Account Management Portal

Instructional Overview

November 2015

UNITED CONCORDIA® DENTAL

Protecting More Than Just Your Smile®

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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

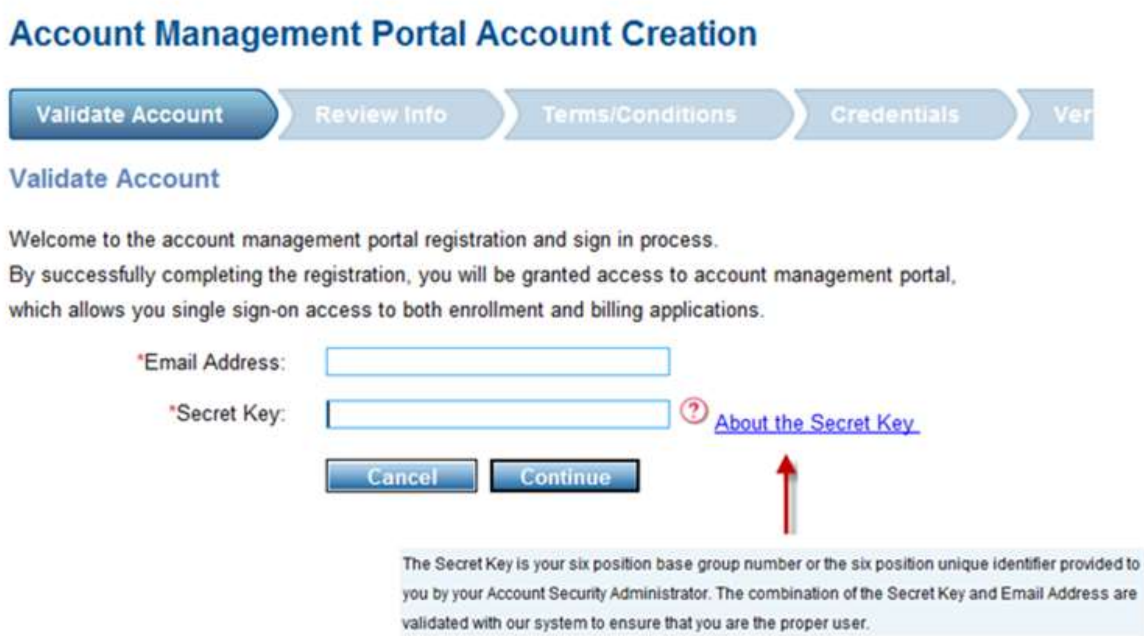
If you cannot click on the above link, or clicking on the link results in an error, please copy and paste the link into your web browser.

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.

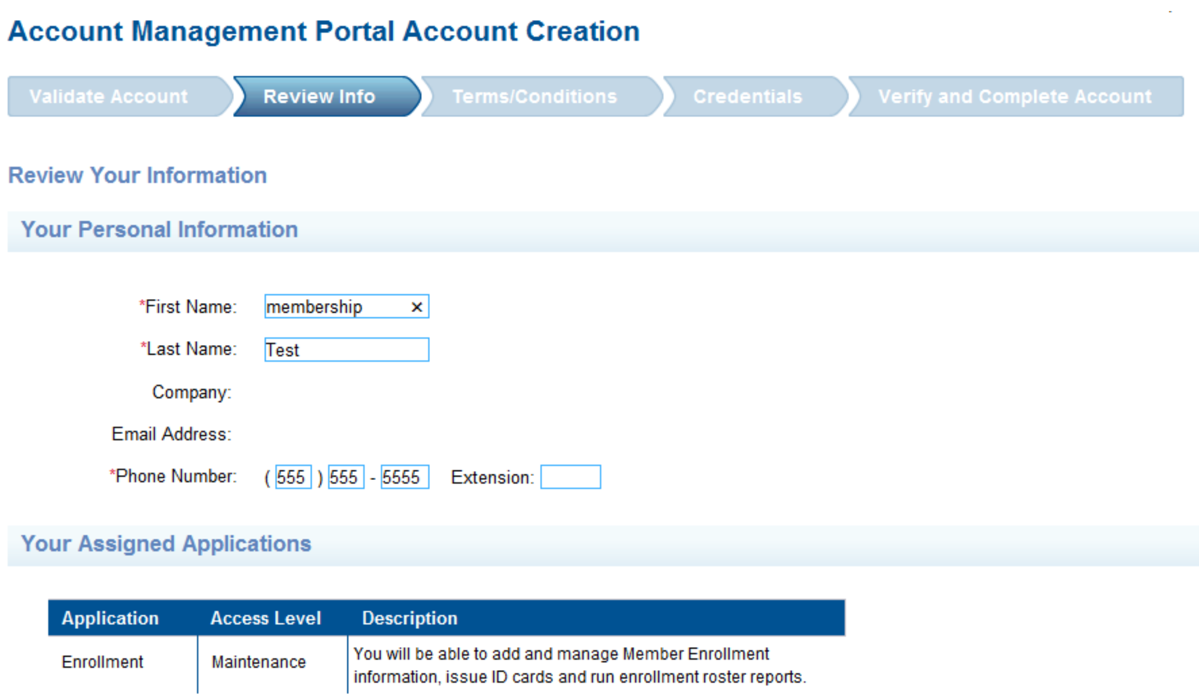
Thank you.

