



# Group Administration

Guide for Portal Administrators

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# Purpose

**Group Administration** allows group users to maintain enrollments in real time, report on enrollment, and view/pay invoices online at the click of a button. This guide will help you understand how to establish access to and use your **Group Administration** dashboard.

## Key Terms

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

**Portal Administrator:** The only user who will be assigned full access to add, update, and delete users on the account. This user would be the Policy Maker or an individual assigned by the Policy Maker.

**Portal User:** A user who is granted access by the Portal Administrator. The access options for enrollment are: View & Modify, View Only, and No Access. The access options for billing are: View & Pay, View Only, and No Access. The access options for User Management are: Allowed and No Access. Access for both enrollment and billing can be set for each individual group within the account.

**Subscriber:** Individual who has enrolled themselves and their 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, or 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.

## Where to Learn More

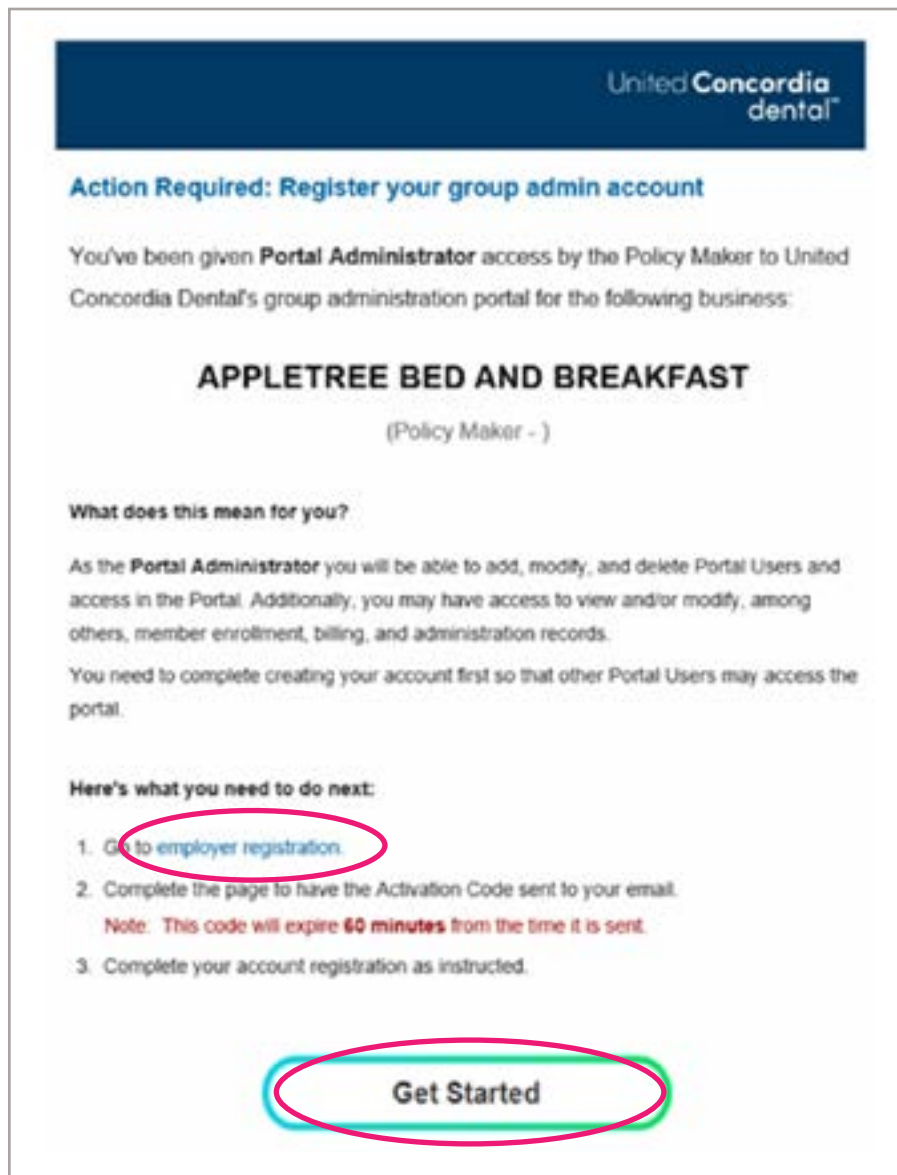
Information about **Group Administration** can be found at **UnitedConcordia.com** by selecting the **Employer** section.



# Registration Process

To register for **Group Administration**, complete the **Group Administration** form and send it to your Sales Representative or Account Manager. The form must be completed by the group Policy Maker, which is the person who can sign legal documents on the group's behalf.

Once the form is completed, the Portal Administrator will receive a **registration email**. Select the **employer registration** or **Get Started** link to start the process.



The image is a screenshot of an email from United Concordia Dental. At the top is a dark blue header with the United Concordia Dental logo. Below the header, the text reads: "Action Required: Register your group admin account". This is followed by a paragraph stating that the recipient has been given Portal Administrator access by the Policy Maker for the business "APPLETREE BED AND BREAKFAST". Below this, it asks "What does this mean for you?" and explains that as the Portal Administrator, the user can add, modify, and delete Portal Users and access various records. It then states, "You need to complete creating your account first so that other Portal Users may access the portal." Under the heading "Here's what you need to do next:", there is a numbered list: 1. Go to employer registration. (This link is circled in red in the original image), 2. Complete the page to have the Activation Code sent to your email. (A note below this step says: "Note: This code will expire 60 minutes from the time it is sent."), and 3. Complete your account registration as instructed. At the bottom of the email is a large blue button with the text "Get Started", which is also circled in red in the original image.

United Concordia  
dental™

**Action Required: Register your group admin account**

You've been given **Portal Administrator** access by the Policy Maker to United Concordia Dental's group administration portal for the following business:

**APPLETREE BED AND BREAKFAST**  
(Policy Maker - )

**What does this mean for you?**

As the **Portal Administrator** you will be able to add, modify, and delete Portal Users and access in the Portal. Additionally, you may have access to view and/or modify, among others, member enrollment, billing, and administration records.

You need to complete creating your account first so that other Portal Users may access the portal.

**Here's what you need to do next:**

1. [Go to employer registration.](#)
2. Complete the page to have the Activation Code sent to your email.  
**Note:** This code will expire **60 minutes** from the time it is sent.
3. Complete your account registration as instructed.

**Get Started**

A window will open asking for your **Phone of Record**. If you're not the Policy Maker and don't know the phone of record, your Policy Maker will need to provide the number used on the **Group Administration** form.

Once you enter the correct **Phone of Record**, click the **Send Activation Code** button. You will receive an **activation code** in a separate email.

## Create an Account

1. Get Started → 2. Provide Details → 3. Confirmation

### Request Activation Code

To receive your code, please complete your Phone of Record below.

Policy Maker	JACK APPLETREE
Portal Administrator	Kay Appletree
Phone of Record	(XXX) XXX-XX99   <a href="#">More Info</a>

**Phone of Record** ⓘ

(XXX) XXX-XX99

**Send Activation Code**

The **Enter Activation Code** window will then open. Once you receive your **6-digit activation code**, copy and paste the number into the **Activation Code** box. Make sure to read the **Employer Agreement** and agree to it by selecting the checkbox. To view and download this agreement, click on the **Employer Agreement** hyperlink.



## Create Your Login Credentials

You'll be prompted to select a **username**, **password**, and a **security question/answer**.

Once your information meets the criteria, you'll be prompted to log in with your new credentials.

## Logging In

Just log in to your account by clicking on **Log In** in the upper right-hand corner of the **UnitedConcordia.com** homepage.



Simply enter your username and password to log in.



