Group Administration

Guide for Portal Users

Contents

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.

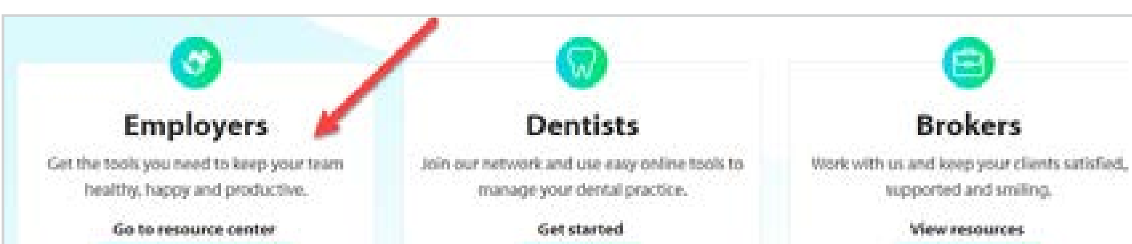
Subscriber: Individual who has enrolled themselves and their Dependents for dental coverage and for whom premium payments are due and payable (i.e. employee, associate, retiree, or COBRA participant).

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.

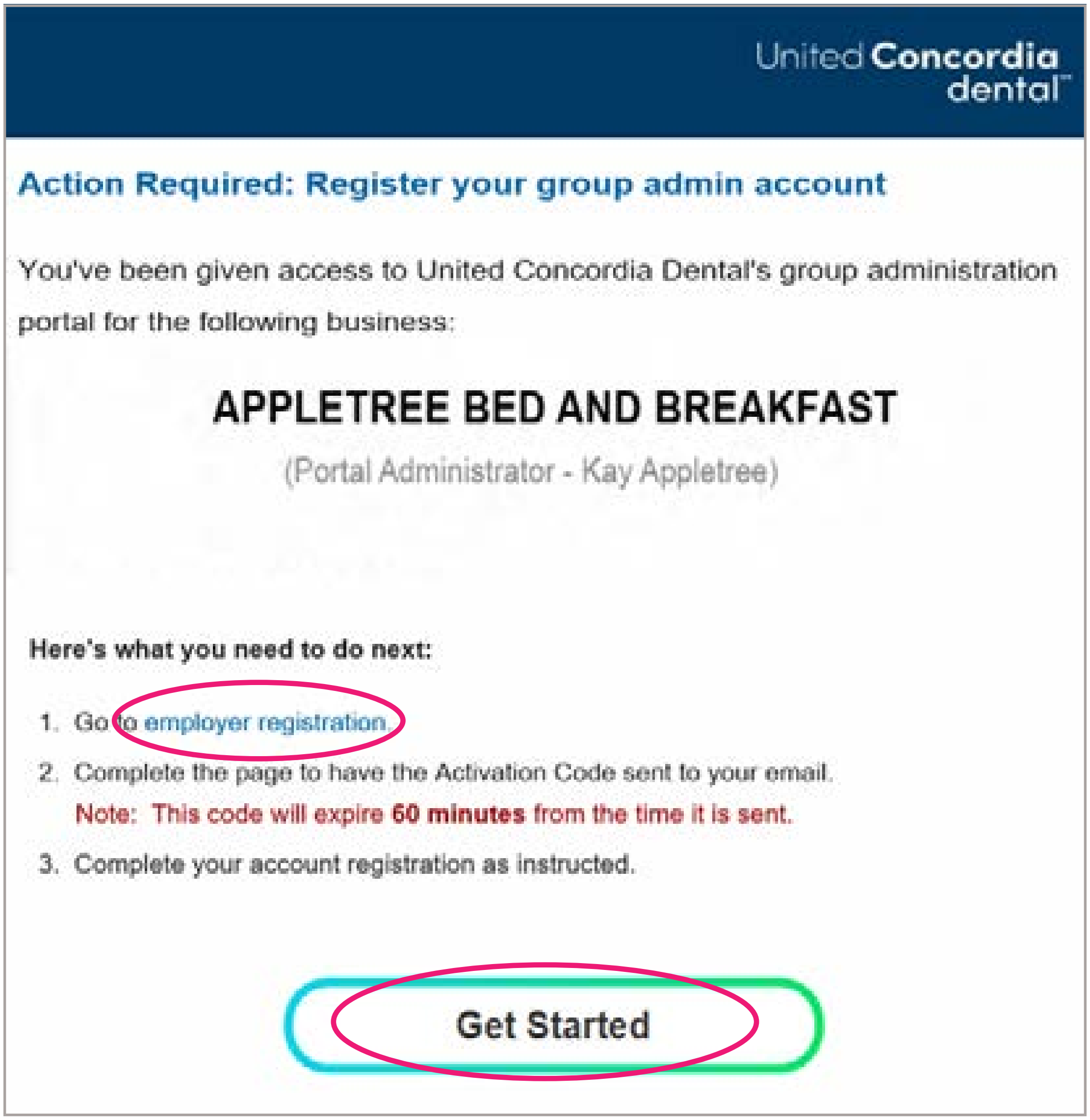
Where to Learn More

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



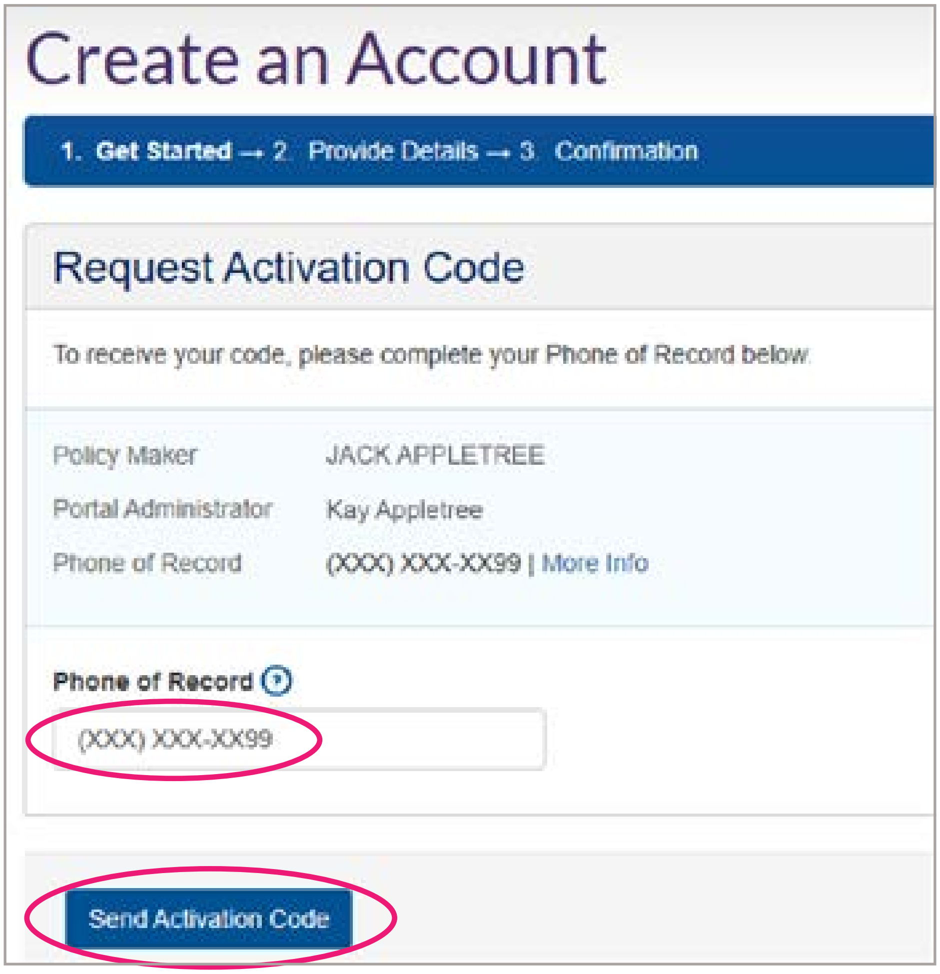
Registration Process

Your Policy Maker must first designate a Portal Administrator, who can add additional users after completing their own registration process. Once you've been added by your Portal Administrator, you will receive a **registration email**. Select the **employer registration** or **Get Started** link to start your registration process.



