EMPLOYER PORTAL USER MANUAL

August 2019 Release
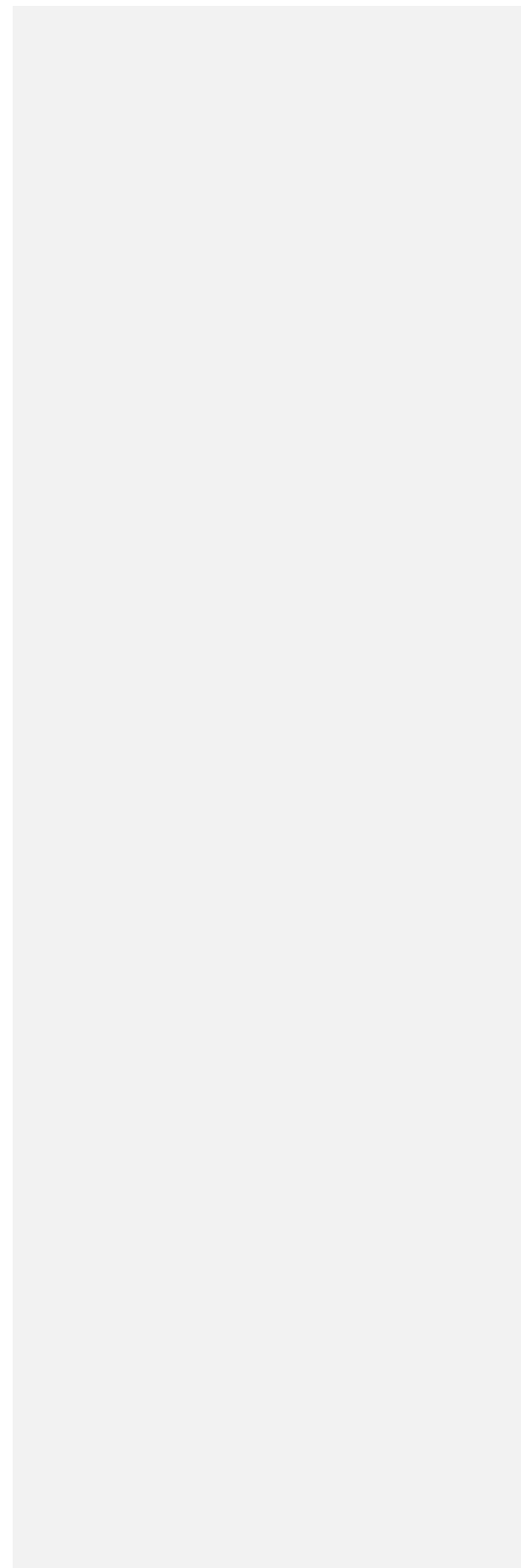
Employer Portal User Manual

Contents

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Employer Portal Browser, Sign in and Sign out

The **Employer** portal supports the latest versions of the following browsers:

- Microsoft Internet Explorer (Recommended)
- Microsoft Internet Explorer Edge
- Mozilla Firefox
- Google Chrome (Recommended)
- Safari

Sign In

1. Open your web browser and enter the URL of the **Employer** portal.

2. Type your username and password in the provided text boxes.

   You may select the **Remember me** checkbox if you want to automatically be signed in to the portal whenever you go to the URL.

3. Click the **Sign In** button.

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Sign out

Click the **Sign Out** link located on the top right of the page.
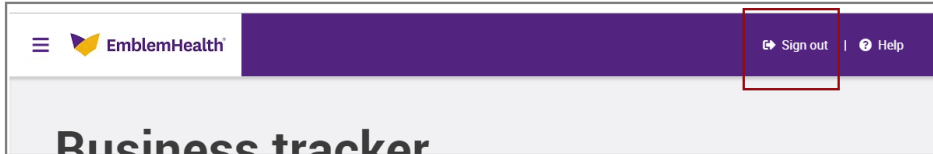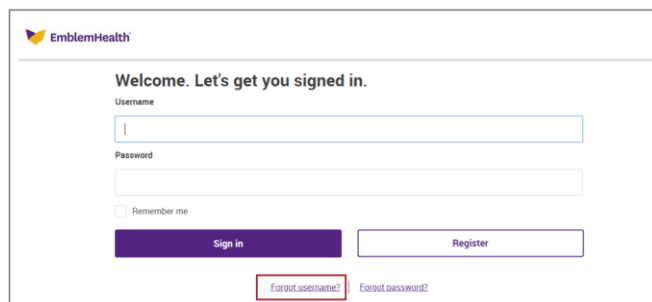
The connection to the **Employer** portal closes and the **Sign In** page will display on the screen.

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Recover Sign in Credentials

Retrieve Username

1. In the **Employer** portal's **Sign in** page, click the **Forgot username?** link on the bottom portion page.

2. In the **Retrieve your u**s**ername** page, complete the following required information: **First name, Last name** and **Date of birth**.

   In the **Select option to send username** drop down, select how you would like to receive reset information. Your options are: **EMAIL** or **SMS**.
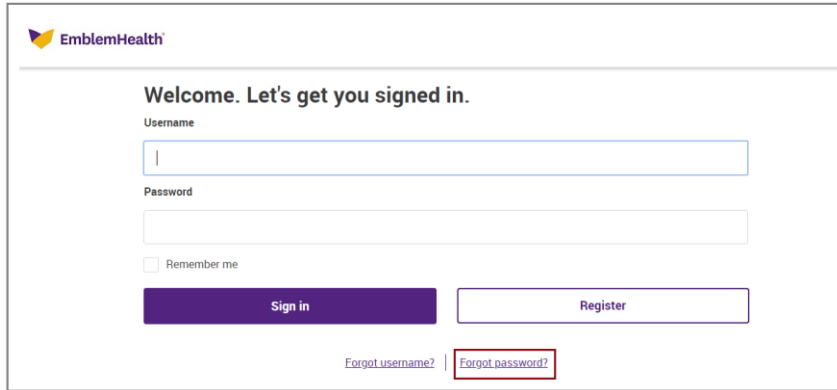
3. Click the **Send username** button. The username is sent as an email message or a text message, depending on the option you selected in the **Select option to send username** field.