Username

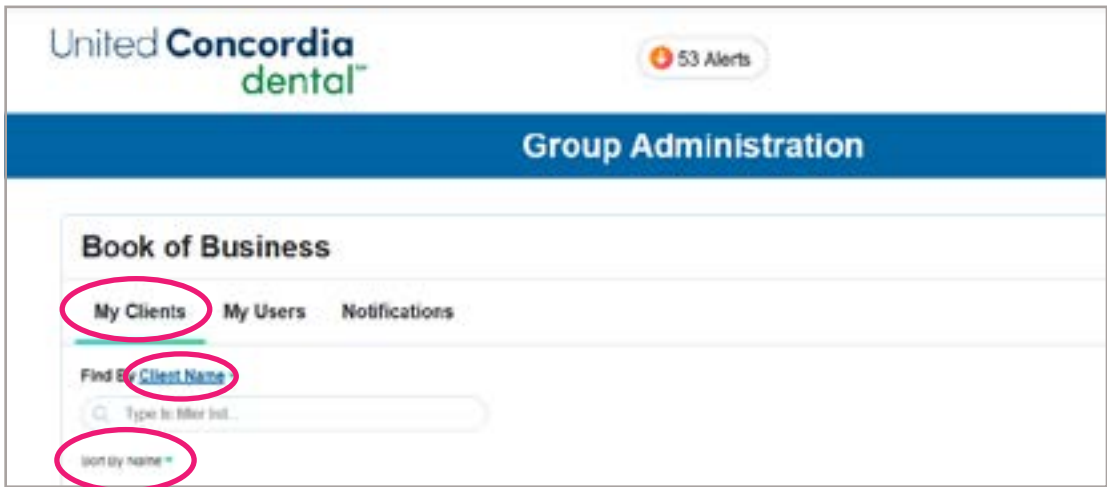
Password

Login

[Forgot username or password](#)

## Managing Multiple Clients

If you have access to multiple clients, you will be taken to your **Book of Business** page once you log in. This page shows a list of all your clients and users, and any notifications you may have.



### My Clients Tab

Selecting your **My Clients** tab will bring up a list of all clients you've been given access to. Below each client name, you'll see the **Client ID**, or **Customer Number**, along with the client's location (if there's only one).

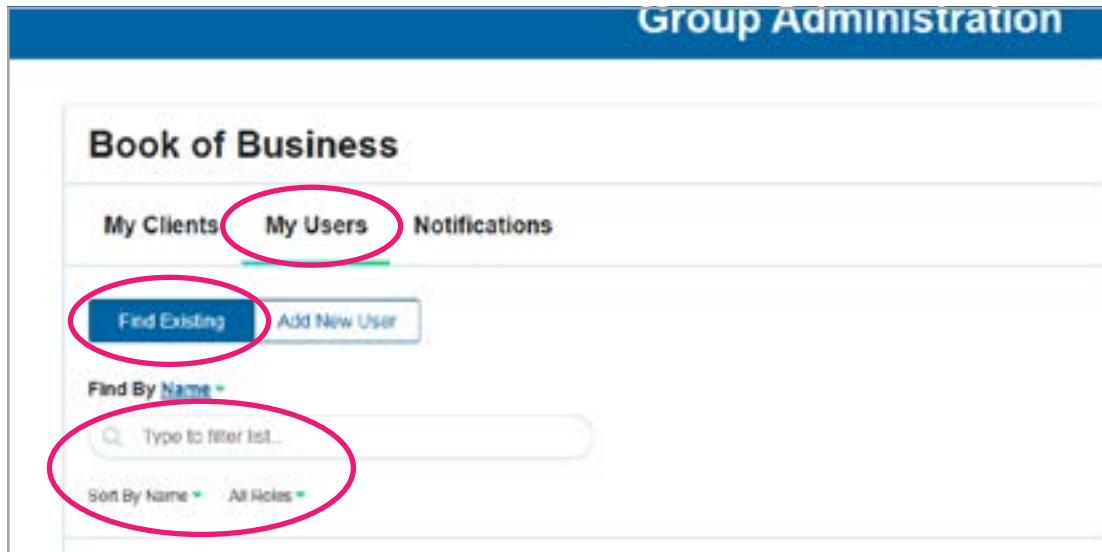
**Search Bar:** Search by **Client Name**, **Client ID**, or **Customer Number**.

**Sort:** Sort by **Name** or **ID** (includes both Customer and Client IDs).

Selecting **View Dashboard** beside any client will take you the **Dashboard** for that client.

## My Users Tab

Since you have user management to some or all clients as the **Portal Administrator**, you'll see the **My Users** tab. Select **My Users** for a list of all users to whom you have access. Being the **Portal Administrator**, or a user with user management, allows you to see your users only. If you are a user without user management for additional clients, you will not see users for those clients.



### Find Existing

Select **Find Existing** to search, sort, and filter the list.

**Search:** Search for users by **Name**, **Username**, **Email**, **Client ID**, **Customer ID**, **Recipient (billed) ID**, or **Group ID**.

**Sort:** Sort by **Name** and **Role**, such as **Employer**, **Broker**, etc.

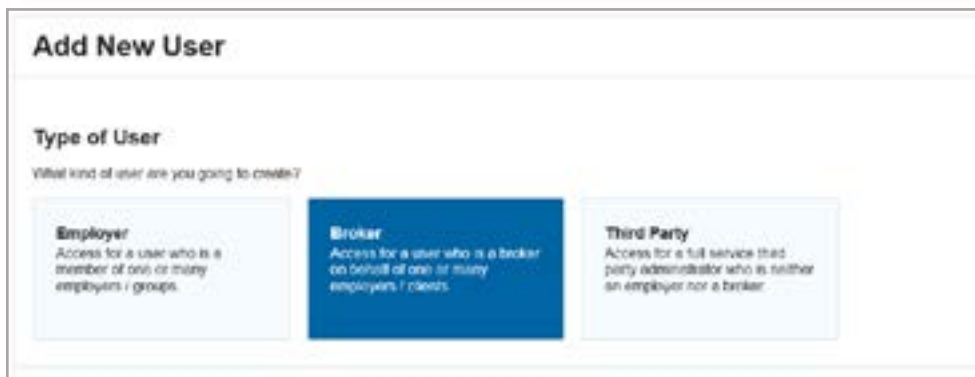
**Filter:** Filter by **Roles**, including **All Roles**, **Employers Only**, and **Brokers Only**.



## Add New User

Selecting **Add New User** allows you to add a new user to any clients/customers that you have access to.

You may add an **Employer** or if you're a TPA with user management access, you can add additional **Third Party** users.



The screenshot shows a web form titled "Add New User". Below the title is a section labeled "Type of User" with the prompt "What kind of user are you going to create?". There are three selectable options, each in a box: "Employer" (described as access for a user who is a member of one or many employers / groups), "Broker" (described as access for a user who is a broker on behalf of one or many employers / clients), and "Third Party" (described as access for a full service third party administrator who is neither an employer nor a broker). The "Broker" option is highlighted with a blue background.

## Adding an Employer

Enter the new user's name, email address, and cell phone number. Ensure that the user you're registering knows what phone number was used for their own registration.

## Adding a Broker

You cannot add a broker directly into the system yourself. This area explains the process, including the new **Group Administration** form required to grant third parties access to the group.

## Adding a Third Party

Enter the new user's name, email address, and cell phone number. Ensure that the user you're registering knows what phone number was used for their own registration.

Once the user information has been added, add the **Client ID** or **Customer Number** that you're associating the user to.



The screenshot shows a web form titled "Associations" with a sub-header "0 Clients". Below this is a text input field labeled "Add By Client ID" with a magnifying glass icon and a blue "Add" button. The entire input area is circled in red. Below the input field, the text "No Access Yet" is displayed.

When the client/customer has been added and all user information has been entered, select **Add User** at the bottom of the screen. The user will then receive a registration email.

## Notifications Tab

Selecting the **Notifications** tab under your **Book of Business** displays key activity about your clients and access (e.g. new client added).

Notifications can be sorted by **Date**, **Users**, **Client**, and **Activity**. The final column allows you to select an **x** to remove the notification (if applicable). If you have users who haven't yet completed their registrations, you can also resend invitations from this screen.

## Managing a Single Client

If you have access to only one client, you will be taken directly to that client's dashboard upon logging in.