REGISTRATION PROCESS

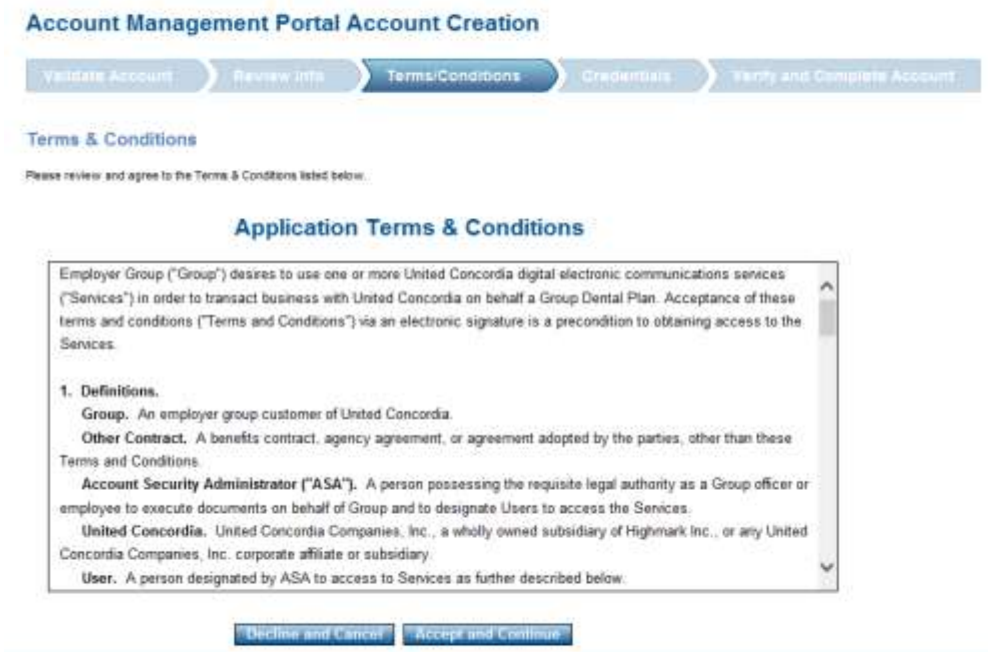
Enter your email address and Secret Key. The secret key is the first 6 digits of the base group number assigned to your account.



Review the information presented and select "Continue"

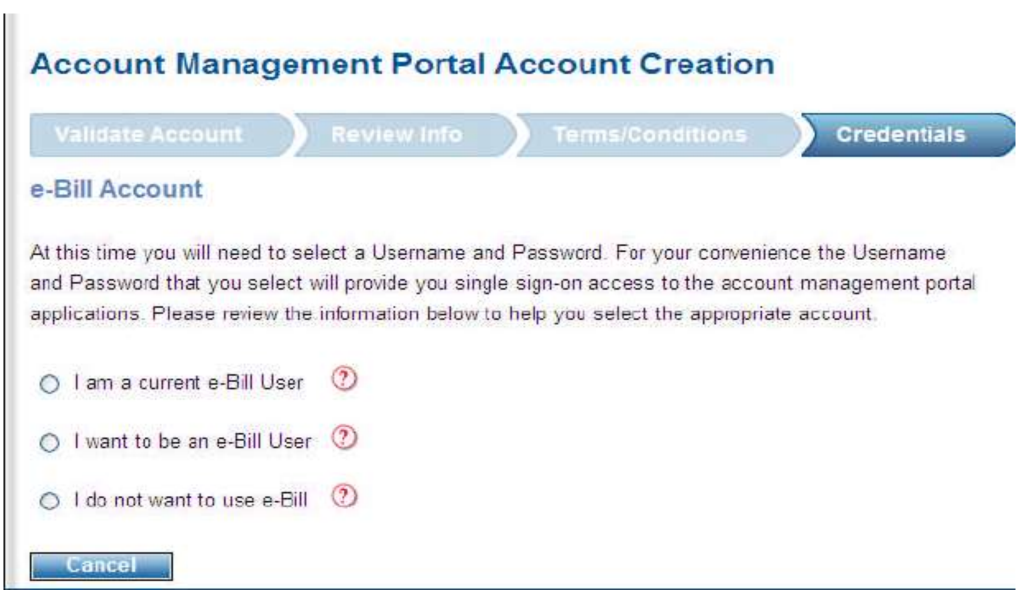


Accept the Application Terms & Conditions

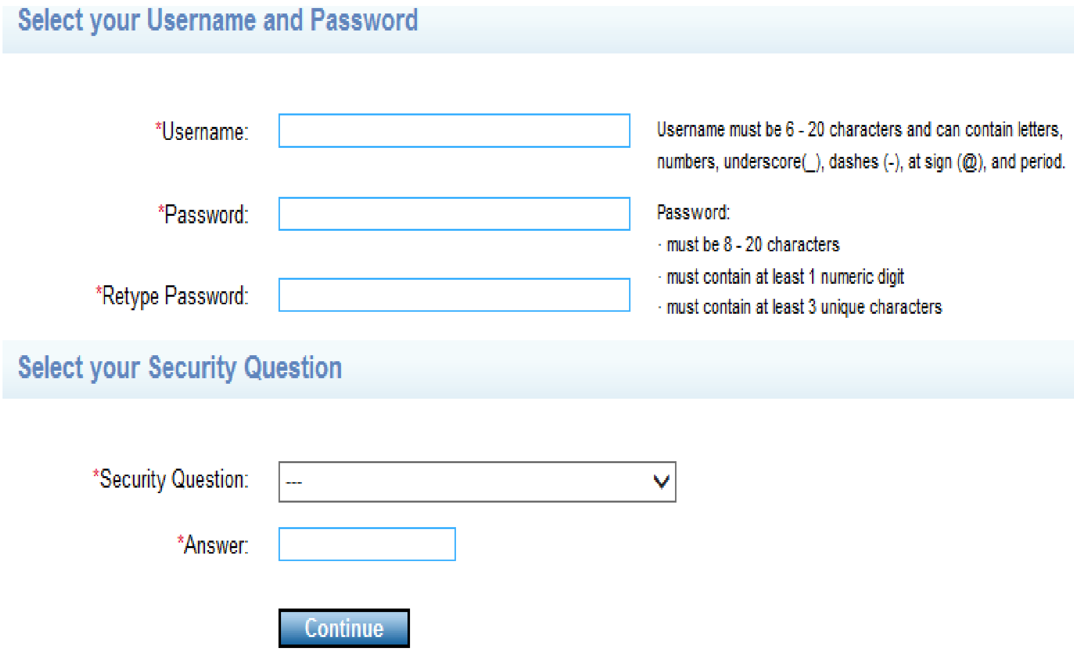


If billing access was given the below options will be displayed for e-Bill, United Concordia's web application for invoice presentation, electronic payments, billing /payment history and the generation of invoice roster reports.

