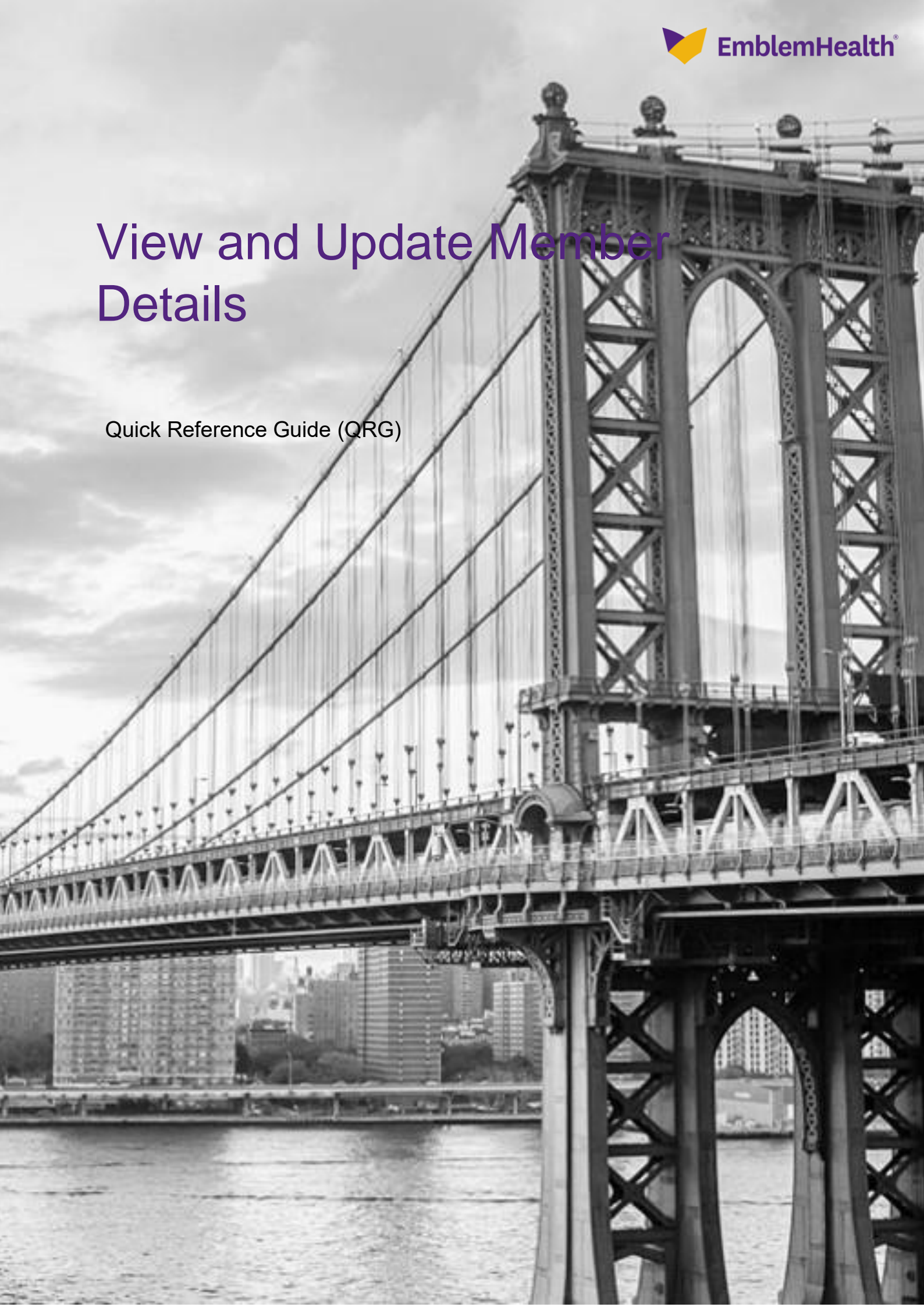


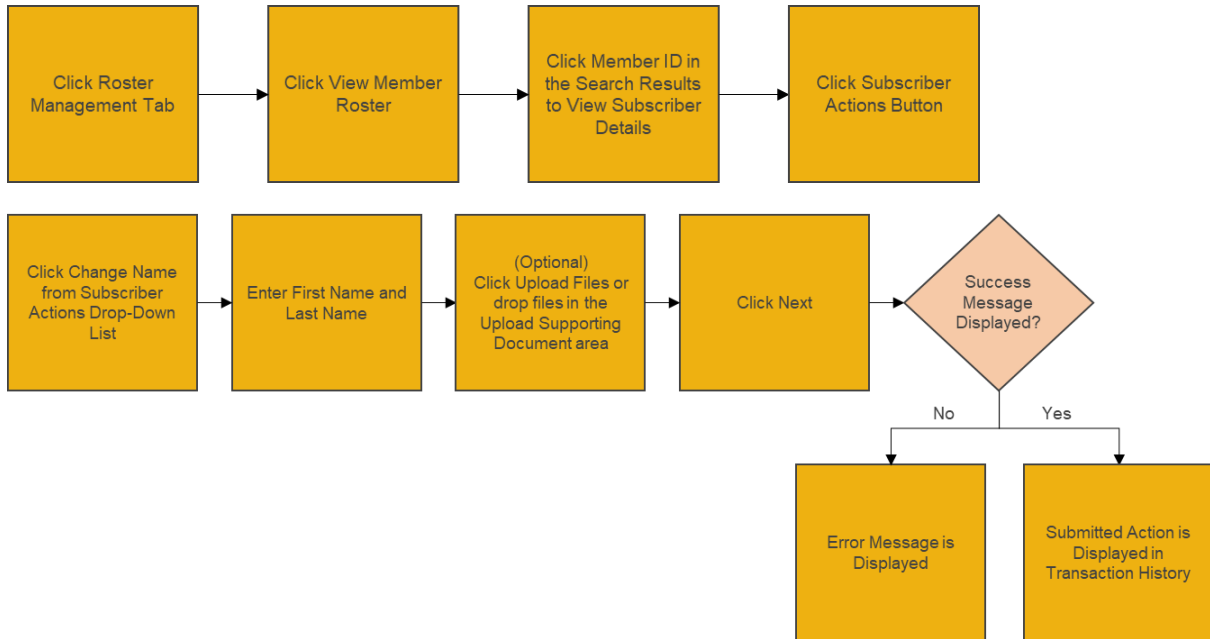
View and Update Member Details

Quick Reference Guide (QRG)



Employer Portal –View and Update Subscriber Details

This Quick Reference Guide (QRG) will provide an overview of the process to