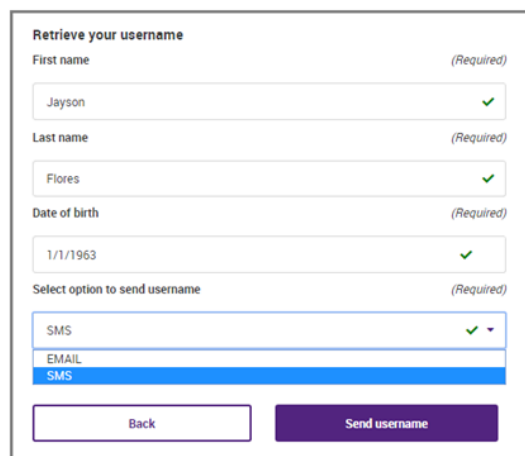# Employer Portal User Manual

Retrieve Password

1. In the **Employer** portal's **Sign in** page, click the **Forgot password?** link on the bottom portion page.
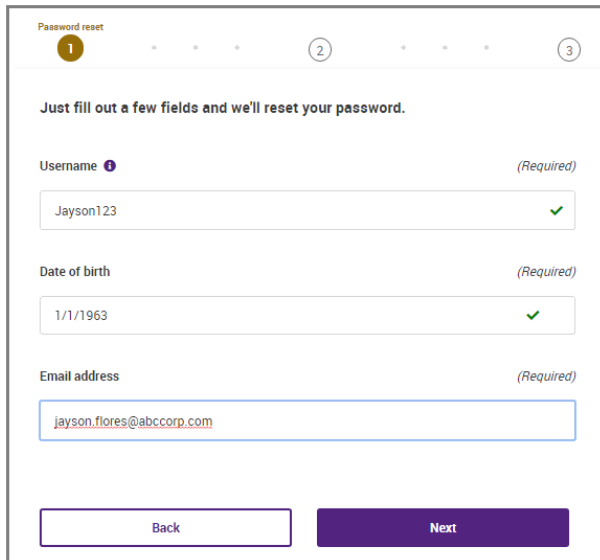
2. In the **Password reset** page, complete the following required information: **Username, Date of birth** and **Email address** then click the **Next** button.

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3. In the **Security questions** page, type the answers to the security questions displayed on the screen.

    The security questions and answers were defined when you were registered as a user of the **Employer** portal. The security questions and answers are found in the **Account Settings** option of the **Main menu.**

    Click the **Next** button.

4. In the **Reset password** page, type your new password in the **Create password** and **Confirm** password text boxes then click the **Done** button.

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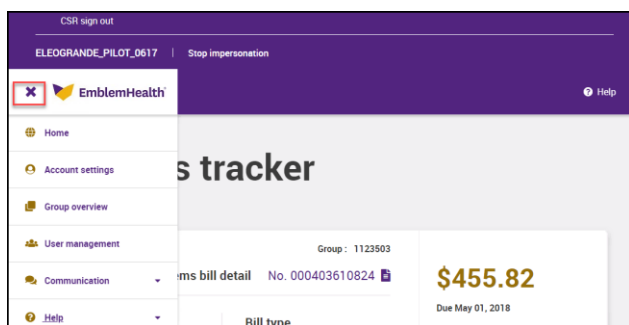
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Main Menu Access

The **Main Menu** contains **Navigation** options that provide access to information while in the **Employer** portal.

Click the ☰ icon located on the top left of the page to display the **Navigation** icons or options found in the **Main menu**.

Click the (**X**) icon to hide the **Navigation** icons.

Described are the **Navigation** icons in the **Main menu**:

- **Home** – provides access to the **Business Tracker** page.

- **Account settings** – provides the ability to view and manage the user's personal details and preferences.

- **Group overview** – provides various information specific to the employer group.

- **User management** – provides the ability for administrators to create and manage user accounts and their roles.

- **Communication** – provides a link to the following:

    o **Document center** – displays the **Document library** page that provides links to all documents available to the employer group

    o **Additional links**- displays the **Resource center** page that provides various links and resources available to the employer group

- **Help** – provides a link to the following:

    o **Online help**

    o **FAQs**

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Employer Portal Search

The **Employer** portal has several search functionalities and is available from several pages within the portal.

Member Search - Business Tracker or Dashboard Page

1. Sign in to the **Employer** portal.

2. In the **Manage employees** section, click the **Search members** dropdown and select **Member ID** or **Subscriber ID** as your search criteria.

   Type the member ID or subscriber ID information in the text box then click the **Search** button.

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Subscriber Search – Employee Management Page

1. Sign in to the **Employer** portal.

2. In the **Manage employees** section, click the **Manage Employees** button.

3. In the **Employee Management** page, click the **Search** link located on the upper right side of the page.

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4. Click the drop down and select **Subscriber name** or **Subscriber ID** as your search criteria.

   Type the name of the subscriber or the subscriber ID information in the **Search** text box then click the **Search** button.

