QUICKLY AND EASILY MAINTAIN ENROLLMENT AS WELL AS VIEW AND PAY INVOICES IN REAL TIME
Purpose

The Account Management portal allows the group user to self-maintain enrollments in real time, report on enrollment, and view/pay invoices online at the click of a button. This user guide has been designed to help you understand the process of establishing access to our Account Management Portal and to offer guidance for your ongoing AMP use.

Key Terms

**AMP:** Acronym used for Account Management Portal

**Policy Maker:** The individual who can enter into a legal relationship with United Concordia and has the responsibility for agreeing to and signing legal documents on behalf of the company.

**Account Security Administrator (ASA):** The AMP user who will be assigned full access to add, update and delete users on the account. This user would be the Policy Maker or would be an individual delegated by the Policy Maker.

**Subordinate User:** A user who is granted access through AMP by the ASA. The access options for enrollment are: Maintenance, Inquiry and No Access. The access options for billing are: View/Pay Bills and No Access. Access for both enrollment and billing can be set for each individual group within the account.

**Subscriber:** Individual who has enrolled him/herself and his/her Dependents for dental coverage and for whom premium payments are due and payable (i.e. employee, associate, retiree or COBRA participant).

**Dependent:** Subscriber’s spouse, domestic partner, unmarried child, stepchild, unmarried member of the Subscriber’s household resulting from a court order or placement by an administrative agency, enrolled in the Plan.

**Member:** Applies to both a Subscriber and a Dependent.

Contacts

**Phone:** To contact a representative for any questions regarding enrollment and billing, including AMP questions or concerns, call **1-888-320-3316**, option 4, Monday through Friday, 8 a.m. - 5 p.m. Eastern Standard Time.

**Email:** Questions and concerns regarding AMP can be sent to **account.mgmt@ucci.com**.

Questions or concerns regarding any other aspect of enrollment and billing should be sent to your assigned Enrollment & Billing Representative. If you have not yet received the specific contact information, call the above E&B toll-free number.
Registration Process

REGISTRATION EMAIL

Once you make the decision to utilize the Account Management Portal and UCD is notified, the policy maker will receive two emails for the registration of his or her account. For the protection of your members, the registration can only be sent to the policy maker that we have on file, or the assigned delegate. This individual will be assigned the ASA role, which in addition to all other functions in AMP, will also have access to add, delete and update users as well as delegate.

The first email will contain a unique link, which can only be used from the addressed email. The unique link will prompt for the user’s email address and a secret key.

The second email will contain the secret key, which is your 6 digit base group number.

Below is an example of what these emails will look like. Please note that when the ASA adds subordinate users, the ASA will select a 6 digit secret key and will need to communicate that with the new user. The subordinate users will only receive one registration email with the unique link.

Complete your registration for United Concordia Dental’s Account Management Portal for YOUR GROUP.

Please enter this Secret Key to complete the AMP registration process:

123456

This Secret Key is valid for the next 90 days.

You may login to AMP using your custom account activation link, which was sent to you recently in a separate email.

If you have questions, please review our Frequently Asked Questions or call Enrollment and Billing through Friday, 8 a.m. - 5 p.m. ET at 956-220-1313, option 4.
REGISTER YOUR ACCOUNT

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

Enter your email address and Secret Key. If you are registering as the ASA, this 6 digit key was sent to you in an email. If you are registering as a subordinate user, your ASA will provide you with the secret key that they established during your user set up. If you have any questions about your secret key, reach out to your Enrollment and Billing representative.

Review the information presented and select “Continue”.

![Account Management Portal Account Creation](Image)
Select your own access level. We recommend that you select “Both Account Security Administrator and Account Administrator access” regardless of your anticipated level of use.

Accept the Application Terms & Conditions.
If your group is eligible for billing access, 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

If the “I want to be an e-Bill User” option is chosen a screen is displayed for validating invoices. If you do not have your most recent invoice number, select “I DO NOT WANT TO USE EBILL”. You will be able to complete that step at a later time.
Beyond the eBill set up step, you will need to create your own personalized ID and Password.

Select “Continue”.

**Using the Portal**

**USER ROLES**

The primary user on the account is the Account Security Administrator (ASA). The ASA is responsible for maintaining the users on the account, to ensure that they have the correct access levels and are current. This would include adding, updating and deleting the additional users.

All additional users are Subordinate Users. The ASA sets the access levels for enrollment and billing for each user.

**ADDING/UPDATING A SUBORDINATE USER**

*Note: If your group sends electronic enrollment files, update capabilities will be disabled and Inquiry/View only access is available.*

Once the Account Security Administrator’s (ASA) has completed the registrations, the “My Tools” page will be displayed on the dashboard as shown below.

Select the “User Management” tab to manage access and permissions to membership data.
Select “Add New User” to enter the subordinate user’s information.

Select the user name to update the user’s information.