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.



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.

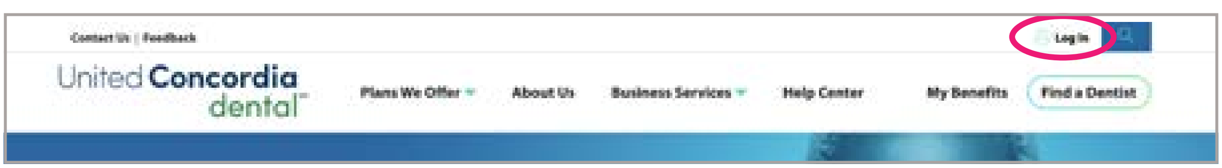
Create Your Login Credentials

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

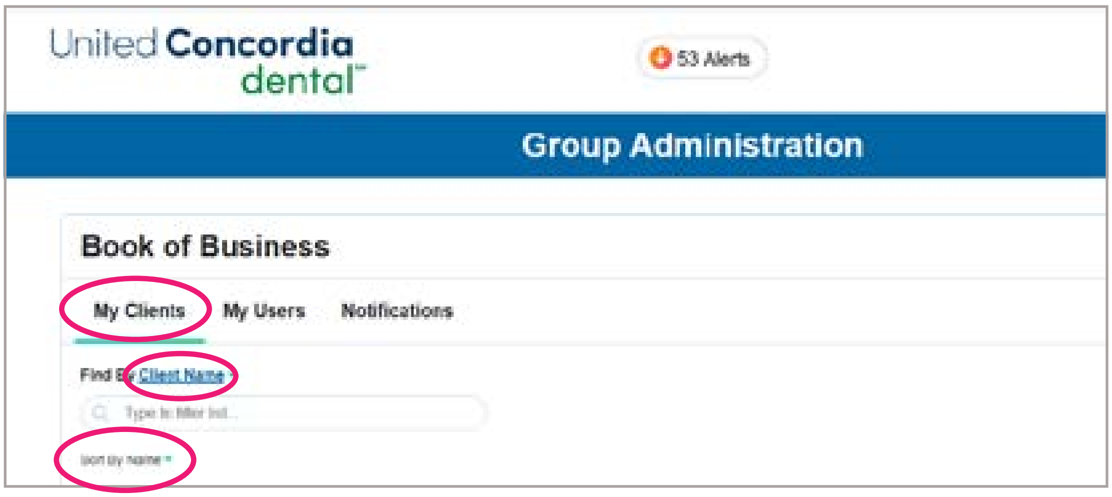
Just log in to your account by clicking on **Log In** in the upper right-hand corner of the **UnitedConcordia.com** homepage.



Simply enter your username and password to log in.

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 (if you have user management), 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).

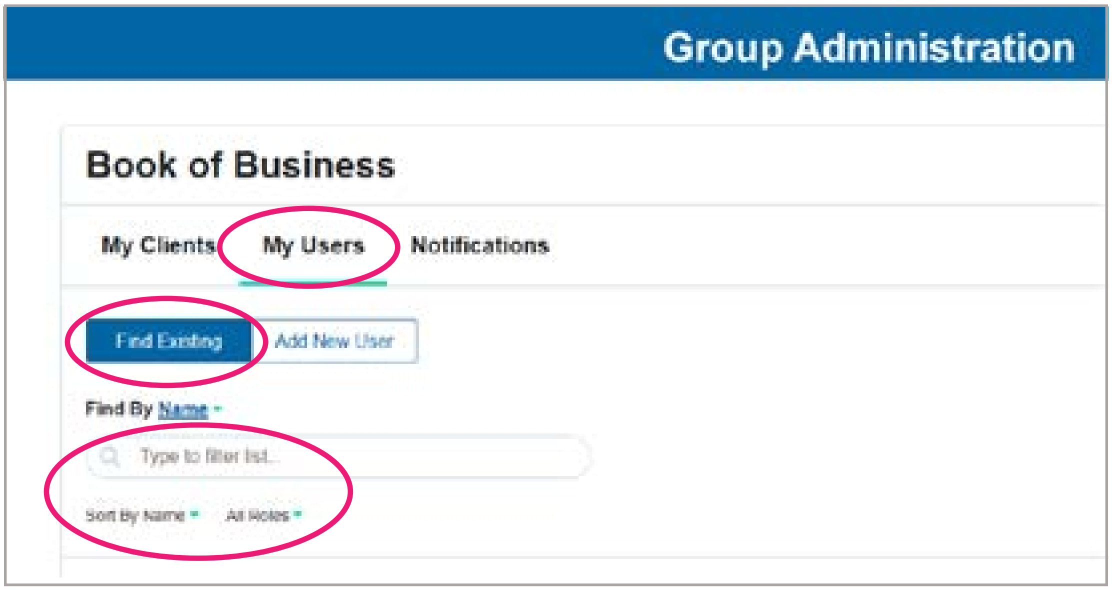
Search Bar: Search by **Client Name**, **Client ID**, or **Customer Number**.

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

If you have user management to some or all clients, you'll see the **My Users** tab. Select **My Users** for a list of all users to whom you have access. Please note that being 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.

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.

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.

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

If you have user management, you'll see links for **Manage Access** and **Reports** 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**.

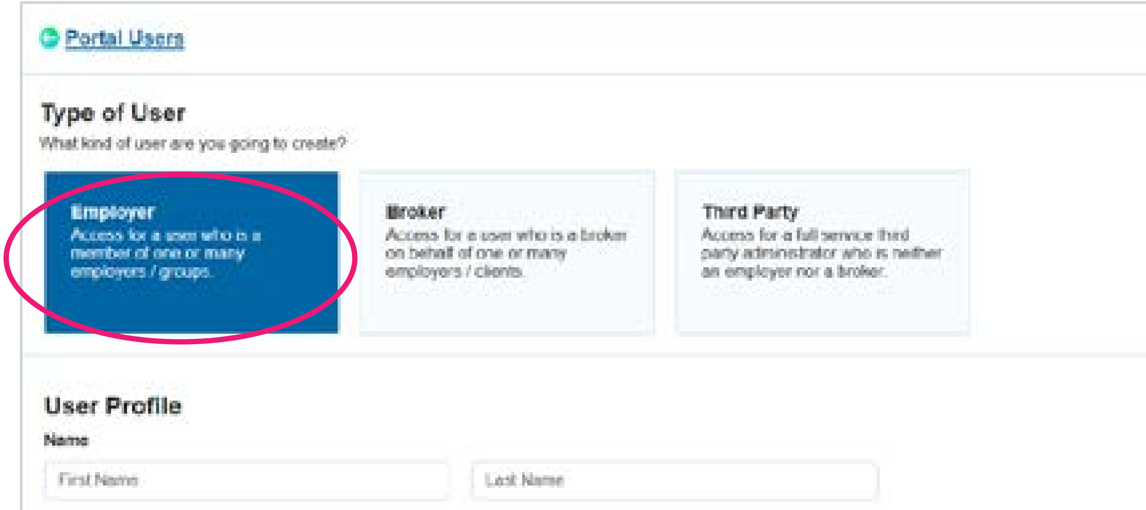
Filter: Filter by **Status (All, Active, Pending)**, **Roles (All Roles, Employers Only, Brokers Only)**, and **Levels (Admins, All)**.