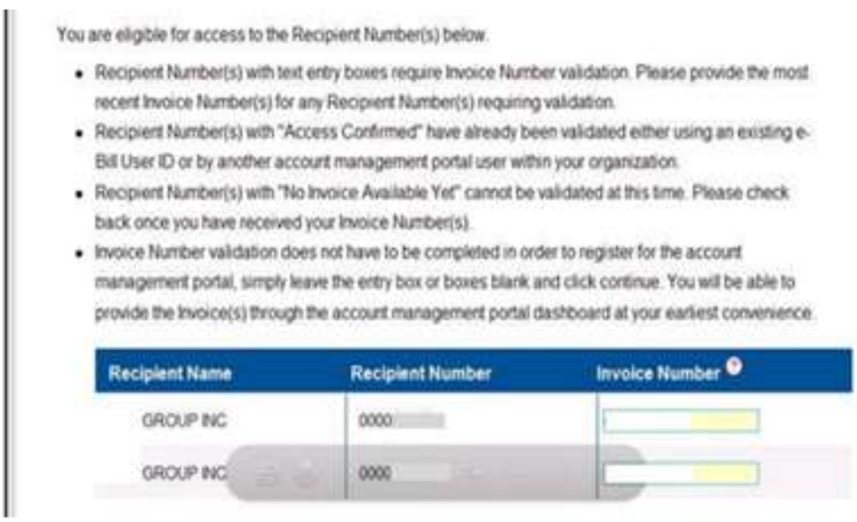
- I am a current e-Bill User
- I want to be an e-Bill User
- I do not want to use e-Bill



Create your own personalized ID and Password



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

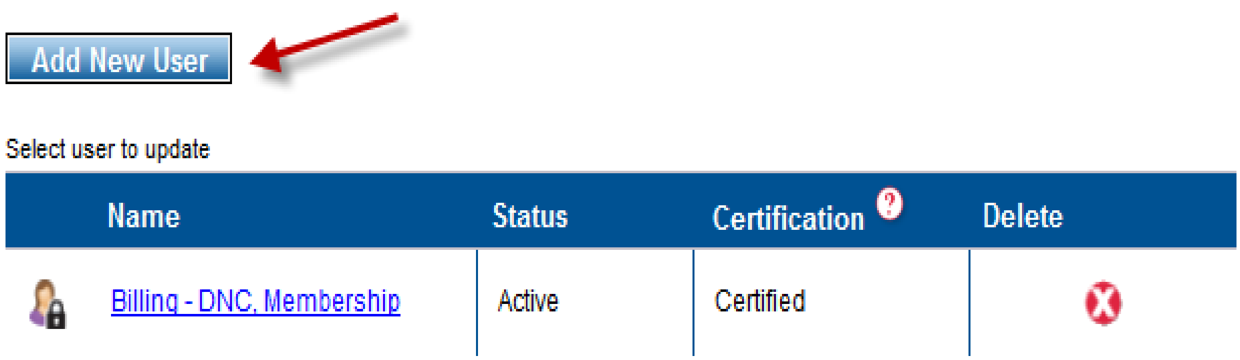


ADDING A SUBORDINATE USER

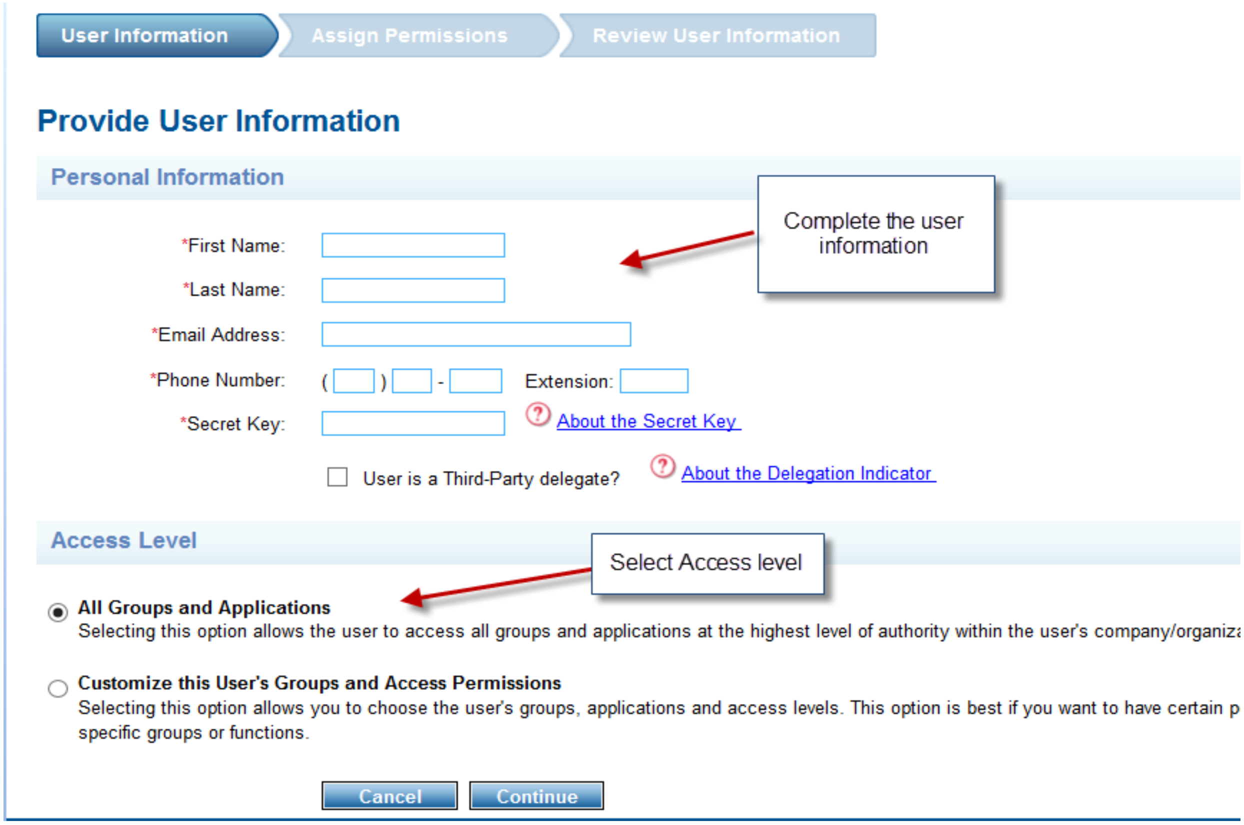
Once the registration and e-Bill validation is completed the **"My Tools"** page will be displayed on the Account Security Administrator's (ASA) dashboard with the following icons.