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Member Search – Member Search Page

1. Sign in to the **Employer** portal.

2. Click the ≡ icon (**Main menu**) located on the left of the page then select the **Group overview** option.

3. Click the **Member search** tab.
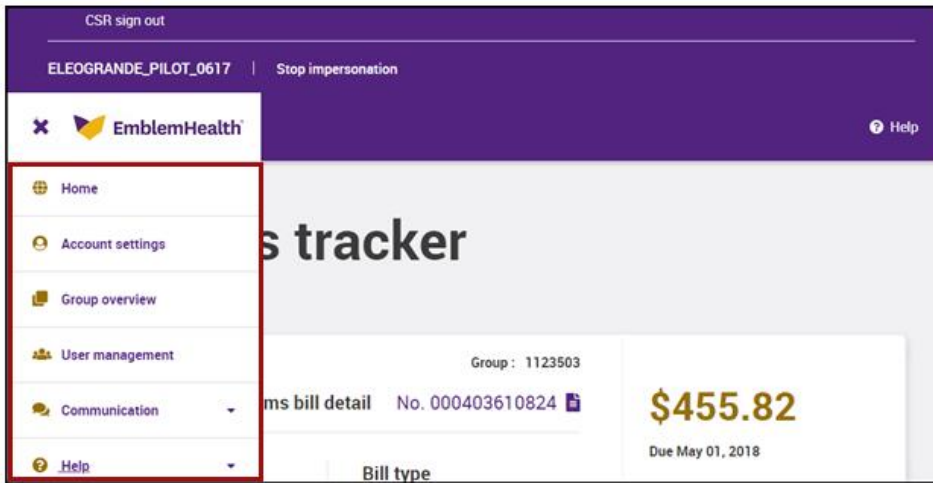

1. Click the drop down and select **Member ID**, **Subscriber ID** or **Member name & date of birth** as your search criteria.

   Type the member ID, subscriber ID or member name & date of birth in the **Search** text box then click the **Search** button.

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Main Menu Options

The **Main menu** link is available in all pages within the **Employer** portal.

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Home

The **Home** option listed in the **Main menu** displays the **Business tracker** page.

The **Business tracker** page has several sections:

- **Employer Billing and Payment section** – provides the ability to manage and maintain invoices and payments

- **Manage Employees Section -** provides the ability to manage and maintain employee records

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- **Your Plans Section** - provides the ability to view plans that are offered by the employer group

- **Document Center Section** - provides the ability to download or print documents listed in this section.

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Account Settings

Select the **Account settings** option from **Main menu** to display the **My Profile** page.

The **My Profile** page allows you to view or change your user profile information such as: name, date of birth, email address, security questions and password.

My Profile
Manage personal details and preferences

Account information

Thomas Smith

My profile

My details		✏Edit

Full name	Group number	Phone number
Thomas Smith	1104982	(212) 555-1212

Date of birth
11/24/1970

Update email address	✏Edit

Email address
tsmith@abccorp.com

Change my security questions	✏Edit

Change my password	✏Edit

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Group Overview

Select the **Group overview** option from **Main menu** to display the **Group overview** page.
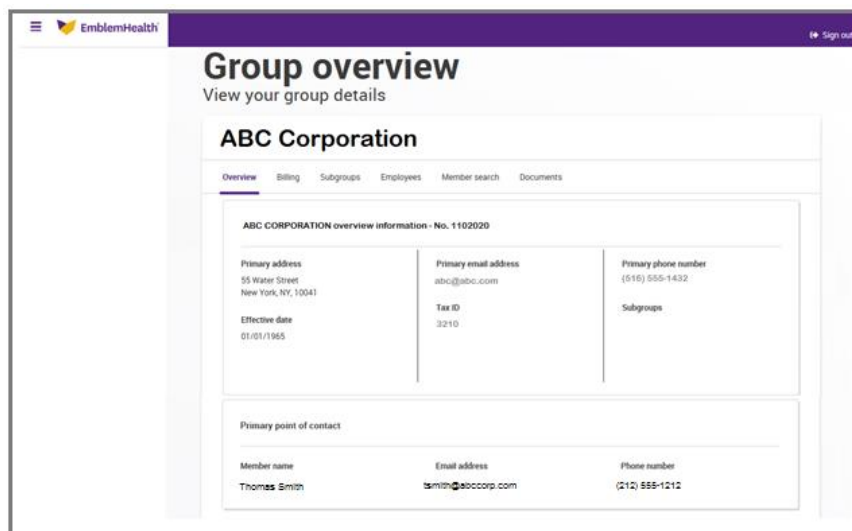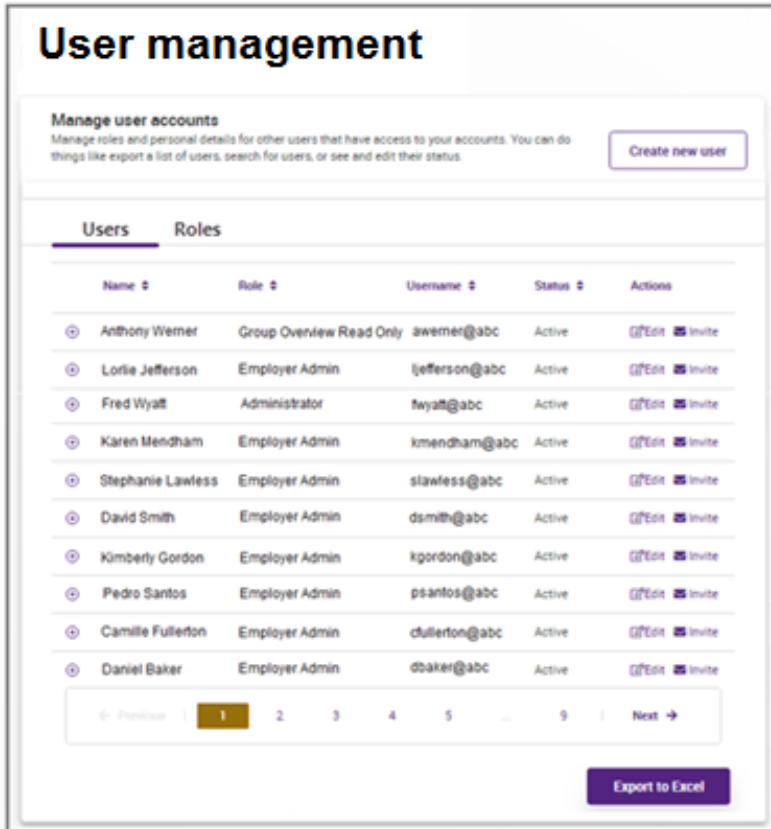