Complete the new or updated user information and select access level using this screen. The portal will allow you to customize “view”, “maintain” or “no access” to each group’s enrollments; and “view/pay bills” or “no access” to each billed recipient.
If you need to update an existing user, once you select the user, you will see the below screen. **Changes need to be saved individually on each tab.**

The tabs have the following functions:

**ENROLLMENT**
Will establish access level for enrollments. Available options are **“Maintenance”** (enrollment update), **“Inquiry”** (view only), and **“No Access”**.

**BILLING**
Will establish access level for viewing and paying bills. Available options are **“No Access”** and **“View/Pay bills”**.

**TRANSFER ADMINISTRATIVE RIGHTS**
Will allow the ASA to transfer ASA rights to another user. Please note that granting ASA privileges will transfer the right to add and cancel users on this account.

---

**CERTIFYING USERS**
Annual certification is required on all Account Security Administrators (ASAs) and users of the account management portal. As the ASA it is your responsibility to certify yourself as well as all delegated users within your authority. An Annual Certification email notification will be sent to the ASA when certification is due. If certification is not completed within the required timeframe, the User ID of the uncertified user(s) will be suspended. If suspension occurs, the user will not have access to the account management application.

To certify the user, simply click on the ‘Certify Now’ link. Once an individual is certified, the link will change from ‘Certify Now’ to ‘Certified’.
DASHBOARD

Once your activations are completed, AMP will open to your dashboard, on the “My Tools” tab.

Select the “Forms and Resources” tab to access enrollment and claims forms as well as various guides to assist with United Concordia procedures.

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.

COMPLETING THE BILLING ACTIVATION

If the billing validation hasn’t been completed the “Finish Activations” icon will appear on the user’s dashboard. Validation can be completed at any time by selecting this icon. All you will need is your most recent invoice number to complete your eBill activation.
Enrollment

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

ENROLLMENT SEARCH

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.

VIEW CURRENT ENROLLMENT

Upon entering valid search criteria (ID or Last/First Name), you will be able to view the current enrollment information and order ID cards.
SUBSCRIBER UPDATING

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. Selecting this option will prompt you to enter the cancel date and the reason.
- **Edit Subscriber Information or Edit Subscriber Address:** Both options will direct you to the same screen to perform updates to subscriber demographic information. You will need to enter the effective date of the change.
- **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

Select the “Add New Contract” tab.
Complete the subscriber information (Items marked with an * are required fields).

![Add New Contract Image]

Complete the “Subscriber Address” information and continue.

![Add New Contract Image]
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.
CANCELLING A CURRENT ENROLLMENT

Selecting Cancel Enrollment will prompt for a cancel date and a cancel reason. The cancel date must be within your group’s retro policy.

![Cancel Enrollment Screen]

ADDING DEPENDENTS

You can add dependents from the first view enrollment page by selecting the “ADD NEW DEPENDENT(S)” link. The contract type (Subscriber only, subscriber and spouse, subscriber and children, etc) will automatically update on the effective date that dependents are added or termed. Once selected, you will be prompted to enter the effective date and the dependent information.

![Dependent Enrollment Screen]
Reinstating coverage for previously entered dependents will bring up the following screen. Add the date for the reinstatement and select the applicable dependents.

**VIEW ENROLLMENT HISTORY**

Selecting this action will show you enrollment history for the selected contract.
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.
Billing

ACCESS MORE THAN YOUR DENTAL PREMIUM

If you participate in other plans with our parent company, e-Bill can present your dental invoice along with your medical invoices at one location. Centralizing payment of your benefits helps further streamline administrative tasks.

ACCESSING E-BILL ONLINE

Once registered go to www.unitedconcordia.com, select the “Employers” tab and input your Account Management Portal username and password. You can also log directly into e-Bill by selecting the e-Bill link located on the homepage of the Employers tab.

NAVIGATION

Navigation through e-Bill occurs via tabs along the top of the page and via hyperlinks.

Accounts Tab: View the accounts assigned to your User ID and initiate payments.

Bills Tab: View current invoices and invoice history.

Payments Tab: Set up recurring payments, establish a payment method and view payment history.

Preferences Tab: Maintain personal profile data such as name, email address and phone number. Maintain the email notifications you would like to receive monthly.
Choose the “Help” hyperlink at anytime from any screen to obtain a list of Frequently Asked Questions (FAQ).

Choose the “Contact Us” hyperlink at anytime from any screen to obtain an email address and/or phone number to which questions can be addressed.

You can also view the e-Bill “Terms and Conditions” at any time by selecting it’s respective hyperlink from any page.

If additional assistance is needed please contact our Enrollment & Billing Department toll free at 1-888-320-3316, option 3, Monday through Friday, 8 a.m. - 5 p.m. and one of our representatives will be happy to assist you.

Once logged into e-Bill you will be directed to the e-Bill “Home Page” for your account.

**HOME PAGE**

The current invoice(s) will be displayed here. View the account detail by selecting either the “Accounts” tab or the “Dental Premiums” hyperlink.

**ACCOUNTS TAB/PAPER OFF**

When an account is set to “No Paper”, the invoice method is set to “e-Bill” only.
BILLS TAB

From the “Current Invoice” screen a PDF or HTML version of the invoice is available. If there isn’t a current invoice due the “Invoice History” sub tab will need to be selected to view invoices.