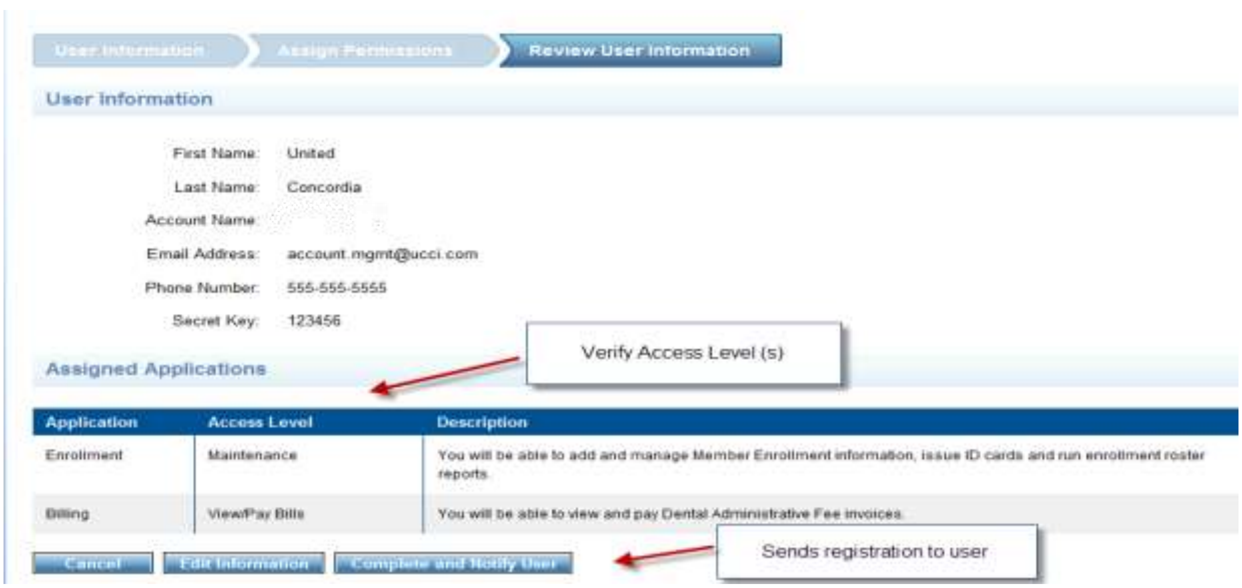
Select the "User Management" tab to manage access and permissions to membership data.

Select "Add New User" to enter the subordinate user's information



Subordinate User Information





DASHBOARD

Navigation will be through the customer's dashboard.

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.

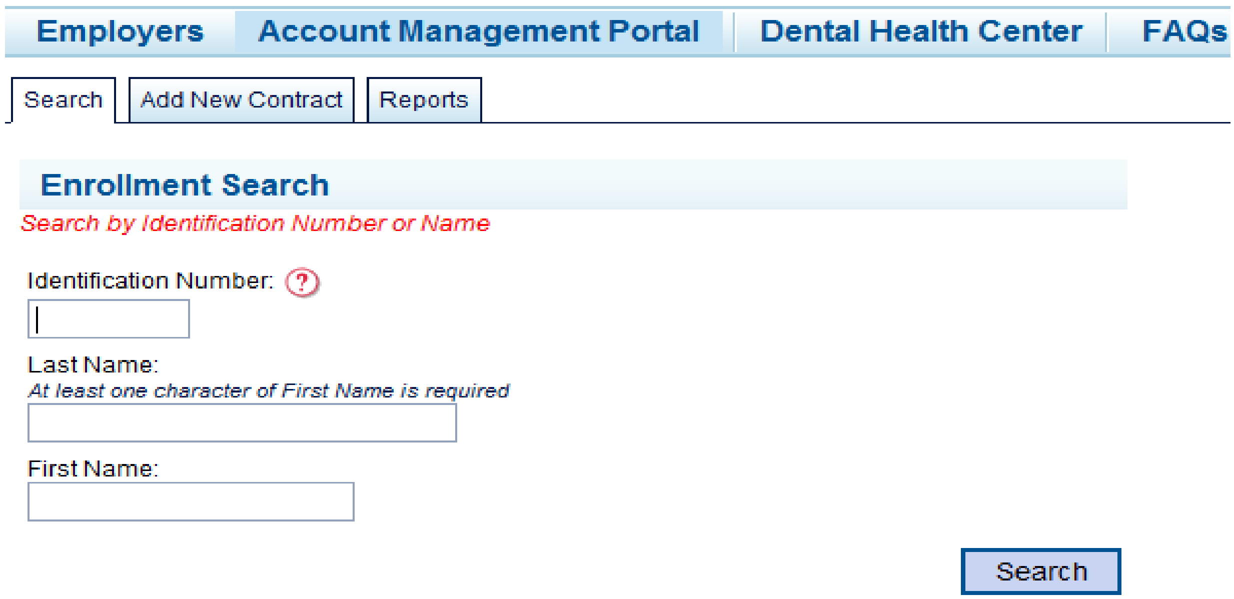
> Note: If the group's enrollment method is electronic, update capabilities will be disabled. Inquiry/View only access is available

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.