There are several tabs available in the **Group Overview** page:

- **Overview** – displays the **Group Overview** page that lists general information relating to the group including the group number, mailing address, email address, phone number, effective date, tax ID, subgroups and primary contact information

- **Billing** – displays the **Billing details** page that is used to view and maintain current and historical billing and payment information

- **Subgroups** – displays a list of subgroups associated with the group. You are able to search the **Subgroups** list if necessary.

- **Employees** – displays the **Employee management** page. Users are able to search the **List of employees** or navigate through pages as needed. The page also provides users the ability to export the displayed list to a pdf or a spreadsheet file.

- **Member Search** – displays the **Member search** page providing the ability to search for a specific member's record

- **Documents** – displays the **Group documents** page providing the ability to download or print documents that are available to the group

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User Management

Select the **User management** option from **Main menu** to display the **User management** page.

The **User management** page allows users with appropriate access permission to create a new user in the **Employer** portal.

There are two tabs available in the **Group Overview** page:

- **Users** – default tab displayed that provides the ability to view or edit user account information.
- **Roles** – provides the ability to define various user access based on roles

Communication

The **Communication** option from the **Main menu** provides two other selections:

- **Document center** – displays the **Document library** page that provides a list of important healthcare documents you can download or print.

  The **Search and Filter** link is used to search for a specific document or apply a filter to the list of documents displayed.
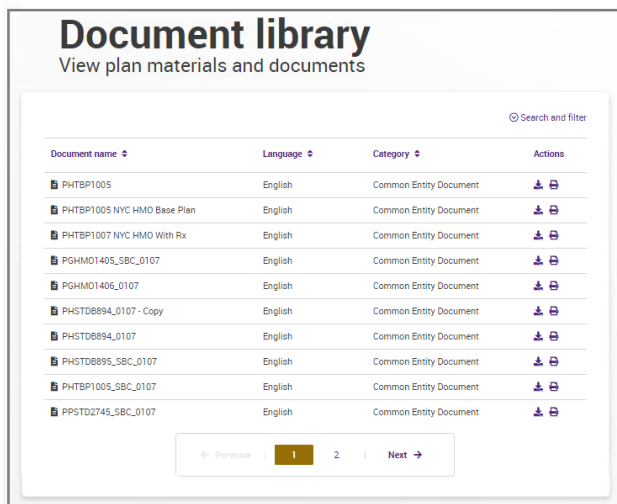
- **Additional links** – displays the **Additional links and resources** page that provides a list of helpful healthcare related internal and external links.

  The provided links and resources can be used to manage an employer account.
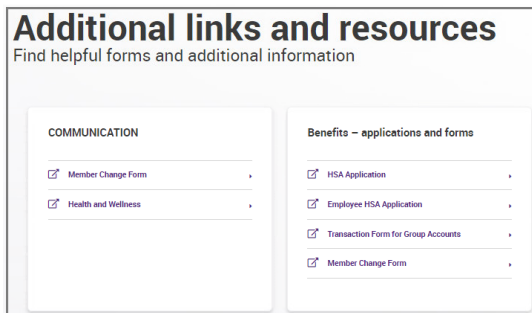
Help

The **Help** option from the **Main menu** provides two other selections:

- **Online help** – provides reference information on usage and functionalities available in the **Employer** portal.
- **FAQs** – displays the **Frequently asked questions** page that provides you answers to frequently asked questions.
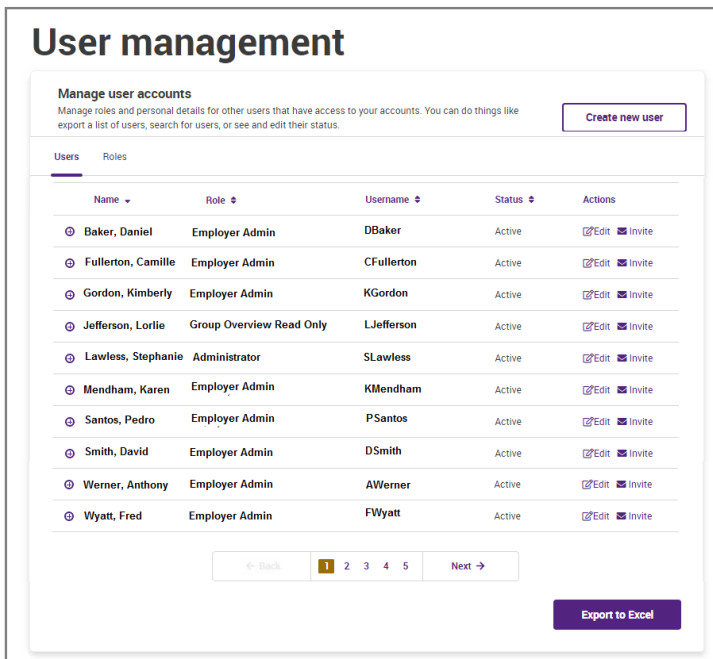
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Manage Users

View User List

Select the **User management** option from **Main menu** to display the **User management** page.