BILLS-INVOICE HISTORY SUB TAB

Invoices move to history 5 days after the invoice due date. Once they are in history, they cannot be paid through e-Bill. The next invoice would contain any outstanding balances due. E-Bill retains 13 months of invoice history.

From the current and history invoice screens you can view a PDF or HTML version of the invoice by selecting the PDF hyperlink or the actual invoice hyperlink.
PDF VIEW OF THE INVOICE

![PDF View of the Invoice Image]

INVOICE REMITTANCE STUB

![Invoice Remittance Stub Image]
SELECT THE INVOICE HYPER LINK FOR THE HTML VIEW

HTML VIEW OF INVOICE

*Note The PDF view of the invoice is also available by selecting the “Click Here for Paper Payment” link.
INVOICE ROSTER SUMMARY

When selecting the “Subscriber Detail” link the invoice roster summary is displayed. A separate line is displayed for each group. The detail for each group can be viewed by selecting the “Roster Detail” hyperlink located to the left of the group number.

INVOICE ROSTER DETAIL
ROSTER DOWNLOADS

The options to view the roster detail for all groups in either PDF or XLS format is also displayed on invoice roster screen.

ROSTER DOWNLOAD PDF VERSION

The PDF version of the roster has subscriber detail broken down by group numbers.
**ROSTER DOWNLOAD - XLS**

The XLS version of the subscriber detail contains a cover page, the invoice summary and the invoice roster. This information can be easily managed by saving this workbook and sorting the roster.

**Cover page**

![Cover page image]

**ROSTER DOWNLOAD (XLS) - INVOICE SUMMARY AND INVOICE ROSTER**

**Summary**

![Invoice summary image]

**Invoice Roster**

![Invoice roster image]
MAKE A PAYMENT

Payments can be initiated from the Welcome, Account Selection, Current Invoice Screen or Payments Screen.
RECURRING PAYMENT LIST

Easily set up a recurring payment arrangement. Through this type of arrangement payments can be taken automatically as defined by the user, without logging in, each month to initiate payment.

*Note: A payment method must already be on file in order for the arrangement to be set up.

CREATE, EDIT, AND DELETE RECURRING PAYMENT ARRANGEMENT

To add a recurring payment arrangement, click the “ADD” button.

Recurring payments can be taken as many as 19 days prior to the due date, up to and including the due date but not after the due date. They can be set up to continue indefinitely or with an end date.

When setting up the arrangement select the payment method (account) from which payment should be taken, select when the payment can be taken, and how long the payment arrangement should be in effect. Select “OK”, and you will be prompted to verify the arrangement.
After verifying the arrangement, on-screen confirmation will be provided.

Once the recurring payment arrangement is set up, it can be edited or deleted by users assigned to the account.

Only the payment method (account), payment date and payment end date can be edited.
Once the delete action is chosen the user will need to confirm the deletion. Deleting the arrangement does not impact the payment method on file. The payment method (account) will remain on file and can be used for future payments.

**PAYMENT METHOD LIST**

Payment methods are established at the user level, not the account level. Each payer must establish their own payment method.
ADD PAYMENT METHOD

Checking account information is encrypted immediately after setting it up, it cannot be viewed by anyone.

If the information is entered incorrectly, you must delete the existing checking account and create a new payment method. This is a feature to protect bank account information.

EDIT PAYMENT METHOD

Only the checking account nickname can be changed.

If the bank name, account number and/or routing number need to be changed a new payment method will need to be created.
DELETE PAYMENT METHOD

If the delete option is chosen this screen is displayed for verification.

PAYMENT HISTORY

All payments made via e-Bill will be displayed in Payment History. E-Bill retains 13 months of payment history.
**VIEW PAYMENT HISTORY**

Payments can be edited or deleted when in the “Requested” status.

Payments in any other status cannot be edited or deleted.

To view payment details click the status hyperlink next to the payment you want to view.

---

**PAYMENT DETAIL**

The details for the chosen payment will be shown.

The payment date, invoice number, amount and method will be shown, among other fields.

There is a field that indicates whether the payment was made by a recurring arrangement.

The user who initiated the payment is indicated at the bottom of the screen.
PERSONAL PROFILE

The user can update their profile any time. This profile information does not update any other system.

NOTIFICATIONS

By default all notifications are selected. If you do not wish to receive them, uncheck the box(es) and save your selection.
EXIT/SIGN OUT

To Exit/Sign Out of e-Bill the “Sign Out” tab should be used.

![Image of e-Bill Sign Out page]

Welcome Jeff Jones

ABC Company
123 Market St
New York, NY 11123

Click the box below to see your bills

<table>
<thead>
<tr>
<th>Your Bill For</th>
<th>Total Amount</th>
<th>Payable Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capital Payment</td>
<td>$20.00</td>
<td>$20.00</td>
</tr>
<tr>
<td>Total</td>
<td>$20.00</td>
<td>$20.00</td>
</tr>
</tbody>
</table>