system, e-Bill.

Note: If the group's enrollment method is electronic, update capabilities will be disabled. Inquiry/View only access is available

If the billing validation hasn't been completed the “**Finish Activations**” icon will appear on the users dashboard. Validation can be completed at a later time by selecting this icon.



My Tools



Enrollment



Finish
Activations

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ENROLLMENT SEARCH


When selecting the “**Enrollment**” icon from the dashboard the options to Search, Add New Contract or Run Reports will be displayed.

To begin a search for an existing contract input the member Identification Number or Name.

[Employers](#) | [Account Management Portal](#) | [Dental Health Center](#) | [FAQs](#)

Enrollment Search

Search by Identification Number or Name

Identification Number: 

Last Name:

At least one character of First Name is required

First Name:

The Contract Detail screen is displayed. View current enrollment and enrollment history for all family members or select the desired function from the “Action” drop down box.

Current Enrollment

Contract Detail for Identification Number: The number assigned to identify a contract will display (if by SSN it will be redacted)

Go To:

Subscriber Enrollment

[Issue ID Card](#) Issued: 12/07/2013 ID card option will not display if ID cards are not issued by UCD

Address: Email: Date of Birth:
Home Phone Number: Gender: Female
Work Phone Number:

Enrollment Detail	Status	Group Number	Enrollment Effective Date	Enrollment Cancel Date	Enrollment Cancel Reason	Type Contract	Payroll Location
View	Active	<input type="text"/>	01/01/2014			Family	

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Enrollment History

The screenshot displays the United Concordia Account Management Portal. At the top, the logo reads "UNITED CONCORDIA® Insuring America's Dental Health" with a "Sign Out" link. Navigation tabs include "Employers", "Account Management Portal", "Dental Health Center", and "FAQs". A search bar and buttons for "Add New Contract", "Reports", and "View/Update" are present. The main heading is "Enrollment History for Identification Number:" followed by a redacted field and a "Return to Contract" link. Below this is a "Subscriber Enrollment History" section with a redacted area. A table lists enrollment details:

Enrollment Detail	Status	Group Number	Enrollment Effective Date	Enrollment Cancel Date	Enrollment Cancel Reason	Type Contract	Payroll Location
View	Active		06/01/2013			Family	Edit
View	Active		05/01/2013	06/01/2013	Change In Coverage	Individual Male	

Subscriber Actions

Options available at the "Action" dropdown box for users with update access.

- **Add Coverage for Subscriber:** This will enable the user to reinstate coverage, close a gap in coverage, etc.
- **Cancel Enrollment:** This will cancel the ENTIRE contract, including subscribe and all dependents.
- **Edit Subscriber Information or Edit Subscriber Address:** Both options will direct you to the same screen to perform updates to subscriber demographic information.
- **Change Group Number:** This will allow the user to cancel enrollment from one group number and add enrollment into another group number within one transaction.
- **View Subscriber Enrollment History:** View past or cancelled enrollment segments.

Action:

- Choose
- Add Coverage for Subscriber
- Cancel Enrollment
- Edit Subscriber Information
- Edit Subscriber Address
- Change Group Number
- View Subscriber Enrollment History

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ADDING A NEW CONTRACT & DEPENDENTS

Select the “Add New Contract” tab

Employers	Account Management Portal	Dental Health Center	FAQs
<input type="text" value="Search"/>	<input type="text" value="Add New Contract"/>	<input type="text" value="Reports"/>	

Enrollment Search

Search by Identification Number or Name

Identification Number: 







Last Name:

At least one character of First Name is required

First Name:

Complete the subscriber information (Items marked with an * are required fields)

Add New Contract

Progress	Subscriber Information
Subscriber Information	<i>*Required Field</i>
Subscriber Address	*Identification Number: 
Dependent Enrollment	<input type="text"/>
Other Dental Coverage	Prefix:
Summary	<input type="text"/>
Confirmation	*First Name:
	<input type="text"/>
	Middle Name:
	<input type="text"/>
	*Last Name:
	<input type="text"/>
	Suffix:
	<input type="text"/>
	*Date of Birth:
	<input type="text"/> 
	*Gender:
	<input type="text" value="Choose"/> 
	*Group Number:
	<input type="text" value="Choose"/> 
	*Enrollment Effective Date: 
	<input type="text"/> 

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Complete the "Subscriber Address" information and continue.