View and Update Subscriber Details. Specifically, this QRG covers Change Name and Change Subscriber Address.



Let us look at the steps in detail to View and Update Subscriber Details.

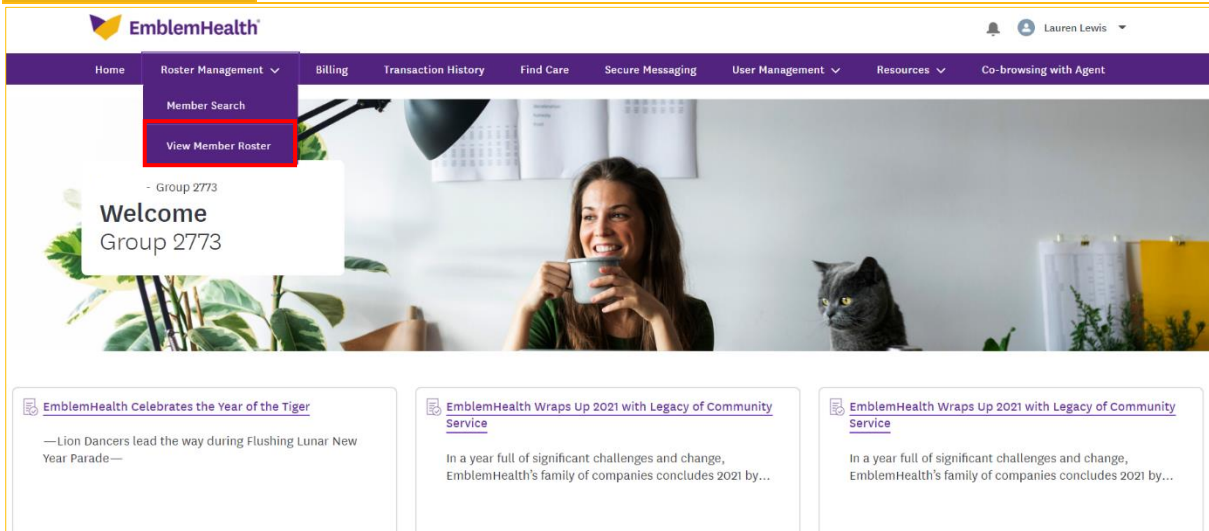
Purpose: View and Update Subscriber details.