### Client Dashboard

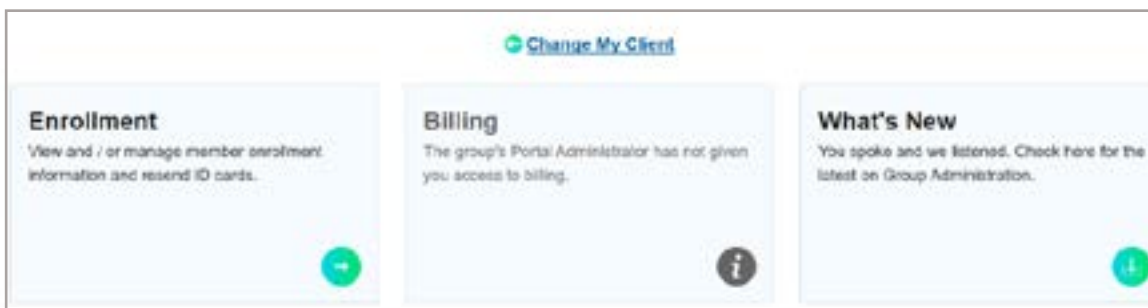
Each client's **Dashboard** shows a summary, including the Client ID or Customer Number, address, Portal Administrator information, as well as Policy Maker information (if there's only one Policy Maker for the client). Broker Access will show as ON or OFF.



## Change Portal Administrator

As the Portal Administrator, you can transfer your access to someone else. Click **Change** beside your name, and then choose from the additional users on your account. Once you transfer the Portal Administrator role to another user, you'll lose User Management access, but will retain enrollment and billing access.

From the **Client Dashboard** page, you can access **Enrollment** and **Billing** (if you have access to both). You can also select **What's New** to get the latest on **Group Administration**.



Scrolling further down will take you to **Forms & Resources**, which include user guides, claims forms, and enrollment forms.

Just below that, you will see the contact information for your Enrollment and Billing representative and your Benefits & Renewals contact information.

## Manage Access

At the top of your Client Dashboard, the **Manage Access** link enables you to add and update users associated with this client. The **Reports** link enables you to report on associated users, or jump to enrollment reports for this client.



Selecting **Manage Access** will open the list of users on this account.

**Search:** Search for your users by **Name**, **Username**, and **Email**.

**Sort:** Sort by **Name**.

**Filter:** Filter by **Status** (**All**, **Active**, **Pending**), **Roles** (**All Roles**, **Employers Only**, **Brokers Only**), and **Levels** (**Admins**, **All**).

Selecting **View Profile** beside any user will take you to that user's profile.

## Add New User

Selecting **Add New User** allows you to add a new user directly to this Client.

You may add an **Employer** or if you're a TPA with user management access, you can add additional **Third Party** users.



The screenshot shows a web form titled 'Portal Users'. Under the heading 'Type of User', there is a sub-header 'What kind of user are you going to create?'. Below this are three selectable options: 'Employer' (highlighted with a red circle), 'Broker', and 'Third Party'. Each option has a brief description of the access level. Below the user type selection is a 'User Profile' section with input fields for 'First Name' and 'Last Name'.

Type of User	Description
<b>Employer</b>	Access for a user who is a member of one or many employers / groups.
<b>Broker</b>	Access for a user who is a broker on behalf of one or many employers / clients.
<b>Third Party</b>	Access for a full service third party administrator who is neither an employer nor a broker.

**User Profile**

Name

First Name: [ ] Last Name: [ ]

## Adding an Employer

Enter the new user's name, email address, and cell phone number. Ensure that the user you're registering knows what phone number was used for their own registration.

## Adding a Broker

You cannot add a broker directly into the system yourself. This area explains the process, including the new **Group Administration** form required to grant third parties access to the group.

## Adding a Third Party

Enter the new user's name, email address, and cell phone number. Ensure that the user you're registering knows what phone number was used for their own registration.

## Access to Enrollment, Billing, and User Administration

The Portal Access Section contains the options to update access levels by group for Enrollment, Billing, and User Administration.

**Enrollment Access:** Grants users the ability to view/modify enrollment access. Access is granted individually at the group level. Access levels are **View & Modify**, **View Only**, and **No Access**.

**Billing Access:** Grants users the ability to view/pay billing invoices. Invoices are often provided at the account or recipient level. Access levels are **View & Pay**, **View Only**, and **No Access**.

**User Administration Access:** Grants users the ability to add, modify, or delete portal access. Access is granted individually at the group level. Access levels are **Allowed** and **No Access**.

Upon completion of the access levels and the user information, select **Add User** at the bottom of the screen.

## User Profile

The **blue clock** icon beside a user's name indicates the user is still pending.

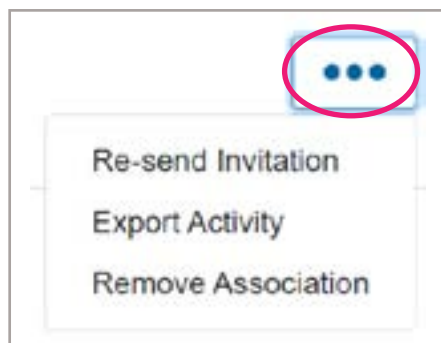


## View User Profile

If you select **View Profile** from one of the user lists, you will be taken to that user's profile page.

This page displays the user's name, role, last login date and time, or a pending status with the date of the registration email.

To the right of the user's name, you will see a box with three dots. Click the box for a drop-down menu that lets you **Re-send Invitation** (if applicable), **Export Activity** or **Remove Association**.



**Re-send Invitation:** Opens a new window with the user's information, plus **Send Invitation** and **Cancel** buttons. Selecting **Send Invitation** will re-send the registration email to the user.

**Export Activity:** Allows you to export this user's activity. You can export activity to Excel or CSV. The report will generate and be emailed to you.

**Remove Association:** Removes this user (from this client ONLY, if the user has access to multiple clients).

In the **User Profile** section, you will also see **Name**, **Username**, **Phone Number**, **Account Status**, and **email address**. You can edit Name, Phone Number, and Email Address, and force the password reset for the user.

## Portal Access

In the section below the user information, you can update the user's access levels for each group/account individually within that client/customer number.

Portal Access Edit All Access...

**Enrollment** Edit

View Only for all 2 groups

**Billing** Edit

No Access for all 2 accounts

**User Administration** Edit

No Access for all 2 groups

Alternatively, you can use the **Edit All Access** option to update Enrollment, Billing, and User Administration access for all groups with one selection.

**Edit All Access...**

**Enrollment**

View & Modify

View Only

No Access

**Billing**

View & Pay

View Only

No Access

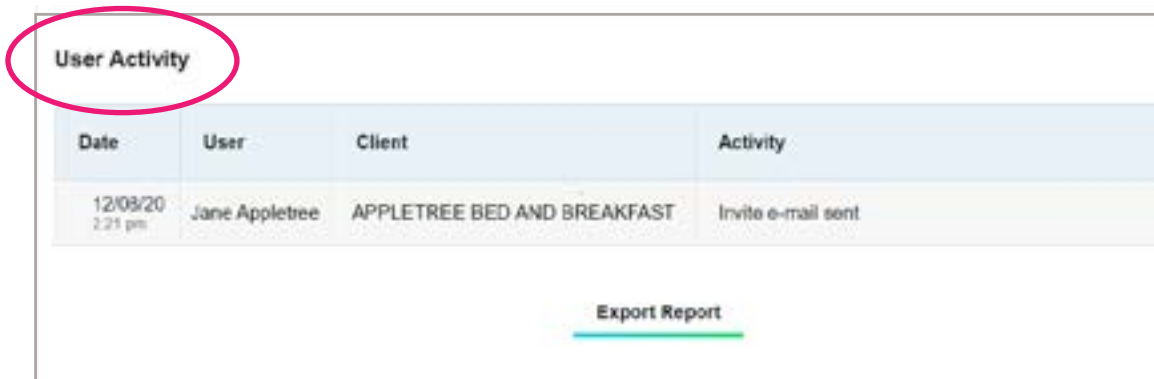
**User Administration**

Allowed No Access

Save to All

## User Activity

At the bottom of the **User Profile** page is the **User Activity** list, which shows all recent activity in the portal.