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.



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: If you're a user with user administration access, you won't have access to add additional users with user management access. Only the Portal Administrator can add additional users with user management access.

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

User Profile

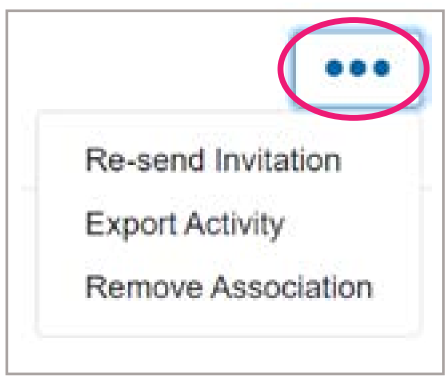
The **blue clock** icon beside a user's name indicates the user is still pending.

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.

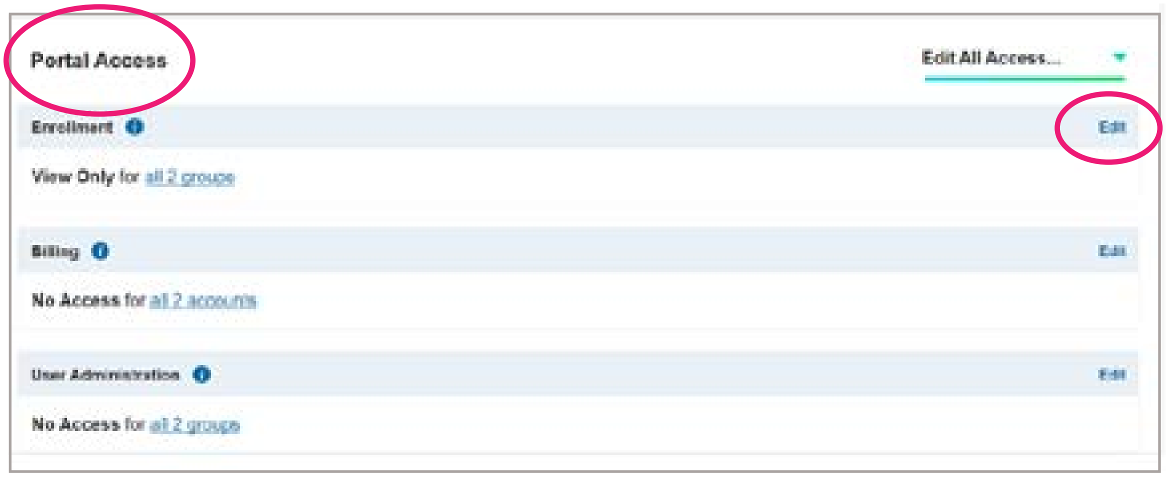
Export Activity: Allows you to export this user's activity. You can export activity to Excel or CSV. The report will generate and be emailed to you.

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

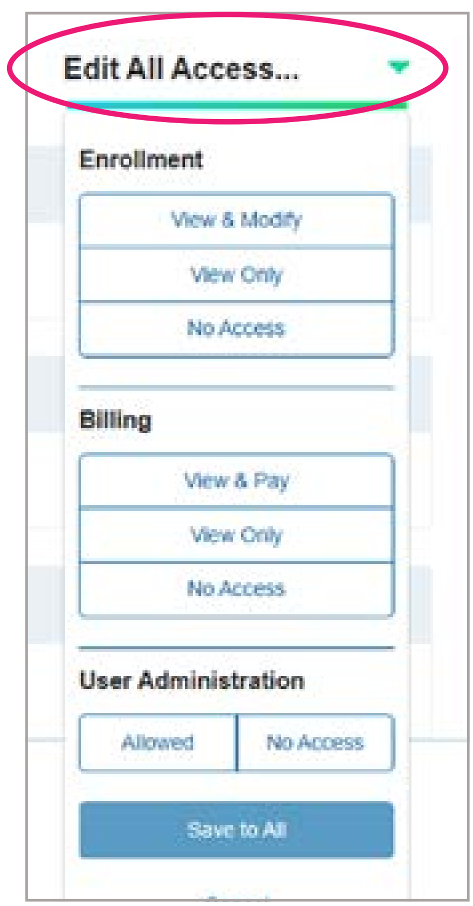
In the **User Profile** section, you will also see **Name**, **Username**, **Phone Number**, **Account Status**, and **email address**. You can edit Name, Phone Number, and Email Address and force the password reset for the user.

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.

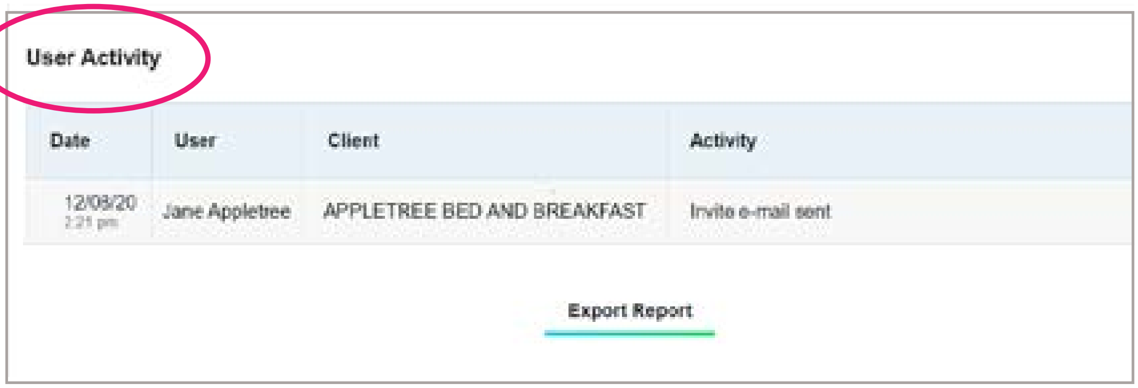


Alternatively, you can use the **Edit All Access** option to update Enrollment, Billing, and User Administration access for all groups with one selection.