Step 1:

This is the process for **Change Name**.

1. From the EmblemHealth **Home** page, select the **Roster Management** tab.
2. From the drop-down menu, select **View Member Roster**.





Step 2:

The Member Roster screen displays.

1. In the **Search By** field, select desired option (**None**, **Subgroup ID**, or **Subgroup Name**).
2. If **Subgroup Name** or **Subgroup ID** are selected, then enter Subgroup Name or Subgroup ID in the **Search** field.

Home > Member Roster

- GROUP 2773

Member Roster

Search By: None Subgroup ID Subgroup Name

Member Status: All

Subscriber Only Future Effective

[Search](#) [Reset Search](#)

Exporting search results will show more details for each member. [Export Member Roster](#)

Subgroup ID	Class ID	Member ID	Member Name	Date of Birth	SSN	Gender	Relationship to Subscriber	Coverage Start Date	Termination Date	Original Effective Date	Status
1001	1001	K8049400001	ALEX, LAWREN HAROLD	01/31/1954	XXX-XX-7785	Male	Subscriber	01/01/2020	-	01/01/2019	Active



Step 3:

1. Click **Search**.

Note: Check the **Subscriber Only** checkbox to search for Subscribers only (excluding Dependents). Check the **Future Effective** checkbox to search only for members whose coverage is Future Effective. The **Member Status** drop-down menu defaults to **All**. You can also select **Active** or **Inactive**.

Home > Member Roster

- GROUP 2773

Member Roster

Search By: None Subgroup ID Subgroup Name

Member Status: All

Subscriber Only Future Effective

[Search](#) [Reset Search](#)

Exporting search results will show more details for each member. [Export Member Roster](#)

Subgroup ID	Class ID	Member ID	Member Name	Date of Birth	SSN	Gender	Relationship to Subscriber	Coverage Start Date	Termination Date	Original Effective Date	Status
1001	1001	K8049400001	ALEX, LAWREN HAROLD	01/31/1954	XXX-XX-7785	Male	Subscriber	01/01/2020	-	01/01/2019	Active

Employer Portal –View and Update Subscriber Details



Step 4:

The results display.

1. Click **Member ID** to view member details.

Note: Records can be sorted by desired field; by default, they are sorted by **Member Name**.

Subgroup ID	Class ID	Member ID	Member Name ↓	Date of Birth	SSN	Gender	Relationship to Subscriber	Coverage Start Date	Termination Date	Original Effective Date	Status
1001	1001	K8007728202	SIDNEY MARSH M	02/18/1975	XXX-XX-2044	Female	Wife	03/01/2020	-	09/22/1989	Active
1001	1001	K8002036801	ROGER ALFONSO E	03/28/1957	XXX-XX-0929	Female	Subscriber	03/01/2020	-	05/01/2002	Active
1001	1001	K8007728201	PATSY MARSH U	03/14/1967	XXX-XX-8677	Male	Subscriber	03/01/2020	-	09/22/1989	Active
1001	1001	K8001871001	MISTY CANDACE N	01/27/1974	XXX-XX-5065	Male	Subscriber	03/01/2020	-	01/01/2018	Active
1001	1001	K8006674501	MARSHALL EVELYN	08/21/1978	XXX-XX-	Female	Subscriber	03/01/2020	-	03/01/2013	Active



Step 5:

The Subscriber Details screen displays.