ENROLLLMENT SEARCH

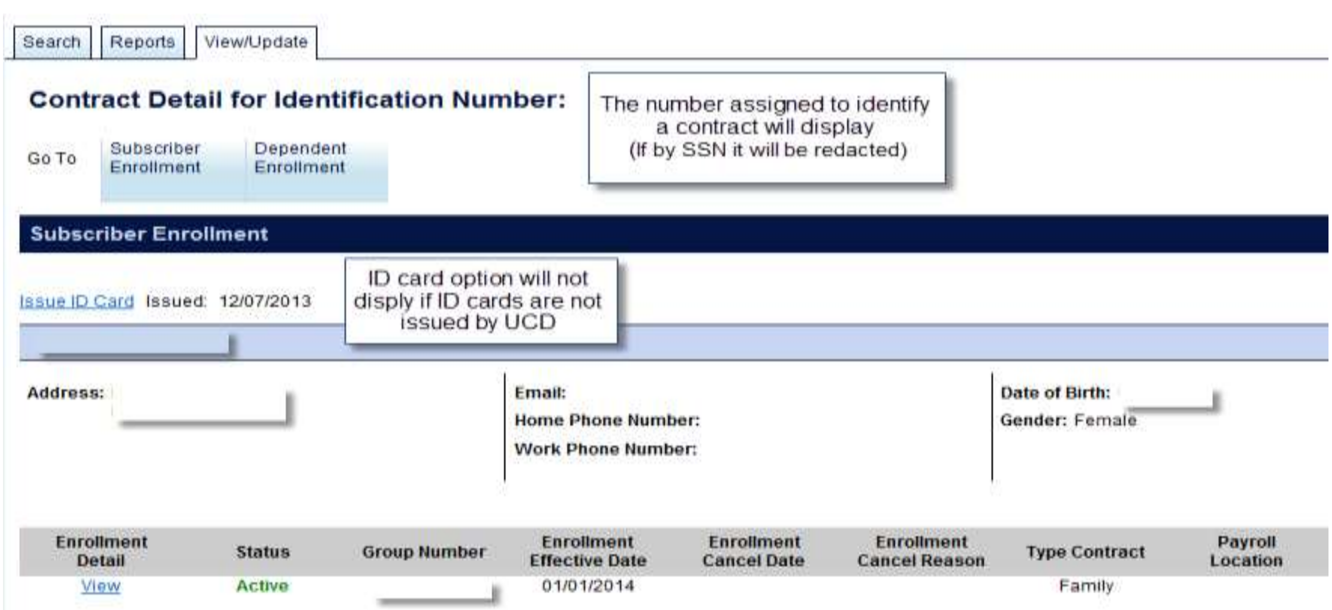
When selecting the “**Enrollment**” icon from the dashboard the options to Search, Add New Contract or Run Reports will be displayed.

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

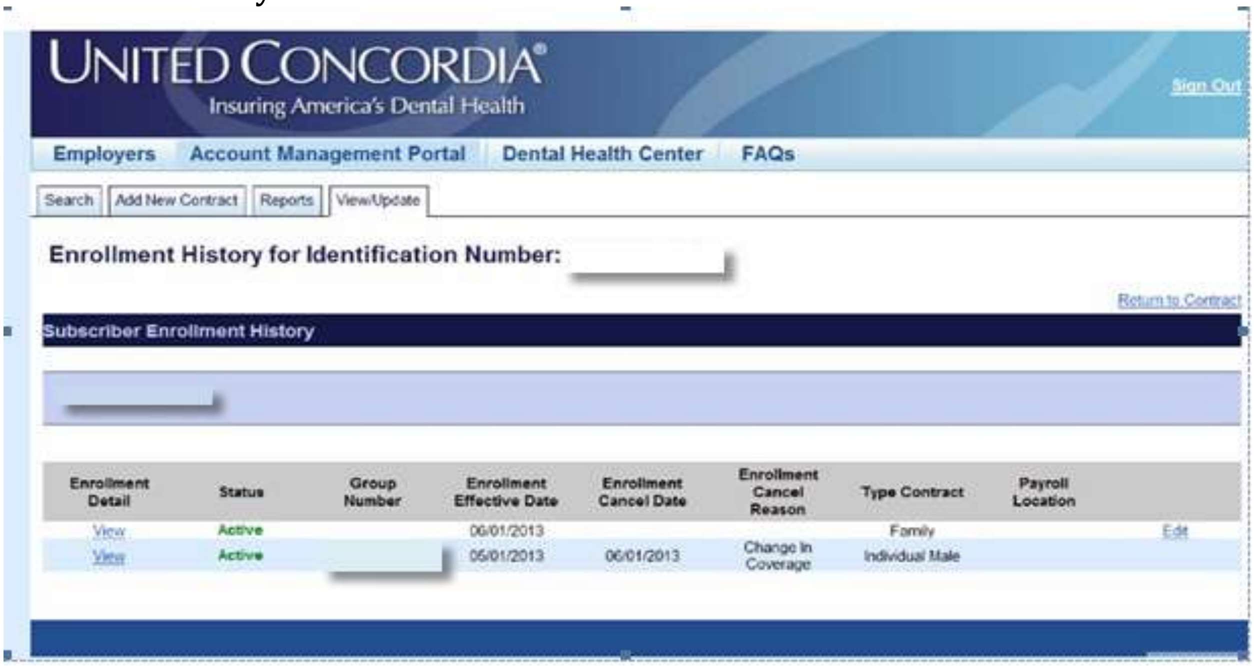


The Contract Detail screen is displayed. View current enrollment and enrollment history for all family members or select the desired function from the “Action” drop down box.