User Activity

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



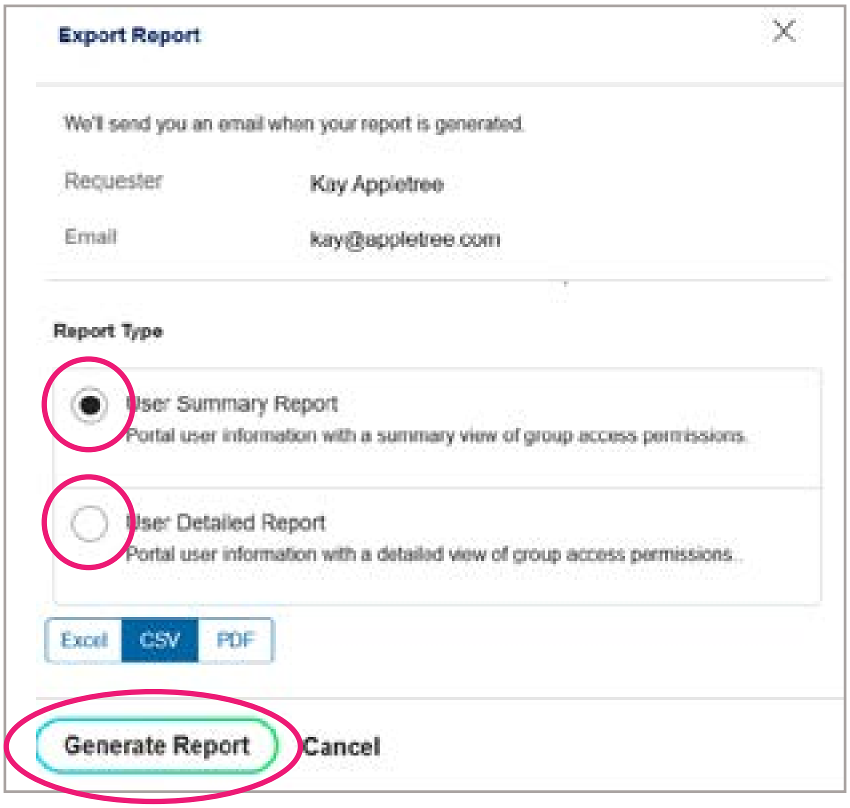
Reports

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.

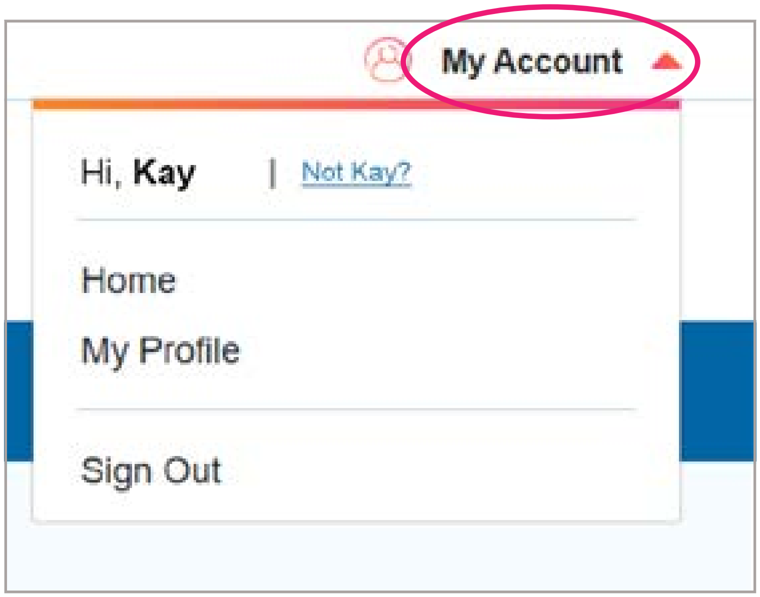


Selecting **Generate Report** prompts an email to be sent that includes the report.

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.

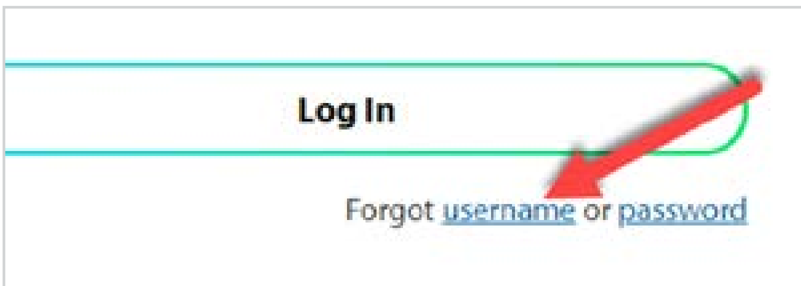
Selecting **Home** will also return you to the **UnitedConcordia.com** homepage, but you will remain authenticated and only need to return to the **Employer** section and select **Group Administration**.

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:** Usernames 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**.

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**.

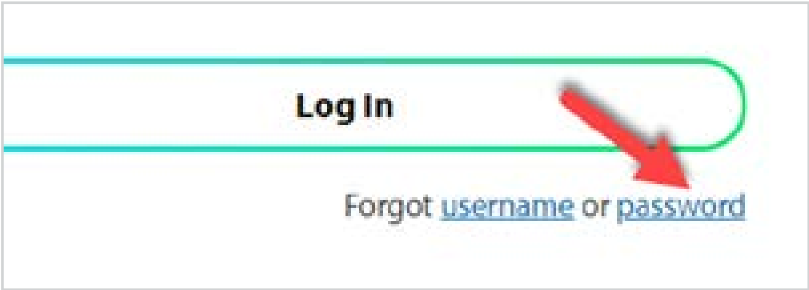


You'll be prompted to enter your **Email** and your **Phone of Record**. Both of these fields need to match information associated with your profile in **Group Administration**. If you don't know your **Phone of Record**, contact your Policy Maker.

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 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 Portal Administrator or 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.

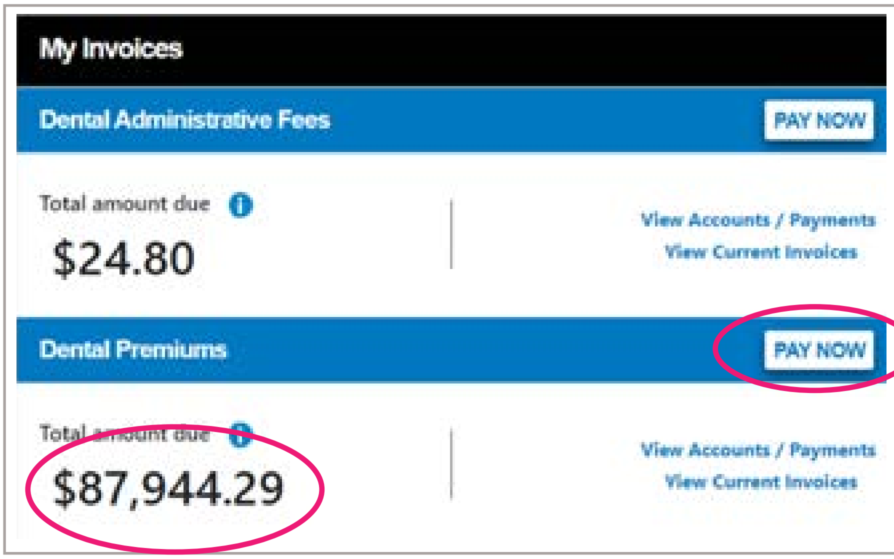
4. **Download your data for up-to-date reporting capabilities**
   Not only can you view your invoice summary and Subscriber detail billing report (roster), but you can also export the data. The information can be easily sorted and managed in whatever format is easiest for you.

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.