1. Click **Subscriber Actions**.

Note: For a dependent, these steps are the same. The Subscriber Actions drop-down menu will be called Dependent Actions. Available actions may vary according to the group type and/or the plan type (e.g., Medicare).

2. Click **Change Name** from the drop-down menu to change Subscriber name.

Subscriber Details

Status
Active

Address
659 Oxnard St, BROOKLYN, NY, 11236

Marital Status
Unreported

Termination Date
-

Email
-

SSN
XXX-XX-4167

Member Name
RANDY A'LENE

Mobile Phone Number
-

Gender
Female

Member ID
K550053870

DOB
06/28/1980

Referral Re
No

▼ Subscriber Actions

Add Dependent

Change Name

Change Marital Status

Change Subscriber Address

Change Date of Birth

Change Plan

Terminate Subscriber

Terminate Coverage

Change Language / Ethnicity / Race

▼ Member Information



Step 6:

The Change Name screen displays.

1. Enter **First name** and **Last Name**.

Note: Fields marked with an asterisk are mandatory.

2. Click **Upload Files** or drop files in the **Upload Supporting Document** area to upload the supporting document files.

Change Name

<

First Name* Middle Name Last Name*

You will need to upload a copy of at least one of the documents below as part of this transaction.

- Birth Certificate
- Driver's License/State ID
- Marriage Certificate
- U.S. Passport (identification page)

Upload Supporting Document

Or drop files



Step 7:

1. Click **Next**.

You will need to upload a copy of at least one of the documents below as part of this transaction.

- Birth Certificate
- Driver's License/State ID
- Marriage Certificate
- U.S. Passport (identification page)

Upload Supporting Document

Or drop files

You can upload files that are .doc, .docx, .xls, .xlsx, .ppt, .pptx, .zip, .zipx, .pdf, .gif, .jpg, .jpeg and .png. Files must be less than 3 MB in size.

*Required information



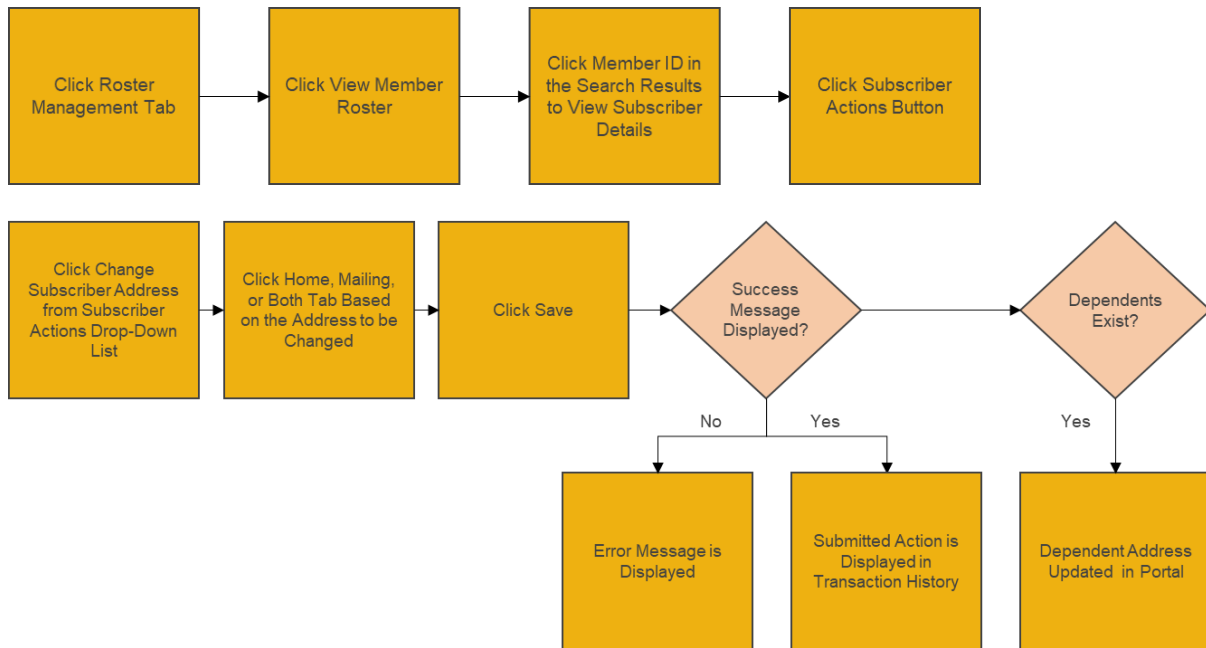
Step 8:

The Confirmation Screen displays.