Click on the up arrow or down arrow icon to the right of the column header label to sort the list in ascending or descending order based on the column.

Click the ✎ Edit icon to edit the corresponding user account.

Click the ✉ Invite icon to send/resend an invitation email to the newly created user to register in the **Employer** portal.

Click the plus sign (+) to the left of the user's name to expand the user row and display the Access list of subgroup(s) associated with the user.

Click the **Export to Excel** button to export the list to an Excel file.

Create New User

Only users with appropriate access permission are able to create new **Employer** portal users.

1. Sign in to the **Employer** portal.

2. Click the ☰ icon (**Main menu**) located on the left of the page then select the **User management** option.

3. Click the **Create new user** button located on the upper right portion of the page.
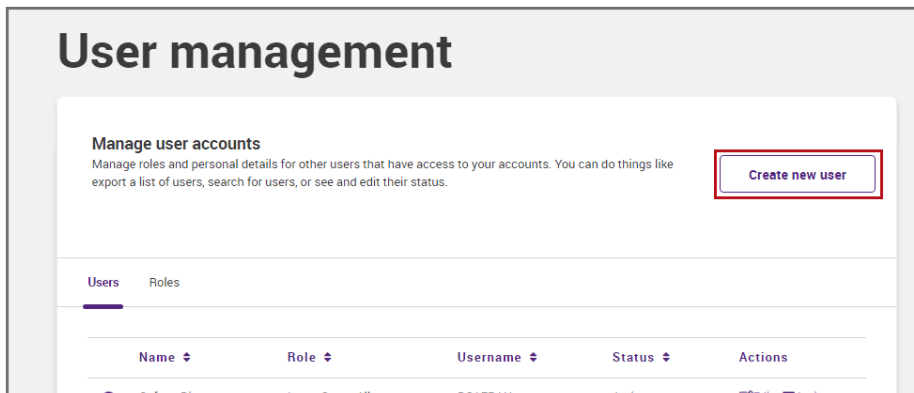
4. Complete the required information in the **Create new user account** window such as first name, last name, user role, email or mobile number.

   The username information can be left blank as the user can provide this information when he/she registers in the portal as a new user.

   The **Active** status is selected by default.

   Select the **Entity access** checkbox of the subgroup(s) the new user should have access to.

5. Click the **Create user** button to finish creating the new user account.

   The new user account created is added to the list displayed in the Users tab.

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Create new user account

Enter the information and click on the Create user button to add a new user.

First name *(Required)*

> Enter first name

Last name *(Required)*

> Enter last name

Entity type

> Employer

User entity

> ABC Corporation

User name

User role *(Required)*

> Select User Role ▾

Email

> Email is required if the phone is not provided

Mobile number

> Phone is required if the email is not provided

Date of birth

> MM/DD/YYYY 🗓

Status

⦿ Active ◯ Inactive

Entity permissions

Subgroup ID	Subgroup	Entity access
ALL		☐
1001	**ABC Corporation**	☐

Cancel   Create user

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Edit User Information

Only users with appropriate access permission are able to make changes to an **Employer** portal user's account.
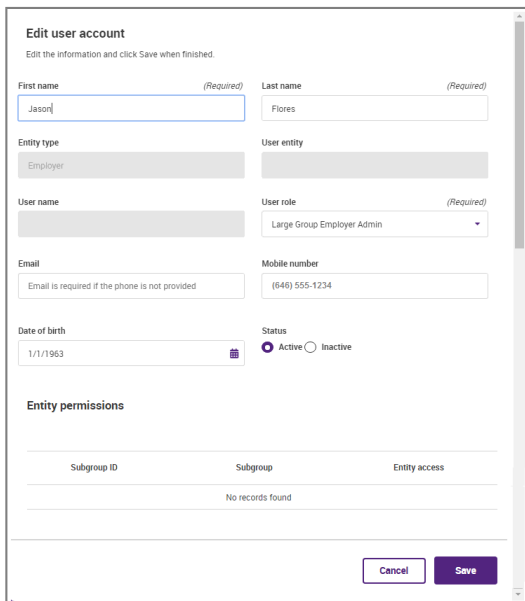
*Note: The steps below also apply to changing a user's account status to **Inactive**.*

1. Sign in to the **Employer** portal.

2. Click the ☰ icon (**Main menu**) located on the left of the page then select the **User management** option.

3. Locate the user information to edit.

   Click on the up or down arrow icon to the right of a column header to sort the list based on the column header. You may also click the pagination links located on the bottom of the list to navigate to different pages.

4. Click the corresponding ☑Edit icon found in the **Actions** column for the desired user. The **Edit user account** window will display.

5. Complete the change(s) as needed then click the **Save** button to save the changes made.

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User Registration

1. Navigate to the **Employer** portal and click the **Register** button.

   If you received an email with the **Employer** portal registration link specified, click the link to get to the **Let's start your registration** page and skip to **Step 1 – User** Information. click the registration link specified in the email notification you received.

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2. In the **Let's start your registration** page, complete the following required information: **Group ID** or **Invoice number**, **Zip code** of primary business address, new user's **First** and **Last name** and **Mobile number** or **Email address**. The **Date of birth** information is optional.