User Activity			
Date	User	Client	Activity
12/03/20 2:21 pm	Jane Appletree	APPLETREE BED AND BREAKFAST	Invite e-mail sent

[Export Report](#)

## Reports

The **Reports** tab enables you to generate the **User Summary Report**, **User Detailed Report**, and a link to the **Roster Report**.





The **Export Report** window enables you to produce two types of reports:

**User Summary Report:** Portal user information with a summary view of group access permissions, available in Excel, CSV, and PDF formats.

**User Detailed Report:** Portal user information with a detailed view of group access permissions, available in Excel and CSV formats.

**Export Report** [X]

We'll send you an email when your report is generated.

Requester: Kay Appletree  
Email: kay@appletree.com

**Report Type**

☒ User Summary Report  
Portal user information with a summary view of group access permissions.

☐ User Detailed Report  
Portal user information with a detailed view of group access permissions.

Excel CSV PDF

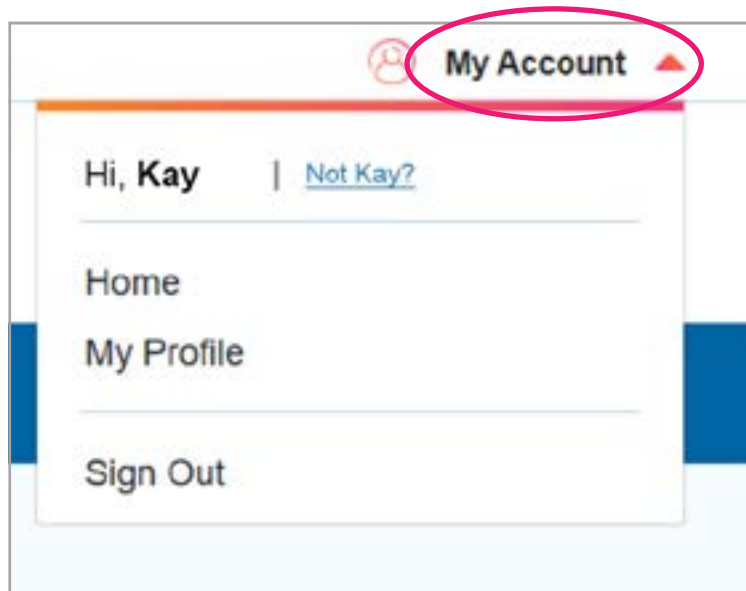
**Generate Report** Cancel

Selecting **Generate Report** prompts an email to be sent that includes the report.

Selecting **Roster Report** from the **Reports** drop-down will link to the roster reports in Enrollment.

## My Account

Selecting the **My Account** drop-down in the upper right corner shows your name and links to **Home**, **My Profile**, and **Sign Out**.



Selecting **Not Name?** beside your name will log you out and return you to the **UnitedConcordia.com** homepage.

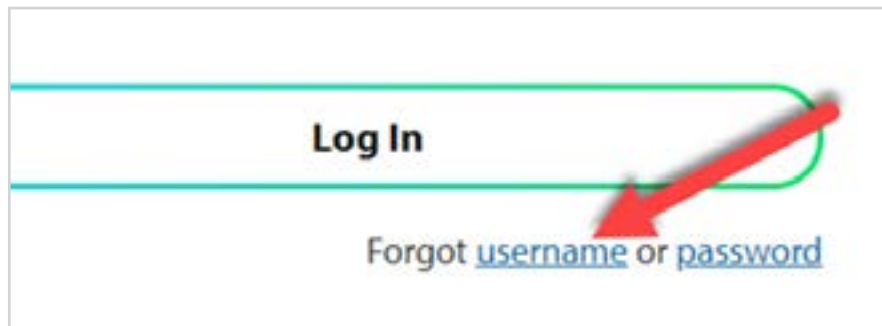
Selecting **Home** will also return you to the **UnitedConcordia.com** homepage, but you will remain authenticated and only need to return to the **Employer** section and select **Group Administration**.

Selecting **Sign Out** will log you out and return you to the **UnitedConcordia.com** homepage.

Selecting **My Profile** will take you to your **User Profile** page, which lists your own information. In addition to all the functions of the **User Profile** page for your other users, you can update your own password and security question. **NOTE:** Username cannot be updated once established. Portal Administrators who are Brokers cannot make changes to their profiles through **Group Administration**. To make changes, you must email [UCProducer@ucci.com](mailto:UCProducer@ucci.com).

## Forgot Username

To reset your password, return to the **UnitedConcordia.com** homepage and click on **Log In** in the upper right-hand corner. At the bottom of the **Log In** window, select **Forgot Username**.



You'll be prompted to enter your **Email** and your **Phone of Record**. Both of these fields need to match information associated with your profile in Group Administration. If you don't know your **Phone of Record**, contact your Policy Maker.

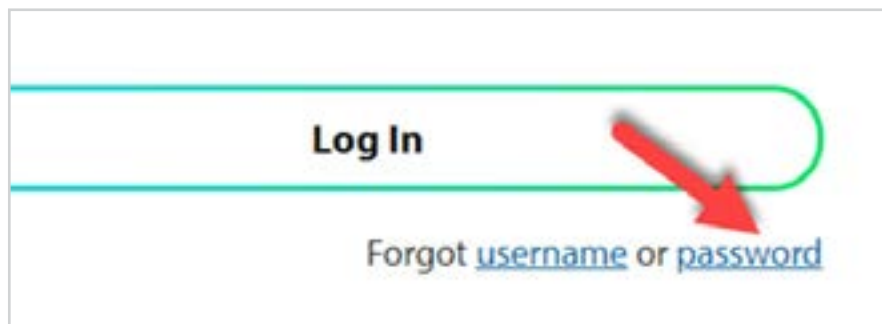
On the next screen, you will be asked to answer your security question. You will then be provided with your Username and required to enter your password to log in.

## Forgot Password

To reset your password, return to the **UnitedConcordia.com** homepage and click on **Log In** in the upper right-hand corner. At the bottom of the **Log In** window, select **Forgot Password**.

You will be prompted to enter your **Username** and your **Phone of Record**. The **Phone of Record** entered needs to match the phone number associated with your profile in **Group Administration**. If you don't know it, contact your Policy Maker.

On the next screen you will be asked to answer your security question. You will then be able to establish a new password and log in.



# Billing Overview

**eBill** is designed to streamline Premium and Administrative Fee payments by letting you manage and pay your invoices at the click of a button.

## 1. View billing information for your account

With **eBill**, you'll have access to your invoices online. Selecting an invoice allows you to view the specifics, and drill down to detail through hyperlinks — even to the Subscriber level.

## 2. Pay your dental invoice

After you've reviewed your invoice, you're ready to select your preferred payment option. Choose to set up automatic recurring payments, or initiate a monthly payment at any time by ACH or credit card. Or, simply print your invoice and submit payment via check.

Automatic email notifications let you know when your current invoice is available, so you don't have to worry about constantly checking the status of your account balance or missing a payment.

*\*Please note: Credit card payments are limited to \$2,500.*

## 3. View invoice history and online payment history

While in **eBill**, you can securely view your invoice history, as well as payments made via **eBill**, in addition to your current invoice.

## 4. Download your data for up-to-date reporting capabilities

Not only can you view your invoice summary and Subscriber detail billing report (roster), but you can also export the data. The information can be easily sorted and managed in whatever format is easiest for you.

## Granting Access

Access to **eBill** is granted through **Group Administration**. Once registration is complete, the dashboard will display the following tabs. Select the **Billing** tab to be directed to the **eBill** online bill presentment system.



## My Invoices

- Pay multiple invoices present under one billing entity using the **Pay Now** button.
- The total amount due will reflect a consolidated payable amount of all the invoices present against a given billing entity.