Current Enrollment



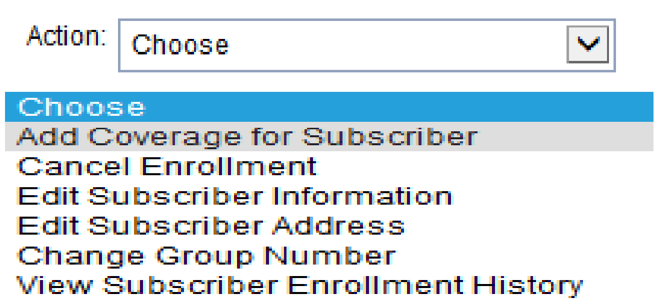
Enrollment History



Subscriber Actions

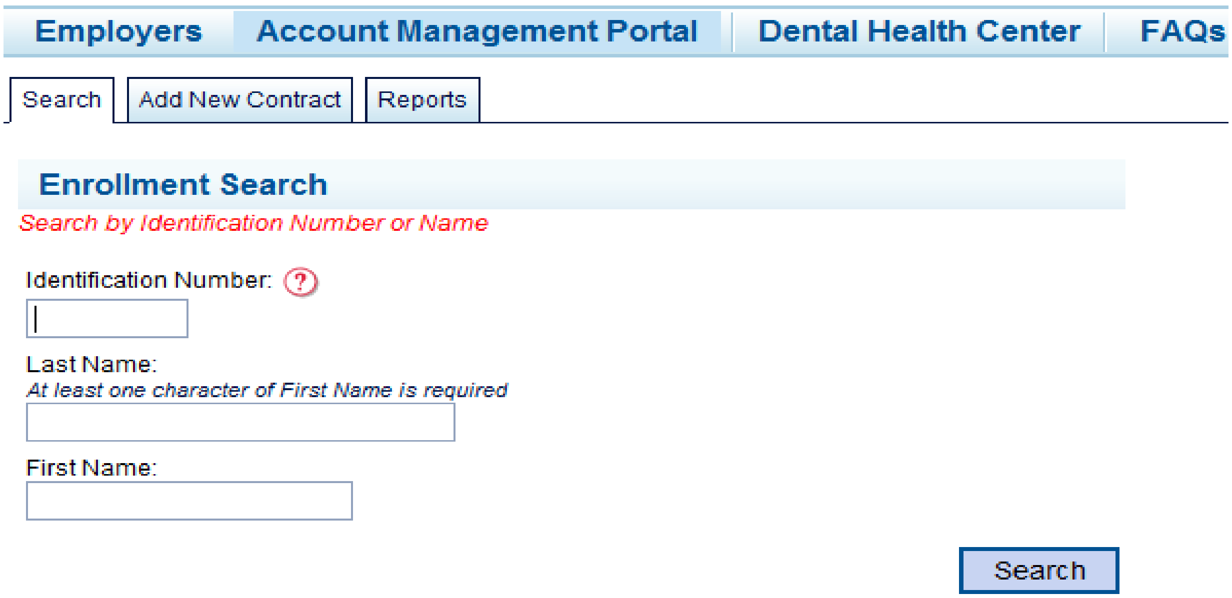
Options available at the **"Action"** dropdown box for users with update access.

- **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.