Click the **Next** button to proceed to the next page: **Verification** page.
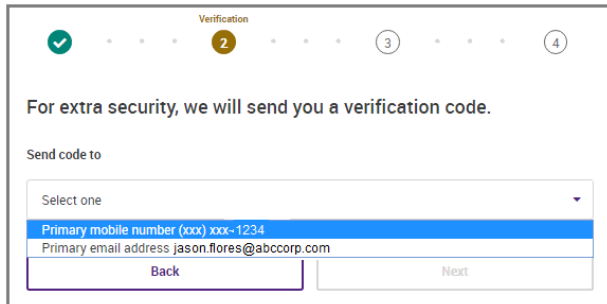
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3. In the **Verification** page, click the **Send code to** drop down field and select the applicable option then click the **Next** button.
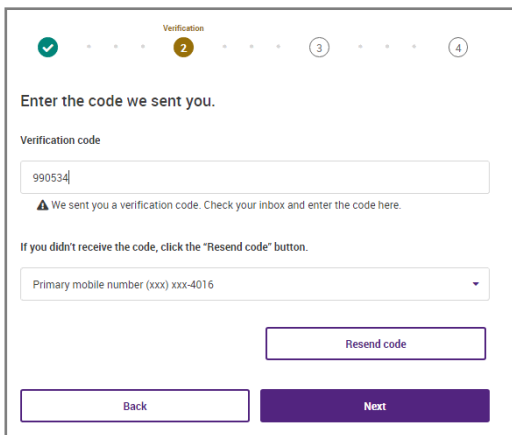
   A verification code will be sent by the **Employer** portal to the option you selected in the **Send code to** drop down field of the **Verification** page.

4. In the **Verification code** text box, type the verification code received via text message or email.

   Click the **Resend code** button if you did not receive the verification code. The **Employer** portal will send a new verification code to the selected option in the drop down field.

   If the time has expired to enter the verification code, click the Resend code command button to resend the verification code to the previously selected method.

   Click the **Next** button to proceed to **Security questions** page.

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5. In the **Security questions** page, select three unique security questions from the list and type an answer for each question. Answers to the selected questions cannot be blank.

Click the **Next** button to proceed to the **Create password** page.

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6. In the **Create password** page, complete the following required information: type and confirm your username and type and confirm your password.

   The password you create can be up to 32 characters long. It must have at least one of each of the following: uppercase letter, lowercase letter, number and special character (i.e. ~, !, @, #, $, %, etc.)

   Click the **Next** button.

   If all fields are properly completed, the **Congratulations** page will display to confirm that you have successfully registered in the **Employer** portal.

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Manage Bills and Payments

The **Billing** tab found in the **Group Overview** page provides the employer group the ability to manage and maintain invoices and payments.

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There are four subtabs found in the **Billing** tab:

- **Billing** – default subtab
- **Payments** – displays current and historical one-time payment information
- **Payment methods** – provides the ability to view, add, edit or delete payment methods for the employer group
- **Recurring payments** - provides the ability to view, add, edit or delete recurring payments**.**

  Only one recurring payment method can be active at one time.

Manage Bills

Current and historical invoices are displayed in the **Billing** subtab of the **Billing details** page.

To display the **Billing details** page, click the **Main menu** and select the **Group overview** option. Then click the **Billing** tab and the **Billing** subtab.

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The bottom section of the **Billing details** page lists invoices for the last eighteen months in grid format.
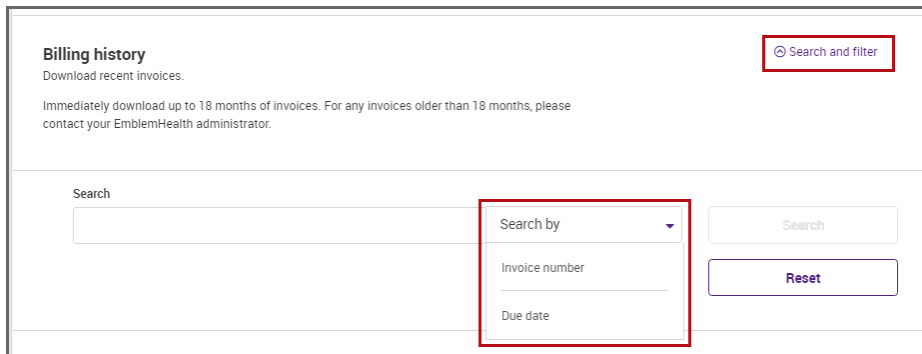
Click the **Export to Excel** button to download the historical invoice information that are listed on the grid.

Click the **Set up auto pay** button to display the **Recurring payment** subtab page.

Click the **Pay bill now** button to display the **Payments** subtab page.

The historical invoice list can be sorted in ascending or descending order. Click the ⇕ icon to the right of the column name to sort the items listed on the grid into ascending or descending order based on the column name.

The **Search and filter** link located to the right of the **Billing history** section allows you to search and filter for specific historical invoices based on **Invoice number** or **Due date** as search criteria. Type the search information in the **Search** textbox then click the **Search** button.

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Manage Payments

Click the **Payments** subtab of the **Billing details** page to manage and maintain invoice payments.