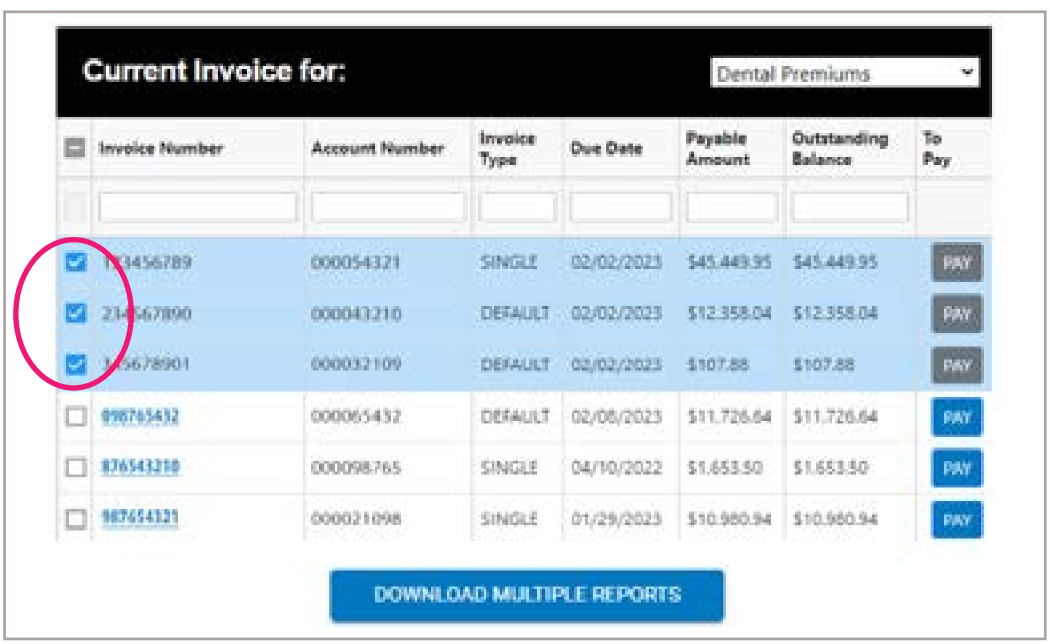
My Invoices

- 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.



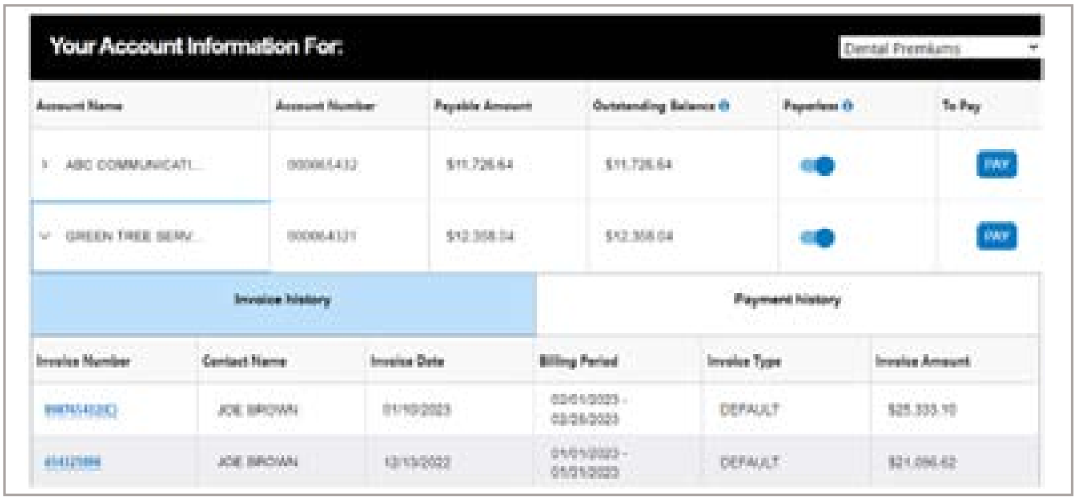
View Current Invoices

- 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.



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.

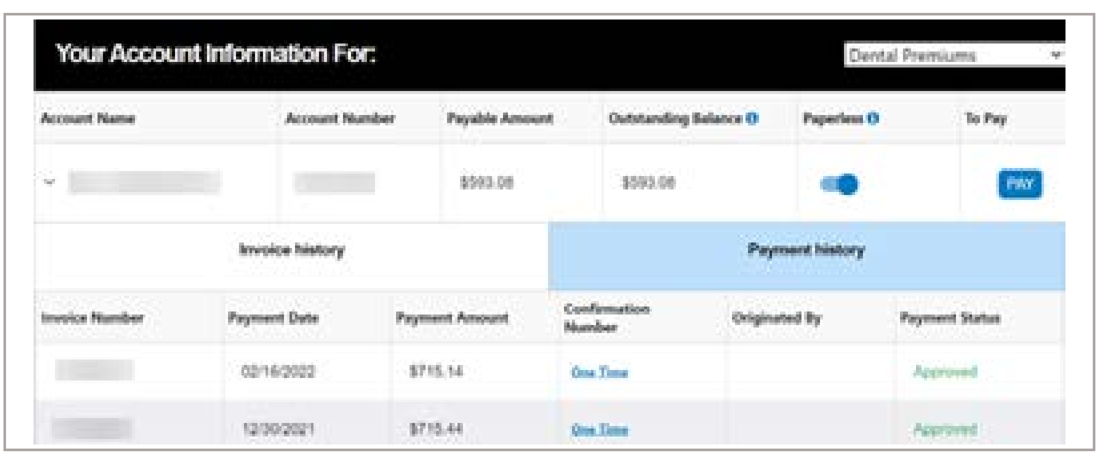


View Accounts → Invoice History

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

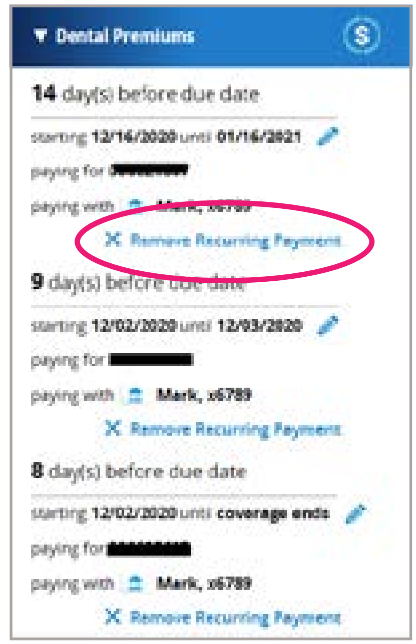
View Accounts → Payment History

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



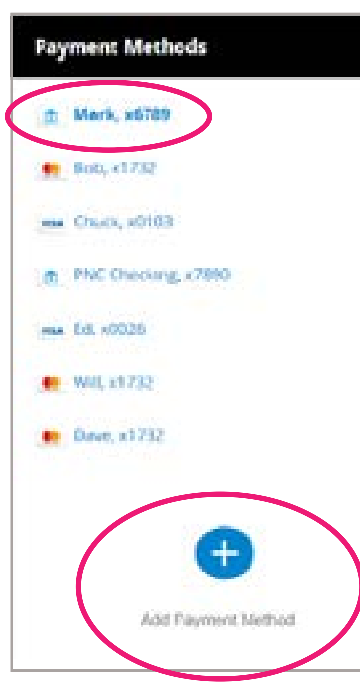
Recurring Payments

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



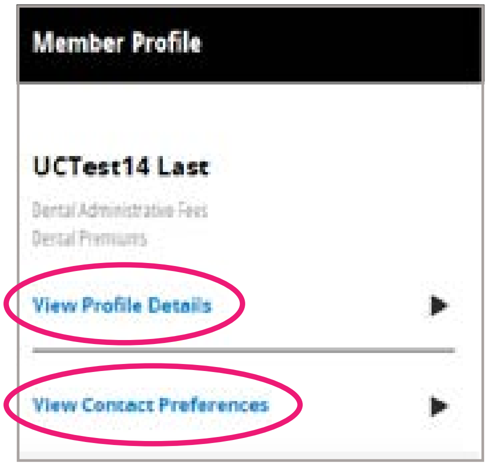
Payment Methods

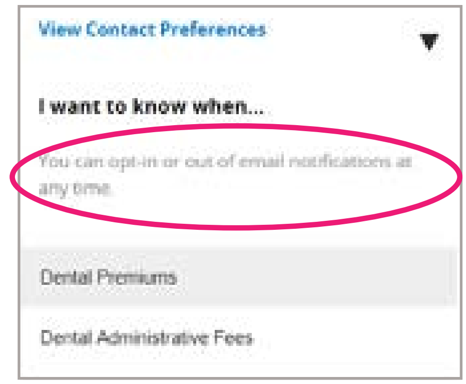
- Add, edit, delete, or view payment methods attached to your profile.