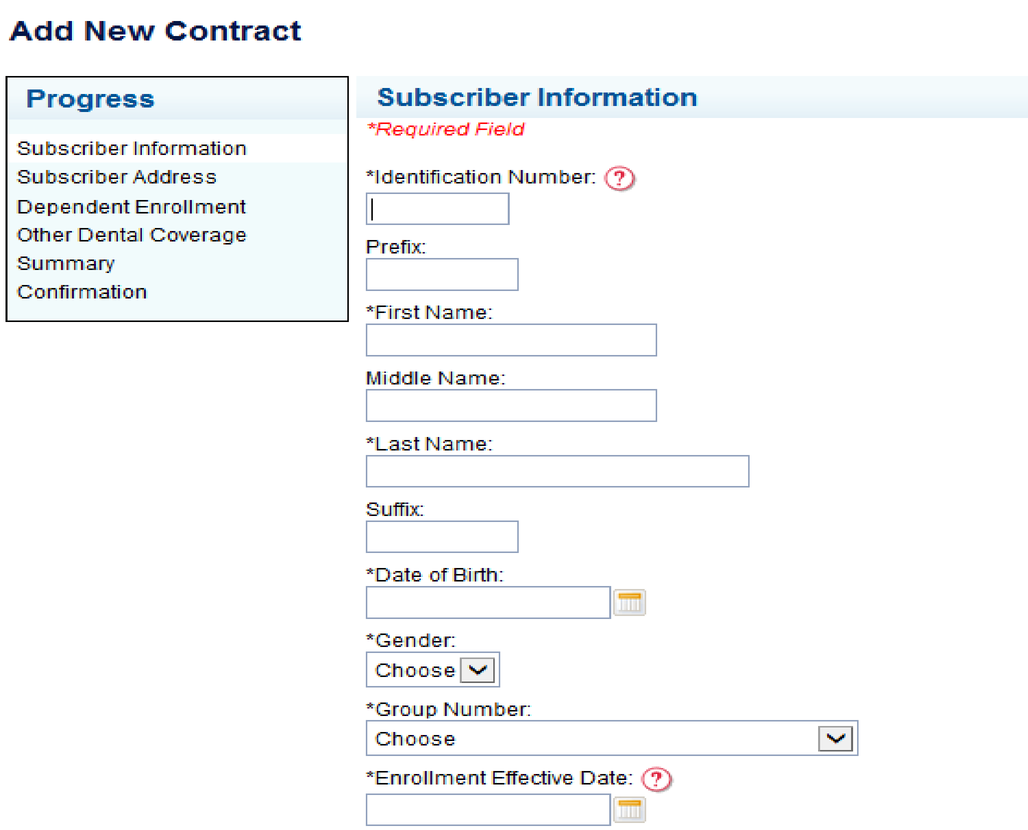


ADDING A NEW CONTRACT & DEPENDENTS

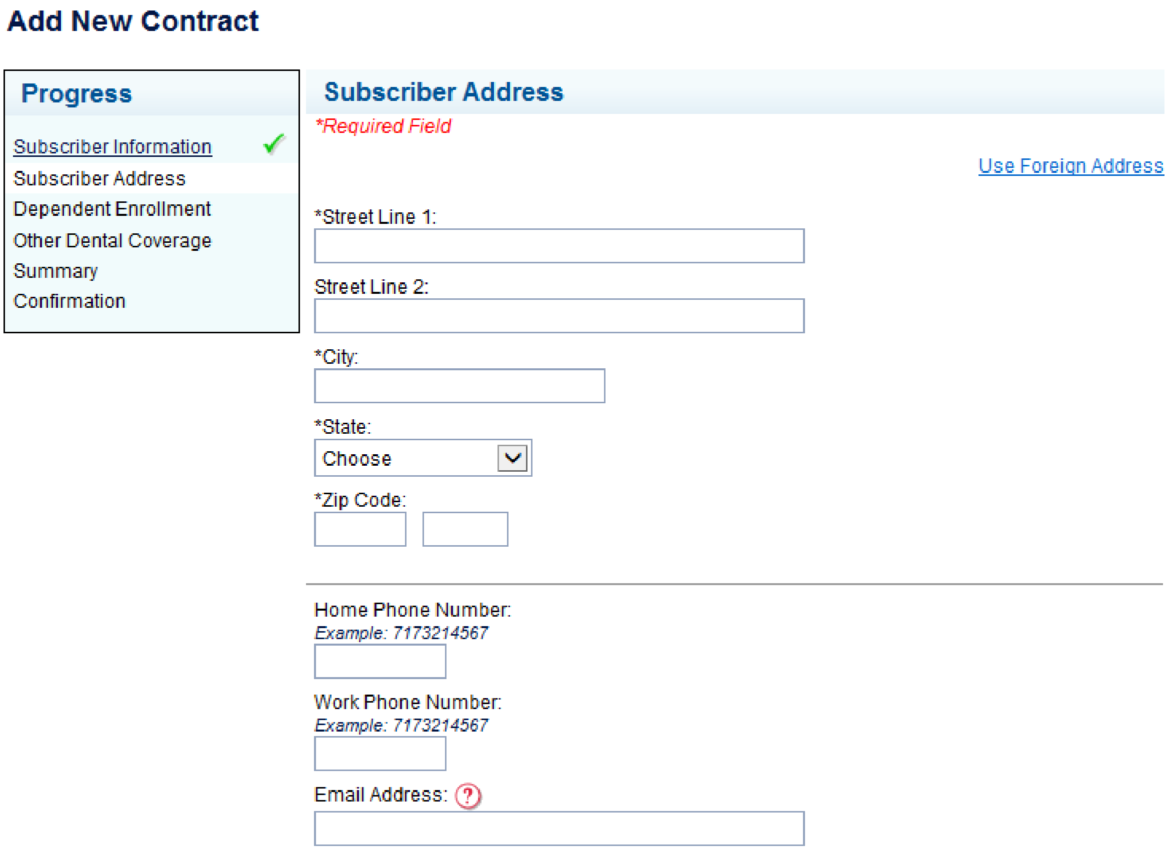
Select the "Add New Contract" tab



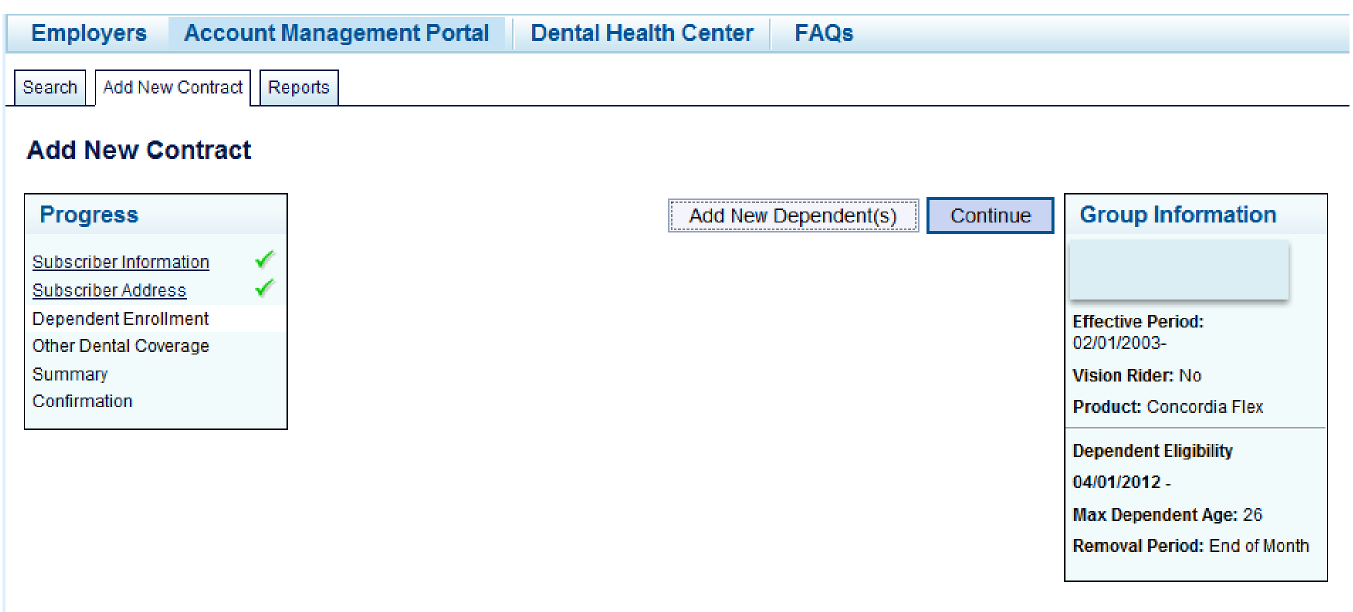
Complete the subscriber information (Items marked with an * are required fields)



Complete the "Subscriber Address" information and continue.

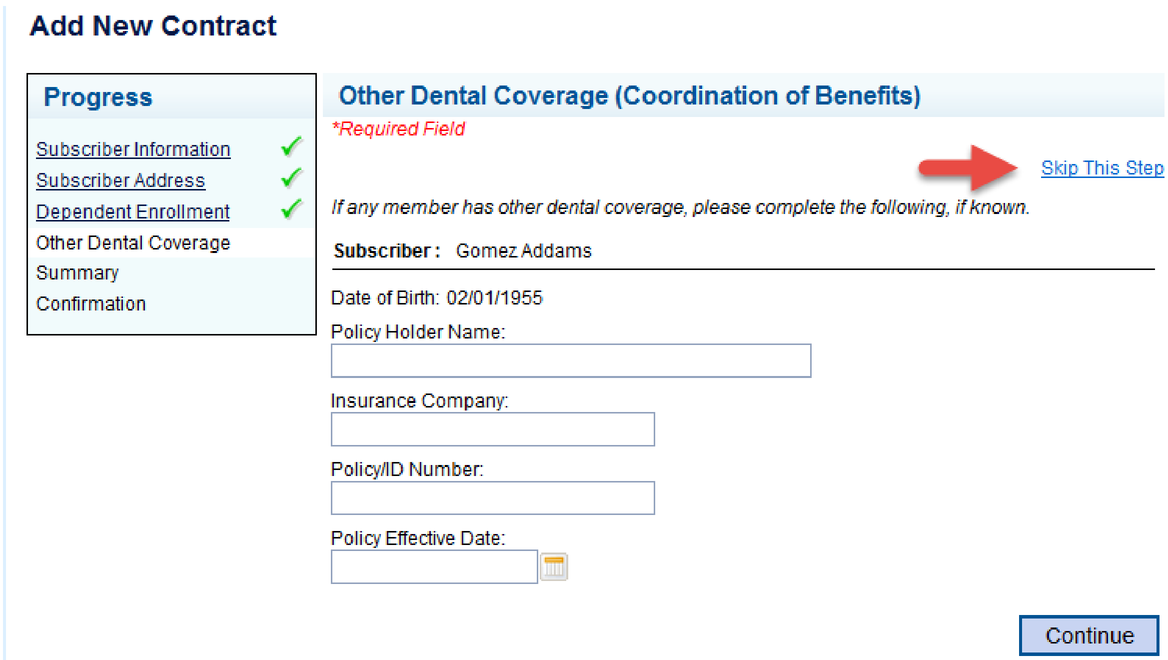


Select "Add New Dependents" for dependent enrollment or select "Continue" to skip this step.