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The top portion of the **Payments** subtab shows pending one-time payment information that has been setup by a user. The **Payment method** specified will be used to pay for the stated **Amount** on the **Scheduled pay date**. Changes or cancellation to the payment can be made prior to the scheduled pay date.
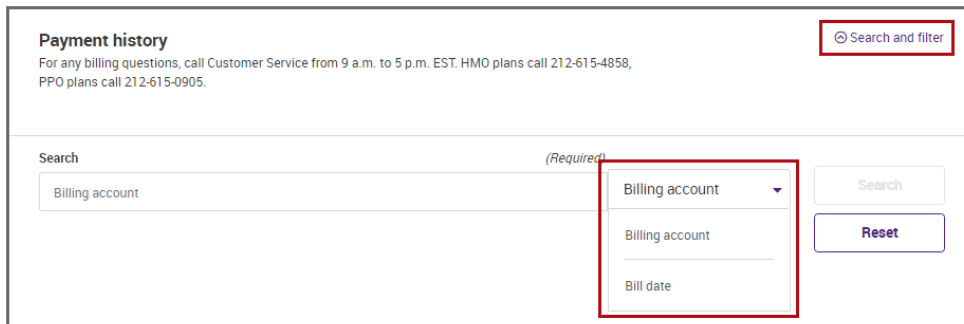
The bottom portion of the **Payments** subtab shows historical payment information in a grid. Click the ⬍ icon to the right of the column name to sort the items listed on the grid into ascending or descending order based on the column name. Use the pagination icons located below the **Payment history** grid to navigate to other pages as needed.

The **Search and filter** link, located to the right of **Payment history** allows the user to search for specific payment information based on **Billing account** or **Bill date** search criteria. Type the search information in the **Search** textbox then click the **Search** button.

Information in the **View pending one-time payments here** and **Payment history** grids can be exported to Excel by clicking on their corresponding **Export to Excel** command button.

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Manage Payment Methods

Click the **Payment methods** subtab of the **Billing details** page to manage and maintain payment methods.

To add new method of payment information, click the **Add payment method**. Complete the following required information: **Bank Routing number**, **Bank Account number** or **Credit card number** . Select **Checking** or **Savings** for **Bank Account type**.

Click the 🛈 icon to the right of the **Bank Routing Number** field to display help information in completing the fields. Click the icon again to hide the help information.

To delete a payment method information listed, click the delete icon 🗑 found in the **Actions** column located to the right of the payment method to be deleted.

Manage Recurring Payments

Recurring payments for invoices can be scheduled for a particular date of each month, Changes to the recurring payments can be made as well.

To add new recurring payment information, click the **New recurring payment** button. Complete the following required information: **Select billing account, Payment method, Frequency** and **Type.** You will also need to specify an **Amount** (if **Custom amount**) is selected in the **Type** drop down list), **Start date** and **End date.** If there is no applicable end date, you may leave the **End date** information blank.

Click the **Next** button.

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Complete the information in the fields as applicable:

…………..

Click the **Submit recurring payment** command button. A confirmation for the
successful creation of the recurring payment will display on the screen.

To edit a recurring payment information listed on the page, click the edit icon found
in the **Actions** column located to the right of the recurring payment line item to be
changed. Do the necessary changes to the recurring payment information then click the
Save button.

To delete a recurring payment information listed, click the delete icon found in the
Actions column located to the right of the recurring payment line item to be deleted.

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Employee Detail

The **Employee detail** page lists subscriber-specific details including benefit plan and dependent information.

To access the **Employee detail** page, perform a search of the subscriber record or select the subscriber record from the **List of employees** that can be generated from the **Group overview** page

There are four sections found in the **Employee detail** page:

- **Employee Information** – provides the employee's demographic and contact information.

  Subscriber ID is a 9 alpha-numeric ID, starting with the letter "K". For example, K12345678

  Member ID is 11 alpha-numeric ID, also beginning with the letter "K" and ending with the last two digits, which specify whether it is a member or dependent. The member will be "01" and the first dependent will be "02." For example, K1234567801, K1234567802

- **Plan Selected** – identifies the plan(s) the employee is associated with including PCP information if available

  Coordination of Benefits information is only visible if the subscriber has COB. The other health plan's name, coverage dates and coverage type are listed if the information is available in Facets core system.

- **ID Card** – displays the graphic image of the employee's health plan ID card

- **Dependent Information** – provides information regarding the dependent(s) or member(s) associated with the employee. The plan(s) associated with the member(s) and a graphic image of the member ID cards is shown as subsection information.

  Each dependent is assigned a unique suffix number of 2 and above.

Commented [VT4]: Verify if info is accurate. SIT shows 10 alphanumeric using only 1 digit at the end for suffix
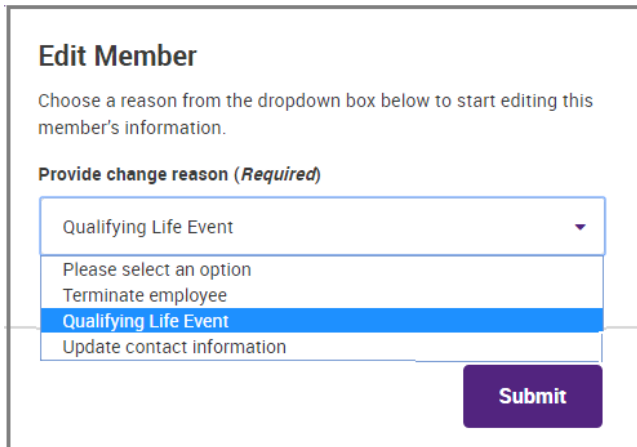
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Add a Qualified Life Event (QLE)

Qualifying Life Event (QLE) information can be added from the **Employee detail** page by clicking on the **Edit member** button located on upper right side of the page.

In the **Edit Member** window, click the **Provide change reason** drop down and select the **Qualifying Life Event** option listed. Then click the **Submit** button.

Edit Member

Choose a reason from the dropdown box below to start editing this member's information.