**My Invoices**

**Dental Administrative Fees** PAY NOW

Total amount due ⓘ  
**\$24.80**

[View Accounts / Payments](#)  
[View Current Invoices](#)

**Dental Premiums** PAY NOW

Total amount due ⓘ  
**\$87,944.29**

[View Accounts / Payments](#)  
[View Current Invoices](#)

## View Current Invoices

- Pay single invoices using the **Pay** button.
- Download invoice summaries in PDF format.
- Download Subscriber billing reports in Excel and PDF format.
- Download multiple billing reports in PDF and Excel format.

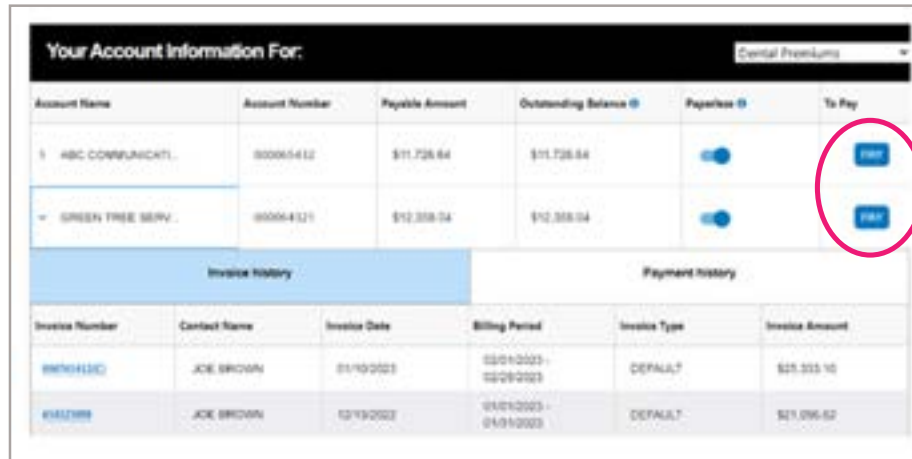
**Current Invoice for:** Dental Premiums

<input type="checkbox"/>	Invoice Number	Account Number	Invoice Type	Due Date	Payable Amount	Outstanding Balance	To Pay
<input checked="" type="checkbox"/>	13456789	000054321	SINGLE	02/02/2023	\$45,448.95	\$45,448.95	<span>PAY</span>
<input checked="" type="checkbox"/>	234567890	000043210	DEFAULT	02/02/2023	\$12,358.04	\$12,358.04	<span>PAY</span>
<input checked="" type="checkbox"/>	345678901	000032109	DEFAULT	02/02/2023	\$107.88	\$107.88	<span>PAY</span>
<input type="checkbox"/>	098765432	000065432	DEFAULT	02/08/2023	\$11,726.64	\$11,726.64	<span>PAY</span>
<input type="checkbox"/>	876543210	000098765	SINGLE	04/10/2022	\$1,653.50	\$1,653.50	<span>PAY</span>
<input type="checkbox"/>	987654321	000021098	SINGLE	01/29/2023	\$10,980.94	\$10,980.94	<span>PAY</span>

DOWNLOAD MULTIPLE REPORTS

## View Accounts

- View all the accounts present under a given billing entity.
- View all the invoices and payment transaction history.
- Pay your unpaid invoices using the **Pay** button.
- Download single billing report Excel format by clicking on the invoice number.



**Your Account Information For:** Dental Premiums

Account Name	Account Number	Payable Amount	Outstanding Balance	Paperless	To Pay
ABC COMMUNIT	00005412	\$11,726.64	\$11,726.64	<input checked="" type="checkbox"/>	<a href="#">Pay</a>
GREEN TREE SERV.	00004131	\$12,358.04	\$12,358.04	<input checked="" type="checkbox"/>	<a href="#">Pay</a>

Invoice history

Payment history

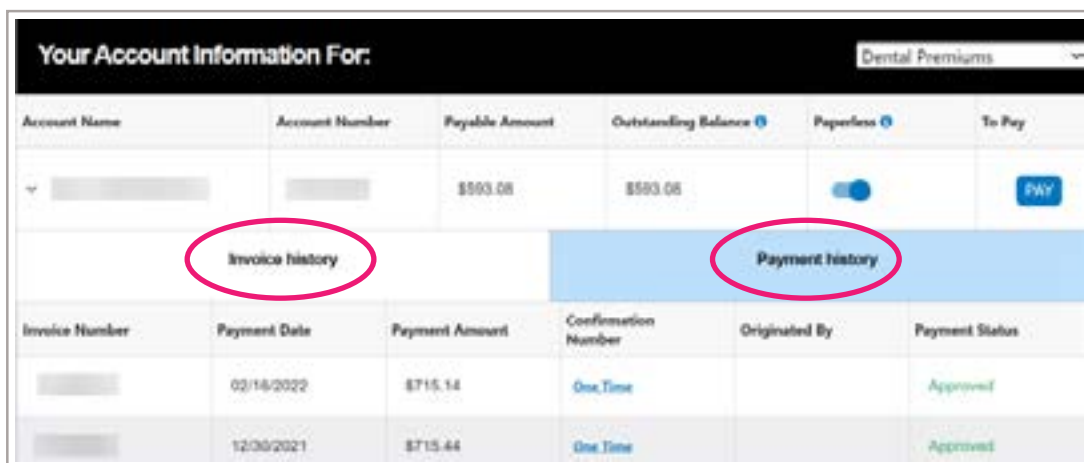
Invoice Number	Contact Name	Invoice Date	Billing Period	Invoice Type	Invoice Amount
<a href="#">00004132</a>	JOE BROWN	01/10/2023	12/01/2023 - 12/28/2023	DEFAULT	\$25,335.10
<a href="#">00004131</a>	JOE BROWN	12/19/2022	11/01/2023 - 11/19/2023	DEFAULT	\$21,096.62

### View Accounts → Invoice History

- View all current and history invoices.
- Download single billing report in Excel (XLS) format.

### View Accounts → Payment History

- View all the payment transaction history.
- View transaction status.
- Cancel scheduled payment.
- View and print transaction record.



**Your Account Information For:** Dental Premiums

Account Name	Account Number	Payable Amount	Outstanding Balance	Paperless	To Pay
		\$593.08	\$593.08	<input checked="" type="checkbox"/>	<a href="#">Pay</a>

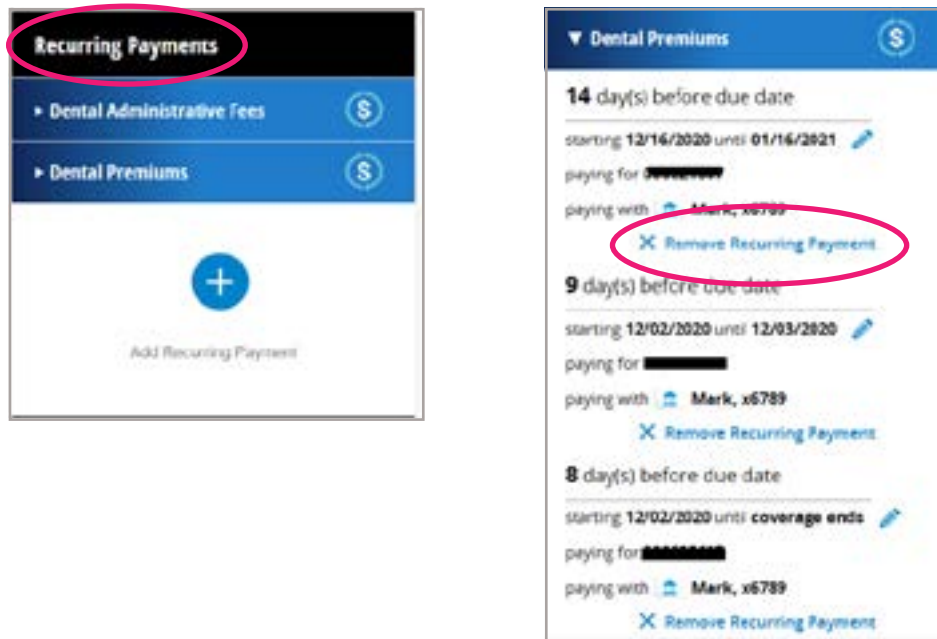
Invoice history

Payment history

Invoice Number	Payment Date	Payment Amount	Confirmation Number	Originated By	Payment Status
	02/16/2022	\$715.14	One Time		Approved
	12/30/2021	\$715.44	One Time		Approved