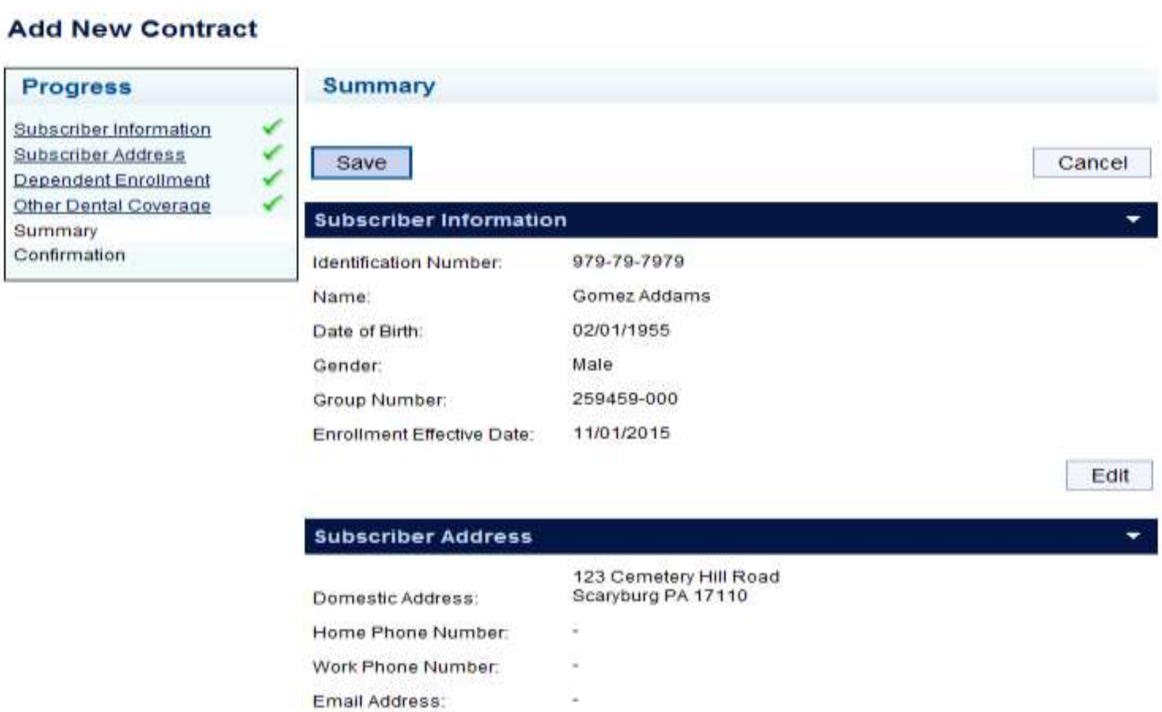


OTHER DENTAL INSURANCE/ SUMMARY PAGE

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

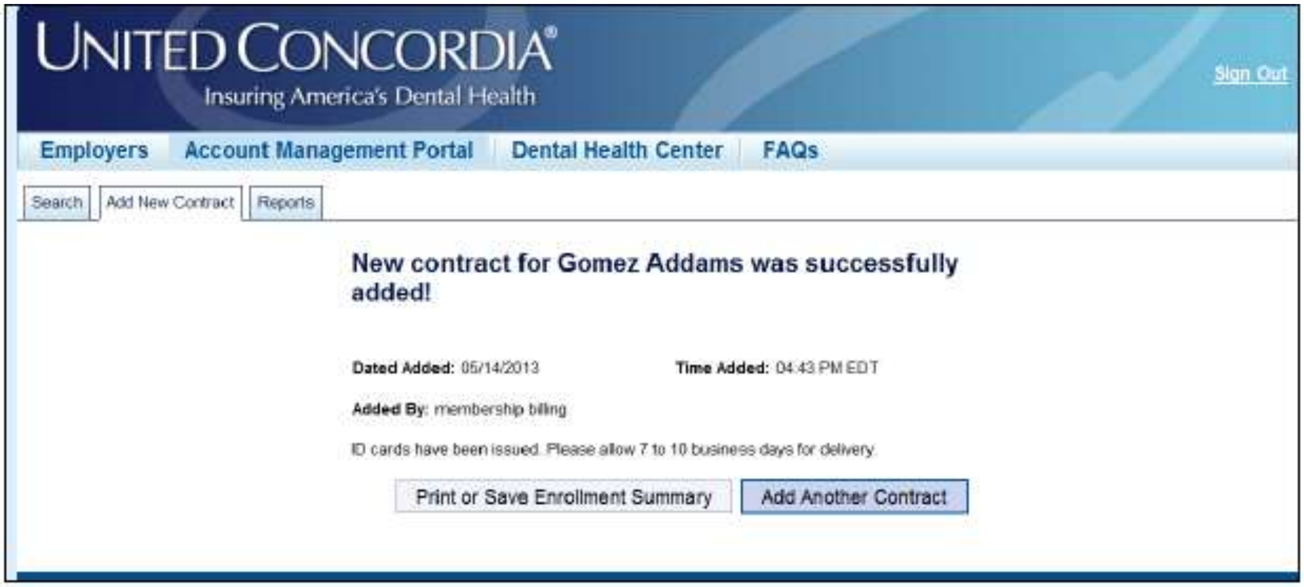


The "Summary" page is displayed with an option to edit any information listed or to cancel the transaction prior to saving the enrollment.



CONFIRMATION PAGE

Upon saving a "Confirmation" page will be displayed.



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.

Enrollment Report

A	B	C	D	E	F	G	H	I
United Concordia Enrollment Report								
							Effective From:	01/01/2014
Run Date:	10/07/2014 11:44 EDT						Effective To:	09/01/2014
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