Add New Contract

Progress Subscriber Information ✓ Subscriber Address Dependent Enrollment Other Dental Coverage Summary Confirmation	Subscriber Address <i>*Required Field</i> Use Foreign Address *Street Line 1: <input type="text"/> Street Line 2: <input type="text"/> *City: <input type="text"/> *State: Choose <input type="button" value="v"/> *Zip Code: <input type="text"/> <input type="text"/> <hr/> Home Phone Number: <i>Example: 7173214567</i> <input type="text"/> Work Phone Number: <i>Example: 7173214567</i> <input type="text"/> Email Address: <input type="button" value="?"/> <input type="text"/>
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Select "Add New Dependents" for dependent enrollment or select "Continue" to skip this step.



Employers	Account Management Portal	Dental Health Center	FAQs
<input type="button" value="Search"/>	<input type="button" value="Add New Contract"/>	<input type="button" value="Reports"/>	
Add New Contract	<input type="button" value="Add New Dependent(s)"/>	<input type="button" value="Continue"/>	Group Information <input type="text"/> Effective Period: 02/01/2003- Vision Rider: No Product: Concordia Flex Dependent Eligibility 04/01/2012 - Max Dependent Age: 26 Removal Period: End of Month

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OTHER DENTAL INSURANCE/ SUMMARY PAGE

If other dental insurance is known, complete this section otherwise click the “Skip This Step” hyperlink.

Add New Contract

Progress	Other Dental Coverage (Coordination of Benefits)
Subscriber Information ✓	<i>*Required Field</i>
Subscriber Address ✓	 Skip This Step
Dependent Enrollment ✓	<i>If any member has other dental coverage, please complete the following, if known.</i>
Other Dental Coverage	Subscriber: Gomez Addams
Summary	Date of Birth: 02/01/1955
Confirmation	Policy Holder Name: <input type="text"/>
	Insurance Company: <input type="text"/>
	Policy/ID Number: <input type="text"/>
	Policy Effective Date: <input type="text"/> 
	<input type="button" value="Continue"/>

The “Summary” page is displayed with an option to edit any information listed or to cancel the transaction prior to saving the enrollment.