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.

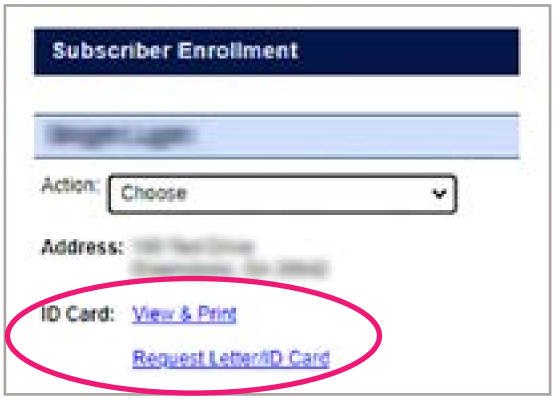
Enrollment Search

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.

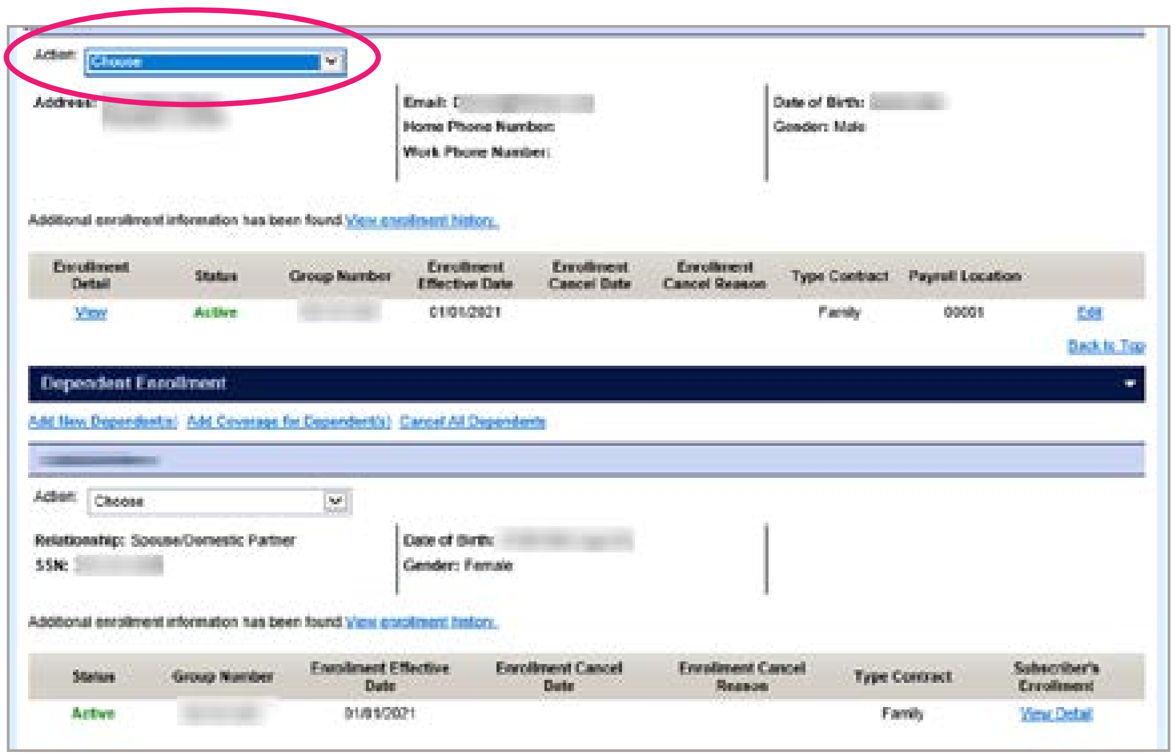
View Current Enrollment

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



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.



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.

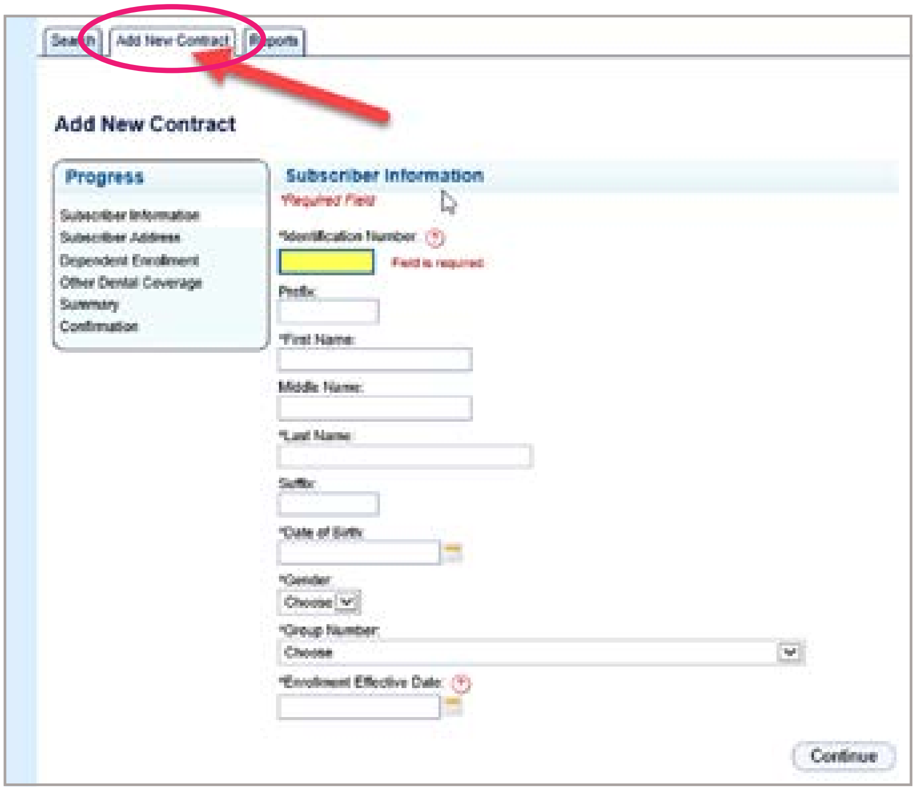
Edit Subscriber Information or Edit Subscriber Address: Both options lead to the same screen, where you can update Subscriber demographic information. You will need to enter the effective date of the change.

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 cancelled enrollment segments.