1. Click **OK**.

The screenshot shows a web interface with a purple navigation bar at the top containing links for Home, Roster Management, Billing, Transaction History, Find Care, Secure Messaging, User Management, and Resources. The user's name, Lauren Lewis, is displayed in the top right corner. Below the navigation bar, the breadcrumb trail reads "Home > Change Name". The main content area features a "Confirmation" heading, followed by a message: "Thank you for your submission. Your case number is 07528773. You can check the status of your request in the [Transaction History](#). It may take up to three (3) business days for your request to be reflected online." At the bottom center, there is a yellow button labeled "OK" which is highlighted with a red rectangular border.

Employer Portal –View and Update Subscriber Details



Step 1:

This is the process for **Change Subscriber Address**.

1. Click **Subscriber Actions**.
2. Click **Change Subscriber Address** from the drop-down menu to change the address.

Subscriber Details

Status Active	Termination Date -	Member Name RANDY A'LENE	Member ID K550053870	<div style="border: 1px solid black; padding: 2px;"> ▾ Subscriber Actions </div> <ul style="list-style-type: none"> Add Dependent Change Name Change Marital Status <li style="border: 1px solid red;">Change Subscriber Address Change Date of Birth Change Plan Terminate Subscriber Terminate Coverage Change Language / Ethnicity / Race
Address 659 Oxnard St, BROOKLYN, NY, 11236	Email -	Mobile Phone Number -	DOB 06/28/1980	
Marital Status Unreported	SSN XXX-XX-4167	Gender Female	Referral Re No	

▾ Member Information



Step 2:

The Change Subscriber Address screen displays.

Home > Member Roster > Subscriber Details > Change Subscriber Address

Change Subscriber Address

Note: If the subscriber and dependent(s) share the same address, any updates submitted below will apply to both subscriber and dependent(s). If the subscriber and dependent(s) do not have the same address, updates submitted below will only apply to the subscriber.

Are you updating the subscriber's...?

Home	Mailing	Both
------	---------	------

*Required information

Save

Cancel



Step 3:

1. Click **Home** to update home address.
2. Enter the required information.
3. Click **Save**.

Are you updating the subscriber's...?

Home	Mailing	Both
------	---------	------

Home Address

Street Address

659 Oxnard St

855

Zip Code*

11236

City*

BROOKLYN

State*

NY

*Required information

Save



Step 4:

1. Click **Mailing** to update the mailing address.
2. Enter the required information.
3. Click **Save**.

Are you updating the subscriber's...?

Home **Mailing** Both

Mailing Address

Street Address

659 Oxnard St

855

Zip Code*

11236

City*

BROOKLYN

State*

NY

*Required information

Save



Step 5:

1. Click **Both** to update home and mailing address at once.
2. If your home and mailing addresses are the same, select the **Is Mailing Address same as Home Address?** box.
3. Enter the required information.

Are you updating the subscriber's...?

Home Mailing **Both**

Home Address

Street Address

659 Oxnard St

855

Zip Code*

11236

City*

BROOKLYN

State*

NY

Is Mailing Address same as Home Address ?



Step 6:

1. If home and mailing address are not the same, enter the required information for both.
2. Click **Save**.

Mailing Address

Street Address

659 Oxnard St

855

Zip Code*

11236

City*

BROOKLYN

State*

NY

*Required information

Save

Cancel



Step 7:

- The Confirmation screen displays.
1. Click **OK**.

Lauren Lewis

Home Roster Management Billing Transaction History Find Care Secure Messaging User Management Resources

Home > Change Name

Confirmation

Thank you for your submission. Your case number is 07528773. You can check the status of your request in the [Transaction History](#). It may take up to three (3) business days for your request to be reflected online.

OK

Thank
You