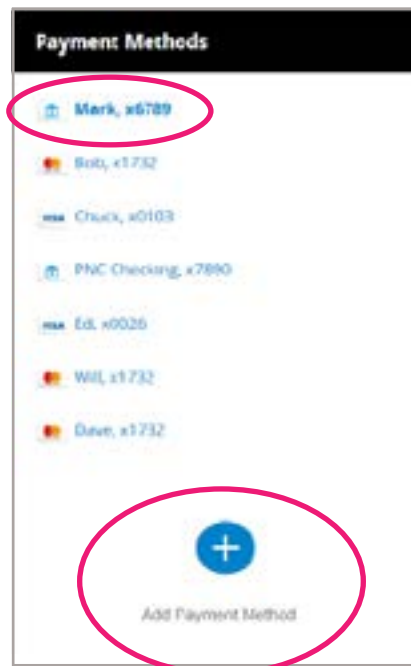
## Recurring Payments

- Set up, delete, or view single or multiple recurring payment arrangement(s).



## Payment Methods

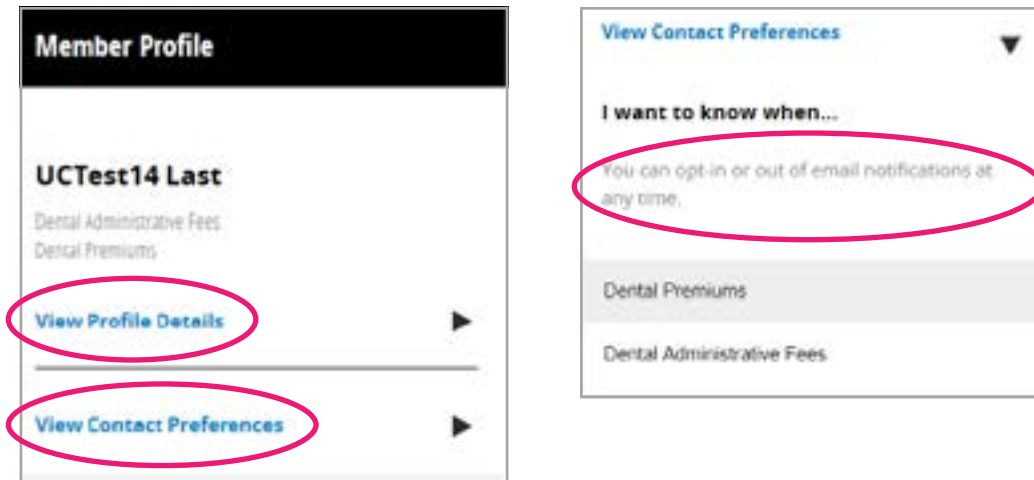
- Add, edit, delete, or view payment methods attached to your profile.





## Member Profile

- View your profile details, such as Name, Address, email, etc.
- View, opt-in, or opt-out of your email notifications using contact preferences.



## Download Reports

- View your billing reports in the **Download Reports** section.
- Downloaded reports will be available in the system for 30 calendar days.



# Enrollment Overview

By clicking on the **Enrollment** section from the dashboard, the options to **Search**, **Add New Contract**, or **Run Reports** will be displayed.



## Enrollment Search

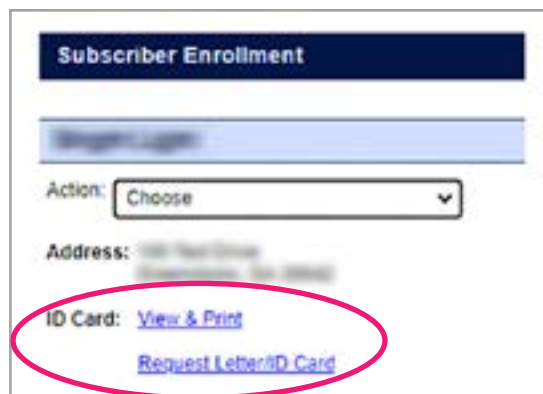
To search for an existing contract, input the member **Identification Number** or **Name**.

The **Contract Detail** screen is displayed, where you can view current enrollment and enrollment history for all family members, or select the desired function from the **Action** drop-down box.

A screenshot of the "Enrollment Search" form. At the top, there are three buttons: "Search", "Add New Contract", and "Reports". The "Search" button is circled in red. Below the buttons, the form has a title "Enrollment Search" and a subtitle "Search by Identification Number or Name". There are three input fields: "Identification Number:" with a red question mark icon, "Last Name:" with a note "At least one character of First Name is required", and "First Name:". A "Search" button is located at the bottom right of the form.

## View Current Enrollment

After entering valid search criteria (ID or Last/First Name), you can view the current enrollment information and order ID communication.



**Subscriber Enrollment**

Search/Log In:

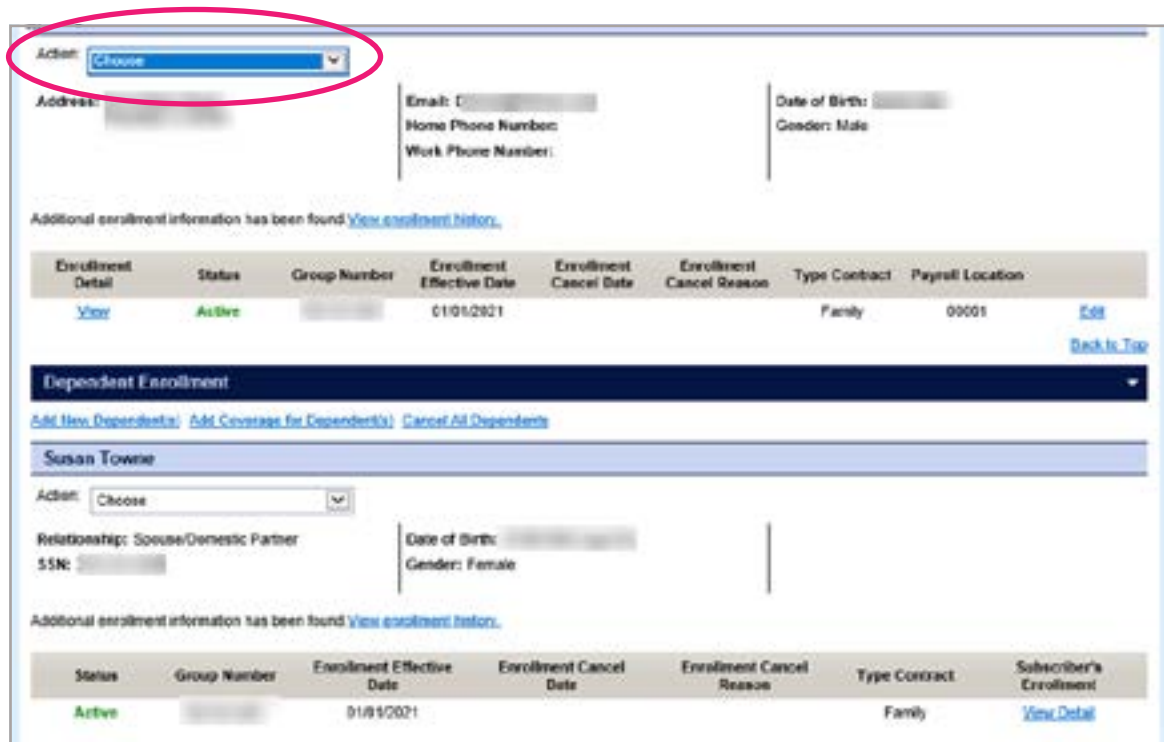
Action: Choose ▾

Address: [Redacted]

ID Card: [View & Print](#)  
[Request Letter/ID Card](#)

## Enrollment Maintenance

Users tied to groups with electronic enrollment will not have maintenance access. All enrollment updates will be included on the electronic file. For more information, contact your Enrollment and Billing representative.