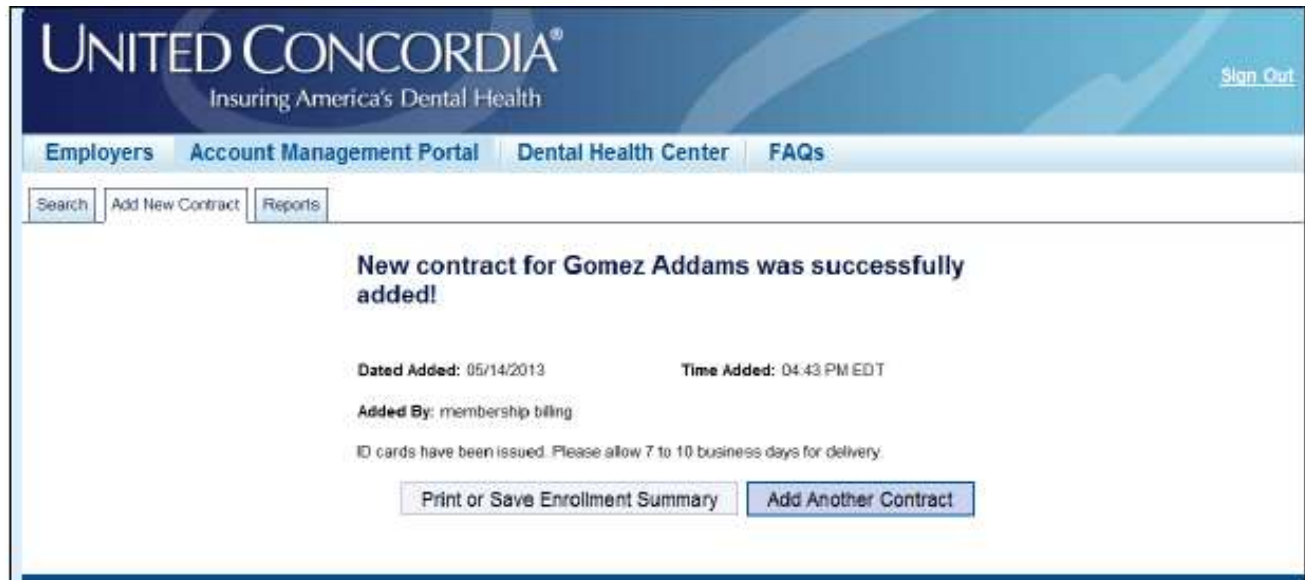
Add New Contract

Progress	Summary
Subscriber Information ✓	<input type="button" value="Save"/> <input type="button" value="Cancel"/>
Subscriber Address ✓	Subscriber Information ▼
Dependent Enrollment ✓	Identification Number: 979-79-7979
Other Dental Coverage ✓	Name: Gomez Addams
Summary	Date of Birth: 02/01/1955
Confirmation	Gender: Male
	Group Number: 259459-000
	Enrollment Effective Date: 11/01/2015
	<input type="button" value="Edit"/>
	Subscriber Address ▼
	Domestic Address: 123 Cemetery Hill Road Scaryburg PA 17110
	Home Phone Number: -
	Work Phone Number: -
	Email Address: -

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CONFIRMATION PAGE

Upon saving a “Confirmation” page will be displayed.

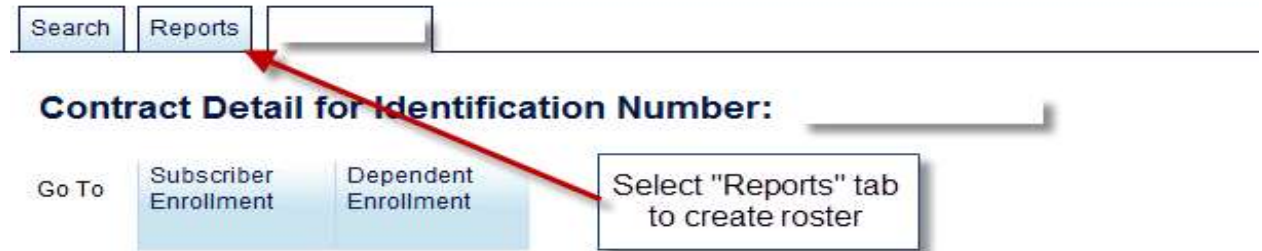


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REPORTS

Run rosters with real-time data

Users will be able to create and print roster reports containing their group members. To access the rosters click the "Reports" tab.



Reports

**Required Field*

*Group: All Groups

*Effective From:

*Effective To:

Subscribers and Dependents
Subscribers Only

The report is in Microsoft Excel format. Microsoft Excel Viewer can be downloaded for free [here](#) if Microsoft Excel is not available.

Enrollment Report

Group Number	ID Number	Last Name	First Name	Effective Date	Cancel Date	Relationship	Type Contract	Date of Birth
000000-000		Concordia	United	2013-02-01	2014-08-01	Subscriber	Family	1973-07-27
000000-000		Concordia	United	2014-09-01		Subscriber	Individual Female	1986-08-13
000000-000		Concordia	United	2010-08-01		Subscriber	Individual Female	1979-08-25
000000-000		Concordia	United	2010-08-01		Subscriber	Family	1966-03-14
000000-000		Concordia	United	2014-02-01		Subscriber	Family	1977-08-08
000000-000		Concordia	United	2013-11-01	2014-02-01	Subscriber	Individual Male	1963-09-10
000000-000		Concordia	United	2011-12-01	2014-09-01	Subscriber	Individual Female	1985-07-22