Provide change reason (*Required*)

Qualifying Life Event ▼
Please select an option
Terminate employee
Qualifying Life Event
Update contact information

Submit

In the **Choose an eligible Qualifying Life Event from the list below** window, click the **Provide reason** drop down and select one of the options listed. Then click the **Submit** button.

Choose an eligible Qualifying Life Event from the list below.

**Provide reason** (*Required*)

Had a baby ▼
Provide reason
Had a baby
Adopted a child, placed a child for foster care
Got married
Got divorced or legally separated
Changes in residence
Loss of health insurance
Special circumstances

Submit

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A progress bar is displayed on the left pane of the screen showing the various steps and the progress of completion while adding a member's QLE.
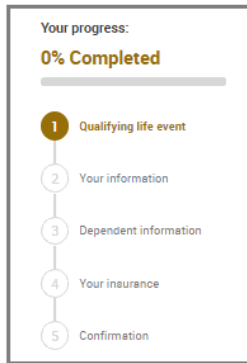
In the **Tell us about the Qualifying Life Event** page, add the required **Event date** information. Click the **Browse** button to add the required supporting document to the QLE. If multiple documents are to be added, click the **Add another document** button for every supporting document to be added.

Click the **Next button.**

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In the **Review employee details page**, review the information in each of the fields and ensure that all required information is completed. Then click the **Next** button.

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Click the **Add dependent** button to add more dependents or click the **Next** button

Verify the accuracy of the **Plan name** and the information in the **Select members to be covered** section then click the **Next** button.

Verify the accuracy of the details specified in the **Member information**, **Dependent information** and **Selected Plans** section then click the **Submit** button.

A message will display on the screen once all the QLE information is successfully submitted.

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Terminate an Employee

To terminate an employee, go to the **Employee detail** page and click on the **Edit member** button located on upper right side of the page.

In the **Edit Member** window, click the **Provide change reason** drop down and select the **Terminate employee** option listed. Then click the **Submit** button.
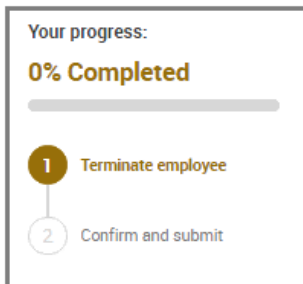
A progress bar is displayed on the left pane of the screen showing the various steps and the progress of completion while terminating an employee.

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The **Terminate employee** page will display on the screen. Complete the required **Termination date** and **Termination reason** information then click the **Next** button.

Terminate employee
End employee's coverage

Edit member

ABC Corporation

Member information

Terminating this member will remove them from the active employee roster and end their health insurance coverage as of the selected date.

Terminate employee

First name

Lydia

Last name

Richards

Termination date (*Required*)

8/29/2019

Termination reason (*Required*)

Voluntary termination of employment

[Cancel]　[Next]

Do you need help?

Have questions? For assistance call us at:

Phone
646-447-5000

Email
AskEmblem@EmblemHealth.com

Address
Corporate Headquarters
55 Water St
New York, NY 10041

When will I see these changes in the portal?
Depending on the plan(s) selected, the changes may take 24-48 hours to appear.

This group allows retroactive changes for up to 90 days. Changes can also be made up to 90 days in the future.

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The **Member Information** page will display. Verify that the member information shown belongs to the employee being terminated then click the **Submit** button found towards the bottom of the page.

The **Termination complete** page will display confirming the success of the termination task. The task bar on the left pane will also show 100% completion.

Employer Portal User Manual

Help Desk Contact

If you have any questions for which the answers are not found in this manual, please contact:

Samantha Hayes

Email: SHayes@emblemhealth.com
Phone: 646 – 447 – 0038

Commented [VT5]: verify that info is accurate

Employer Portal User Manual

Appendix

Registration Sample Email

Hello, Emily.

Thank you for choosing EmblemHealth.

You've created your new myEmblemHealth account.

You have one more step, and then you'll be all set.

To complete your registration, click https://employer.emblemhealth.com/tzf/employer/employer-registration/#/registration?groupProfileId=EE20181228125005

If you have questions, call us at **888-447-7703 (TTY: 711)**. Our hours are 8 a.m. to 6 p.m., Monday to Friday. A Customer Service representative will be happy to help.

We're committed to supporting you.

Sincerely,
Jennifer Truscott
Vice President, Operations

Verification Code Sample Email

Hello, Emily.

Thank you for choosing EmblemHealth.

Your verification code is **671197**. It is valid for 10 minutes so be sure to use it now. If you need a new code, please click on the Resend code button in your portal.

If you have questions or did not request a verification code, call us at **888-447-7703 (TTY: 711)**. Our hours are 8 a.m. to 6 p.m., Monday to Friday. A Customer Service representative will be happy to help.

We're committed to supporting you.

Sincerely,
Jennifer Truscott
Vice President, Operations

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Registration Completion Sample Email

Hello, Emily.

Thank you for choosing EmblemHealth.

Your registration is complete and your username is ChandraCNY07.

If you have questions, call us at **888-447-7703 (TTY: 711)**. Our hours are 8 a.m. to 6 p.m., Monday to Friday. A Customer Service representative will be happy to help.

We're committed to supporting you.

Sincerely,
Jennifer Truscott
Vice President, Operations

Change to Account Profile Sample Email

Hello, Emily.

You recently made a change to your myEmblemHealth profile.

If you have questions, or you did not make this change, call us at **888-447-7703 (TTY: 711)**. Our hours are 8 a.m. to 6 p.m., Monday to Friday. A Customer Service representative will be happy to help.

We're committed to supporting you.

Sincerely,
Jennifer Truscott
Vice President, Operations