Action: Choose ▾

Address: [Redacted]

Email: [Redacted]  
Home Phone Number: [Redacted]  
Work Phone Number: [Redacted]

Date of Birth: [Redacted]  
Gender: Male

Additional enrollment information has been found [View enrollment history.](#)

Enrollment Detail	Status	Group Number	Enrollment Effective Date	Enrollment Cancel Date	Enrollment Cancel Reason	Type Contract	Payroll Location	
<a href="#">View</a>	Active	[Redacted]	01/01/2021			Family	00001	<a href="#">Edit</a> <a href="#">Back to Top</a>

**Dependent Enrollment**

[Add New Dependents](#) [Add Coverage for Dependents](#) [Cancel All Dependents](#)

**Susan Towrie**

Action: Choose ▾

Relationship: Spouse/Domestic Partner  
SSN: [Redacted]

Date of Birth: [Redacted]  
Gender: Female

Additional enrollment information has been found [View enrollment history.](#)

Status	Group Number	Enrollment Effective Date	Enrollment Cancel Date	Enrollment Cancel Reason	Type Contract	Subscriber's Enrollment
Active	[Redacted]	01/01/2021			Family	<a href="#">View Detail</a>

These options are available via the **Action** drop-down box for users with update access:

**Add Coverage for Subscriber:** Enables the user to reinstate coverage, close a gap in coverage, etc.

**Cancel Enrollment:** Cancels the ENTIRE contract, including Subscriber and all Dependents. Selecting this option prompts you to enter the cancel date and the reason.

**Edit Subscriber Information or Edit Subscriber Address:** Both options lead to the same screen, where you can update Subscriber demographic information. You will need to enter the effective date of the change.

**Change Group Number:** Allows the user to cancel enrollment from one group number and add enrollment into another group number in one transaction.

**View Subscriber Enrollment History:** Enables you to view past or canceled enrollment segments.

## Adding a New Contract

Select the **Add New Contract** tab.

The screenshot shows the 'Add New Contract' form. At the top, there are three tabs: 'Search', 'Add New Contract', and 'Reports'. The 'Add New Contract' tab is selected and highlighted with a red circle and an arrow. Below the tabs, the form is titled 'Add New Contract'. On the left side, there is a 'Progress' sidebar with a list of steps: 'Subscriber Information', 'Subscriber Address', 'Dependent Enrollment', 'Other Dental Coverage', 'Summary', and 'Confirmation'. The 'Subscriber Information' step is currently selected. The main form area contains several input fields for subscriber information. The 'Identification Number' field is highlighted in yellow and has a red error message 'Field is required'. Other fields include 'Prefix', 'First Name', 'Middle Name', 'Last Name', 'Suffix', 'Date of Birth', 'Gender' (a dropdown menu), 'Group Number' (a dropdown menu), and 'Enrollment Effective Date'. A 'Continue' button is located at the bottom right of the form.

Complete the Subscriber information (items marked with an \* are required fields).

Complete the **Subscriber Address** information and continue.

The screenshot shows the 'Add New Contract' form with the 'Subscriber Address' step highlighted by a red circle. The form includes a progress bar on the left with steps: Subscriber Information (checked), Subscriber Address (active), Dependent Enrollment, Other Dental Coverage, Summary, and Confirmation. The main form area contains fields for: \*Street Line 1, Street Line 2, \*City, \*State (dropdown menu), \*Zip Code, Home Phone Number, Work Phone Number, and Email Address. A link 'Use Foreign Address' is visible in the top right corner.

Select **Add New Dependents** for Dependent enrollment or select **Continue** to skip this step.

The screenshot shows the 'Add New Contract' form with the 'Add New Dependents' button highlighted by a red circle. The form includes a progress bar on the left with steps: Subscriber Information (checked), Subscriber Address (checked), Dependent Enrollment (active), Other Dental Coverage, Summary, and Confirmation. The main form area contains the 'Add New Dependents' button and a 'Continue' button. A 'Group Information' section on the right displays details such as Effective Period, Vision Rider, Product, and Dependent Eligibility.

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

The screenshot shows the 'Add New Contract' form with the 'Other Dental Coverage (Coordination of Benefits)' step selected. A red circle highlights the step title, and a red arrow points to the 'Skip This Step' link. The form includes a progress sidebar, a 'Required Field' label, a description, and input fields for subscriber and policy information.

**Add New Contract**

**Progress**

- Subscriber Information ✓
- Subscriber Address ✓
- Dependent Enrollment ✓
- Other Dental Coverage
- Summary
- Confirmation

**Other Dental Coverage (Coordination of Benefits)**

*Required Field*

If any member has other dental coverage, please complete the following, if known.

Subscriber: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Policy Holder Name: \_\_\_\_\_

Insurance Company: \_\_\_\_\_

Policy ID Number: \_\_\_\_\_

Policy Effective Date: \_\_\_\_\_

[Skip This Step](#)

[Continue](#)

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

The screenshot shows the 'Add New Contract' form with the 'Summary' step selected. A red circle highlights the step title, and another red circle highlights the 'Edit' button. The form includes a progress sidebar, 'Save' and 'Cancel' buttons, and sections for 'Subscriber Information' and 'Subscriber Address' with their respective fields.

**Add New Contract**

**Progress**

- Subscriber Information ✓
- Subscriber Address ✓
- Dependent Enrollment ✓
- Other Dental Coverage ✓
- Summary
- Confirmation

**Summary**

[Save](#) [Cancel](#)

**Subscriber Information**

Identification Number: 9

Name: G

Date of Birth: 6

Gender: M

Group Number: 2

Enrollment Effective Date: 1

[Edit](#)

**Subscriber Address**

Domestic Address: 1

Home Phone Number: -

Work Phone Number: -

Email Address: -

Upon saving, a **Confirmation** page lets you know you've successfully added a new contract.



## Canceling 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.

A screenshot of the "Cancel Enrollment" form for Identification Number XXX-XX-6789. The form has a title bar "Cancel Enrollment" and a "Required Field" label. A note states: "Please note: Canceling the contract will cancel all members on this contract." Below this, there is a "Group:" field with a dropdown menu. The "Enrollment Cancel Date" field is highlighted with a red circle and has a red asterisk. The "Enrollment Cancel Reason" field is also highlighted with a red circle and has a red asterisk. A red text label "red is required" is next to the reason field. At the bottom right, there are "Save" and "Cancel" buttons. On the right side of the form, there is a "Group info" sidebar with fields for Group Name, Group ID, Vision Rider, and Product.

## 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.

The screenshot shows a web interface for managing dependents. At the top, there is an 'Action:' dropdown menu set to 'Choose'. Below this are input fields for 'Address:', 'Email:', 'Home Phone Number:', and 'Work Phone Number:'. A table with the following columns is visible: 'Enrollment Detail', 'Status', 'Group Number', 'Enrollment Effective Date', and 'Enrollment Cancel Date'. The table contains one row with the status 'Active' and an effective date of '01/01/2018'. Below the table is a dark blue bar labeled 'Dependent Enrollment'. Underneath this bar are three links: 'Add New Dependent(s)', 'Add Coverage for Dependent(s)', and 'Cancel All Dependents'. The 'Add New Dependent(s)' link is circled in red.

Reinstating coverage for previously entered dependents will bring up the following screen. Add the date for the reinstatement and select the applicable dependents.