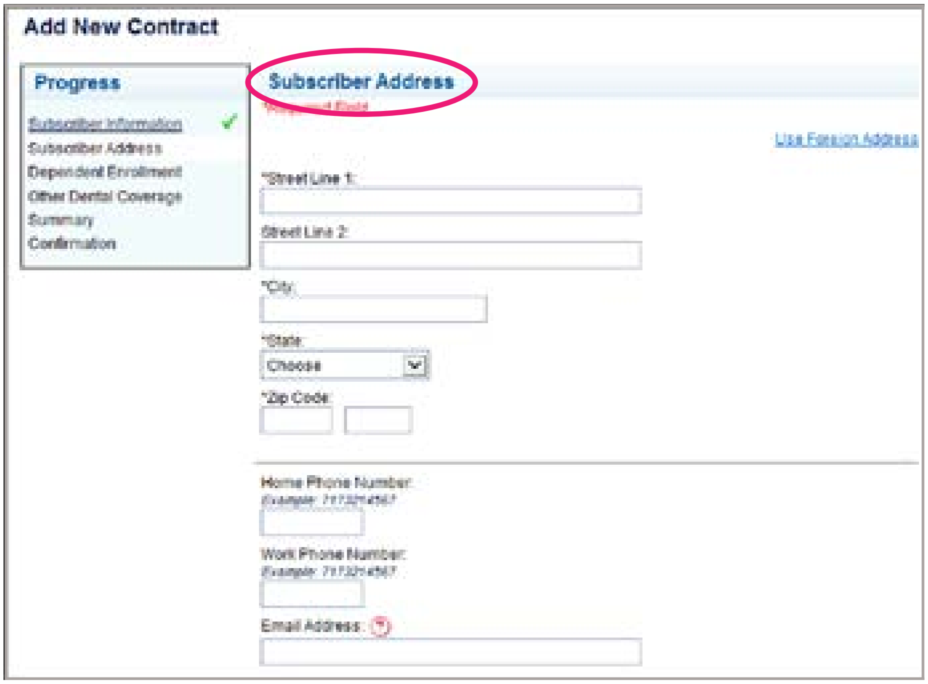
Adding a New Contract

Select the **Add New Contract** tab.

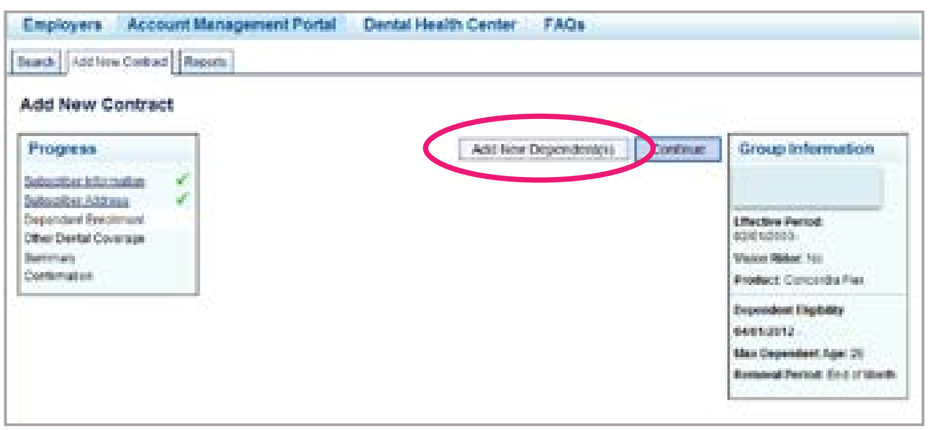


Complete the Subscriber information (items marked with an * are required fields).

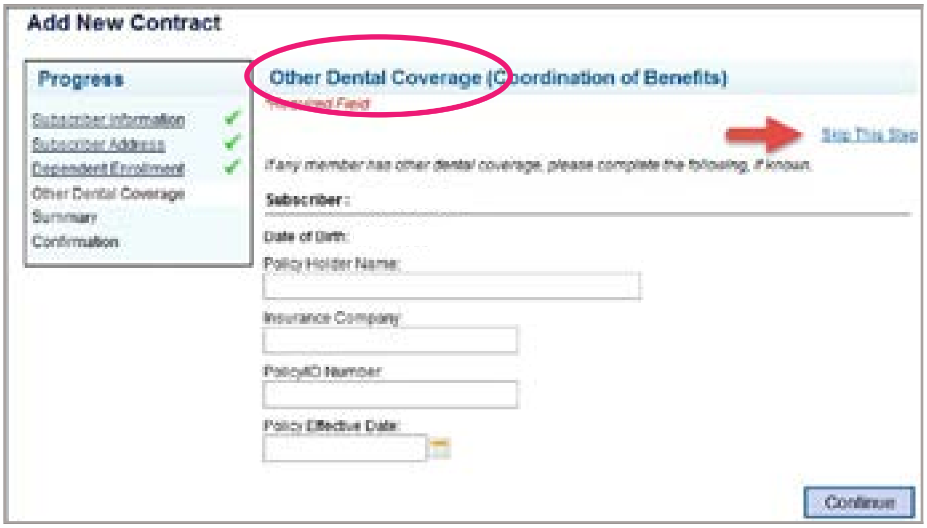
Complete the **Subscriber Address** information and continue.



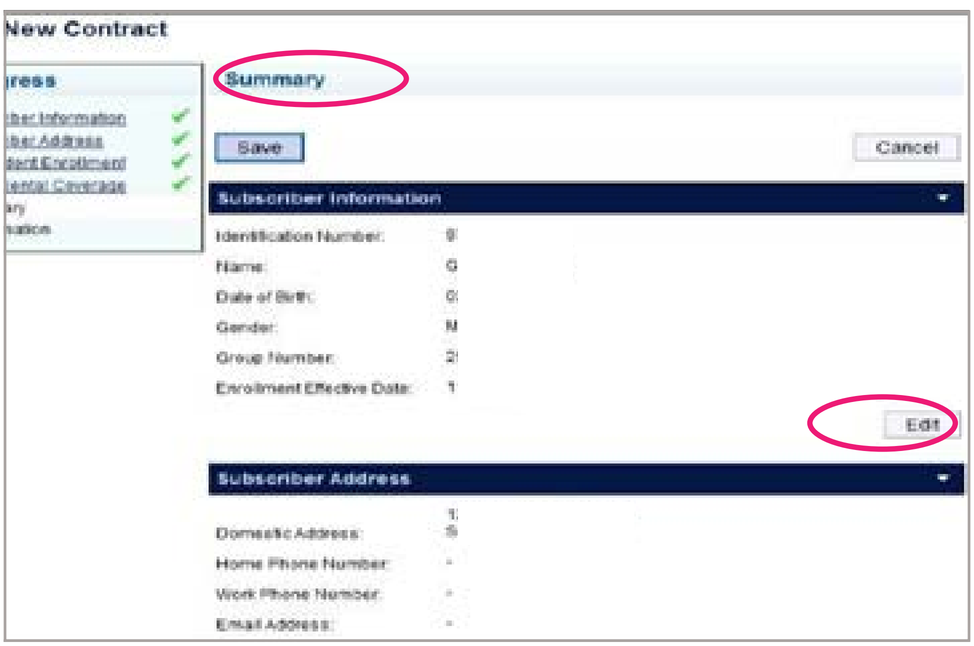
Select **Add New Dependents** for Dependent enrollment or select **Continue** to skip this step.