The screenshot shows a screen titled 'Add Dependent Coverage for Identification Number: XXX-XX-6789'. At the top right is a 'Return to Contract' link. Below the title is an 'Enrollment' section with a red asterisk indicating a required field. It contains two date pickers: 'Enrollment Effective Date' (set to 01/01/2018) and 'Enrollment Cancel Date'. Below these is a paragraph of instructions: 'PLEASE READ CAREFULLY. This screen allows you to add coverage to multiple dependents at one time. The dependent(s) listed below do not have coverage in the group selected. By selecting the dependent(s) they will be effective on the date entered above. If a dependent is not listed, either they already have coverage or do not exist on our files. To add a new dependent(s) select the Add New Dependent.' Below this is a question: 'Which dependents would you like to include in this change?'. There are two checkboxes: 'Include All' and 'Include Selected Dependents'. Below these are two rows of checkboxes for 'Include [Name] - [Date]' and 'Include [Name] - [Date]'. At the bottom right is a link: 'Don't see a dependent? Add New Dependent(s)'. At the bottom are three buttons: 'Previous', 'Save', and 'Cancel'. On the right side is a sidebar titled 'Group Information' with a list of names.



## View Enrollment History

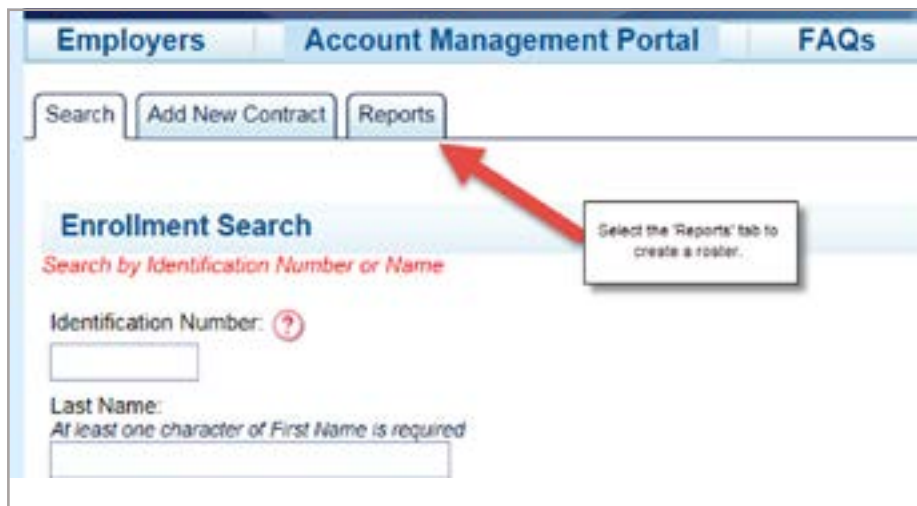
Selecting this action will show you enrollment history for the selected contract.



Enrollment Detail	Status	Group Number	Enrollment Effective Date	Enrollment Cancel Date	Enrollment Cancel Reason	Type Contract	Payroll Location
<a href="#">View</a>	Active	000000-000	04/12/2010			Parent and Children	US
<a href="#">View</a>	Cancelled	000000-000	10/01/2008	04/10/2010	Voluntary	Family	
<a href="#">View</a>	Cancelled	000000-000	11/01/2008	10/01/2008	Voluntary	Teen Adult	
<a href="#">View</a>	Cancelled	000000-000	10/01/2008	11/01/2008	Change in Coverage	Individual Male	

## Reports

Users can run rosters with real-time data. You can create and print roster reports containing their group members. To access the rosters, click the **Reports** tab.



**Employers** | **Account Management Portal** | **FAQs**

[Search](#) [Add New Contract](#) [Reports](#)

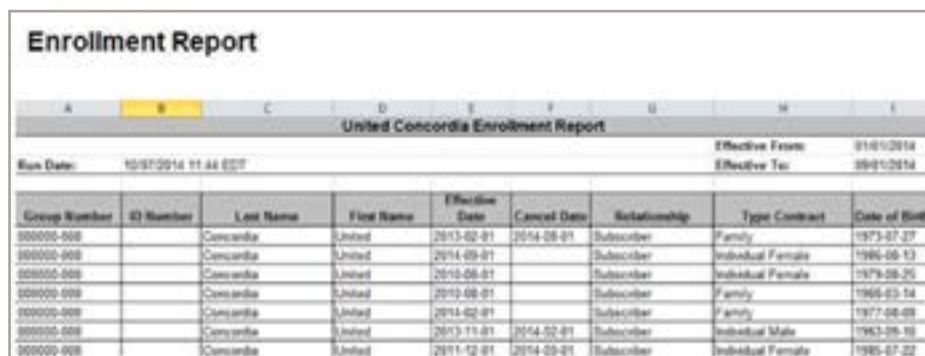
**Enrollment Search**  
Search by Identification Number or Name

Identification Number:

Last Name:   
At least one character of First Name is required

Select the 'Reports' tab to create a roster.

This report can also be accessed by selecting **Roster Report** from the **Reports** tab on the main **Group Administration** page.



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	1996-06-13
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	2013-02-01		Subscriber	Family	1977-08-09
000000-000		Concordia	United	2013-11-01	2014-02-01	Subscriber	Individual Male	1963-08-10
000000-000		Concordia	United	2011-12-01	2014-03-01	Subscriber	Individual Female	1965-07-22

# Frequently Asked Questions

## Registering for Group Administration

### How do I gain access to Group Administration?

1. Contact your Sales or Sales Support Team/Executive.
2. Complete a **Group Administration** form.
3. Return the form to your Sales or Sales Support Team/Executive.
4. The Portal Administrator designated by your Policy Maker will complete the registration and can then add additional users.

### How can I register if I accidentally deleted or never received the registration email?

Contact your assigned Enrollment and Billing representative, who can easily resend your registration email.

## Paying Invoices

### How do I add a payment method?

1. Click the blue **Plus** button on the **Payment Methods** section.
2. Select your payment method.
3. Fill out the required fields.
4. Click the **Add Payment Method** button.

### How do I edit a payment method?

1. Visit the **Pay Invoice** or **Payment Methods** section.
2. Select the payment method you would like to edit.
3. Change the editable fields. (Note: You are only permitted to modify certain fields.)
4. Click **Save**.

### How do I remove a payment method?

1. Visit the **Pay Invoice** or **Payment Methods** section.
2. Select the payment method you would like to remove.
3. Click the **Remove Payment Method** link.
4. Click **Remove**.

### How do I set up recurring payments?

1. Visit the **Recurring Payments** section.
2. Click the **Add Recurring Payment** button.
3. Fill out the required fields.
4. Click the **Set Recurring** button.

### How do I cancel recurring payments?

1. Visit the **Recurring Payments** section.
2. Click the **Remove Recurring Payment** link.
3. Click the **Yes, Remove** button.

## Viewing Billing Reports

### How do I view or download single billing reports?

1. Click the **Invoice Number** to view or download billing reports from the **View Current Invoices** or **Invoice History** section.
2. Select your preferred report format: PDF or Excel.
3. Click the **Confirm** button.

### How do I download multiple billing reports?

1. Select the check boxes next to the invoices from the **View Current Invoices** section.
2. Click the **Download Reports** button to download billing reports.
3. Select your preferred report format: PDF or Excel.
4. Click the **Confirm** button.

**Note:** Your report will be downloaded in a zip file and available under the **Download Reports** section.

## Updating Your Details

### How do I update my personal details?

1. Go to the **Member Profile → View Profile Details** section.
2. Click the **Pencil** icon next to the field you want to edit.
3. Edit the required field.
4. Click the **Save** button.

**Important Notice:** Any changes to your profile information should be communicated to your Enrollment and Billing representative, so the same changes can be made to your bill account information.

### How do I update my email preferences?

1. Go to the **Member Profile → View Contact Preferences** section.
2. Select/Deselect your notification preference.
3. Click the **Save** button.

## Resolving Access Issues

### What if I can't access some eBill system features?

If you don't have access to some of the **eBill** system features, please contact your Client Manager or **Contact Us**.

### What if I'm locked out of the system?

If you're locked out of the **eBill** system, please **Contact Us**.