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



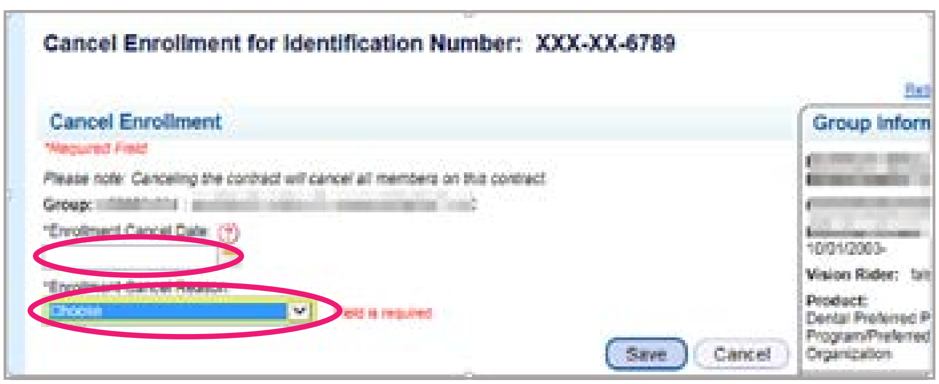
The **Summary** page is displayed with the option to edit any information listed or to cancel the transaction prior to saving the enrollment.



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

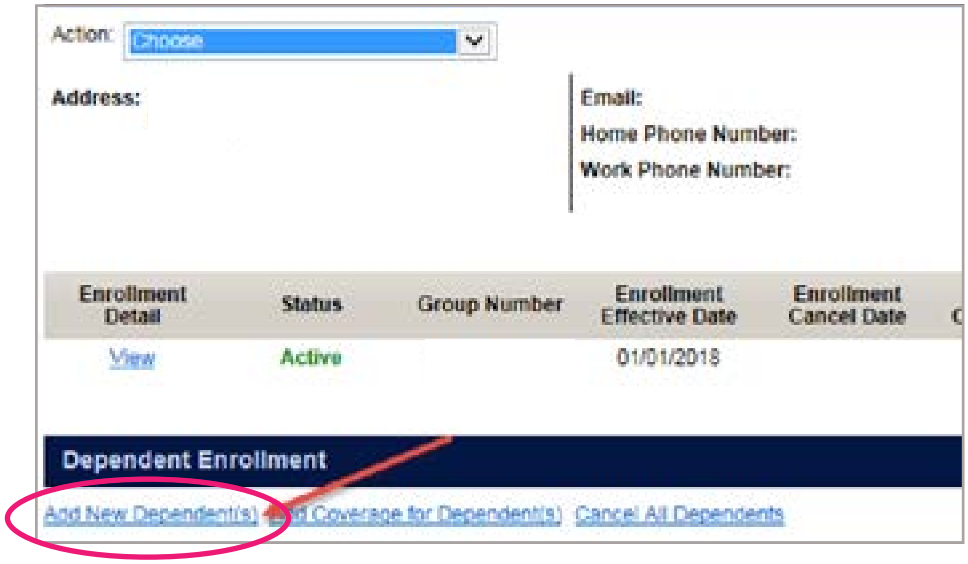
Canceling a Current Enrollment

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

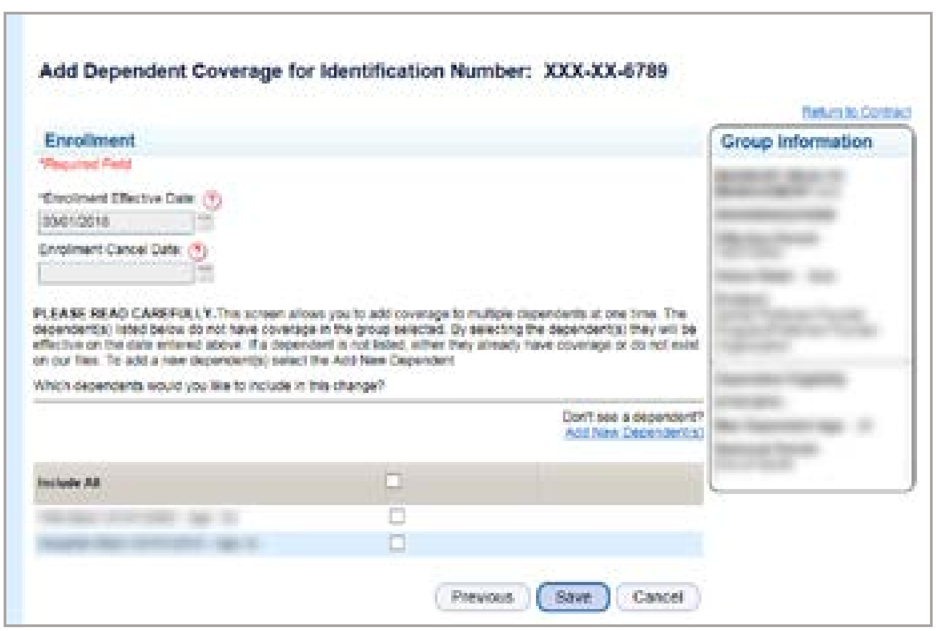


Adding Dependents

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.



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

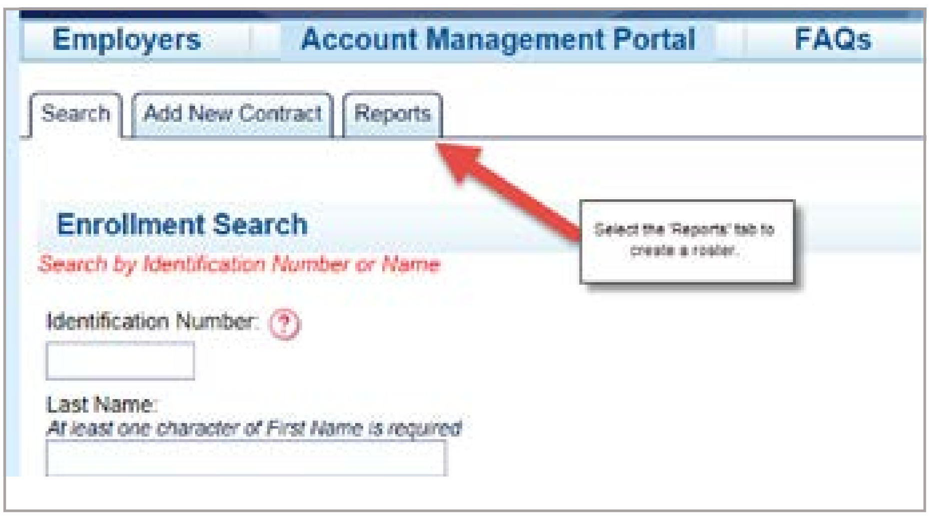


View Enrollment History

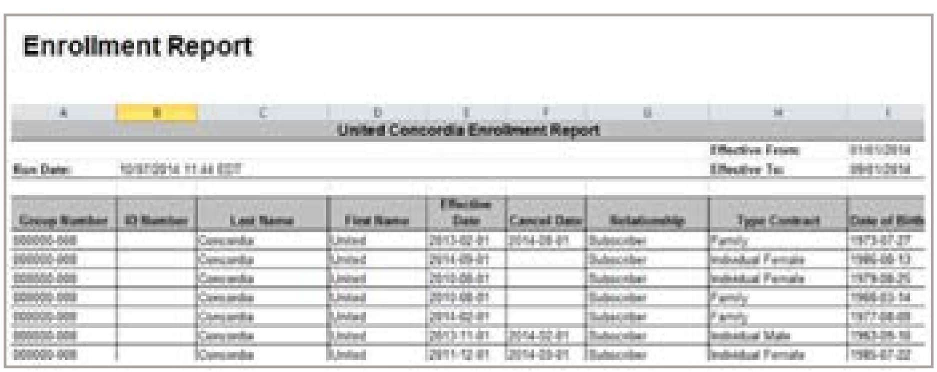
Selecting this action will show you enrollment history for the selected contract.

Reports

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.



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



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 re-send 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**.