

# Welcome to Benefits Manager

## Instruction Guide for Web Billing

Contents | [Next >](#)

This instruction guide demonstrates how to navigate through Benefits Manager. Please make sure you are successfully logged into Benefits Manager before beginning this guide. (Diagram 1).

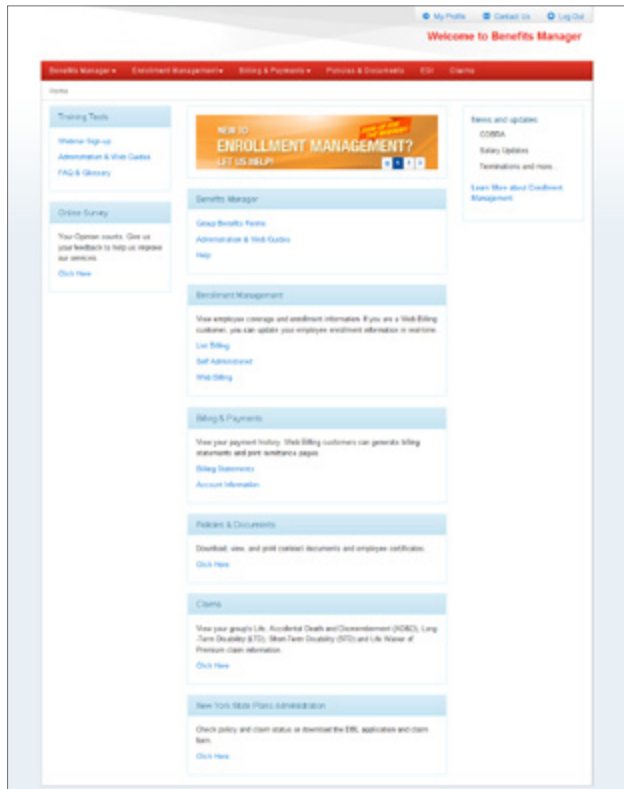


Diagram 1

## Contents:

### Section 1: Group and Insured Benefit Information

Search and view insured list .....	3
View and edit an insured record .....	4
View benefit information .....	4
Update insured salaried .....	5

### Section 2: Group Billing and Payment Information

Generating billing statements and reports .....	6
Viewing your group's billing and payment activity .....	6

### Section 3: Downloading Documents

View and download your group policies and documents .....	7
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### Section 4: Profile Management

Manage user information .....	11
-------------------------------	----

### Section 5: Help

Help .....	12
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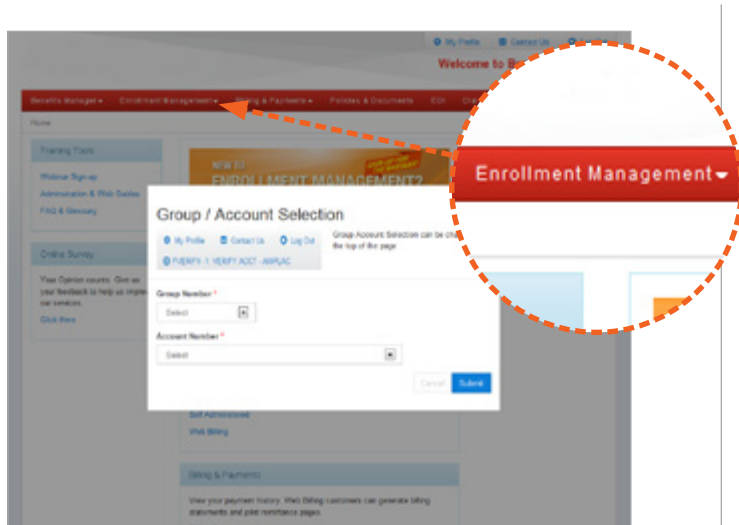


Diagram 2

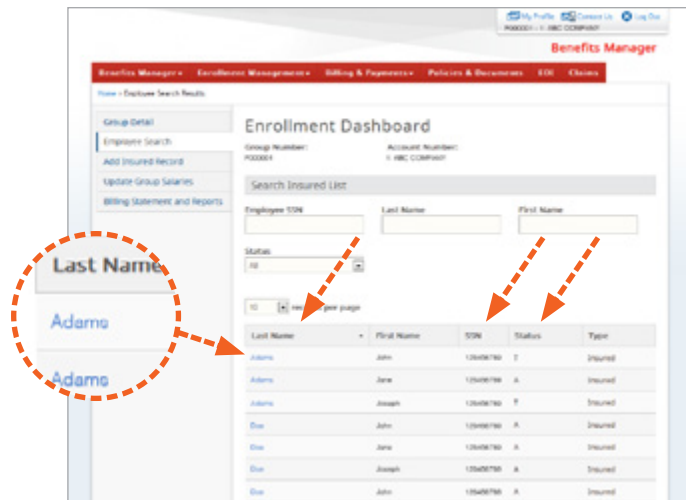


Diagram 3

## Section 1:

# Group and Insured Benefit Information

The insured list can be reviewed and search from the Enrollment Dashboard page:

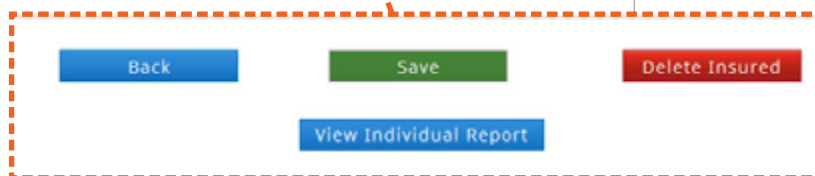
**Step 1:** Click on Enrollment Management and input the Group and Account information (Diagram 2).

**Step 2:** From the Enrollment Dashboard search for a particular employee by inputting their information or scrolling through the Insured List (Diagram 3).

**Step 3:** Click on the last name of the Insured or Dependent to view his/her benefit information (Diagram 3).

The Insured List can be sorted by Name, SSN, Status and Type (Diagram 3).

Diagram 4



## View and Edit an Insured Record:

The following information can be viewed and edited (Diagram 4):

### The Insured's:

- Name, Gender, Tobacco Use, Date of Birth, Social Security Number, Class, Department Division, Date of Hire, Occupation, Salary Type, Salary, Hours Worked per Week and Status.

### Coverage Information:

- Benefit and amounts of the insured.



**Tip:** You can also delete an Insured, add or edit a dependent (if eligible) and view individual reports (Diagram 4).

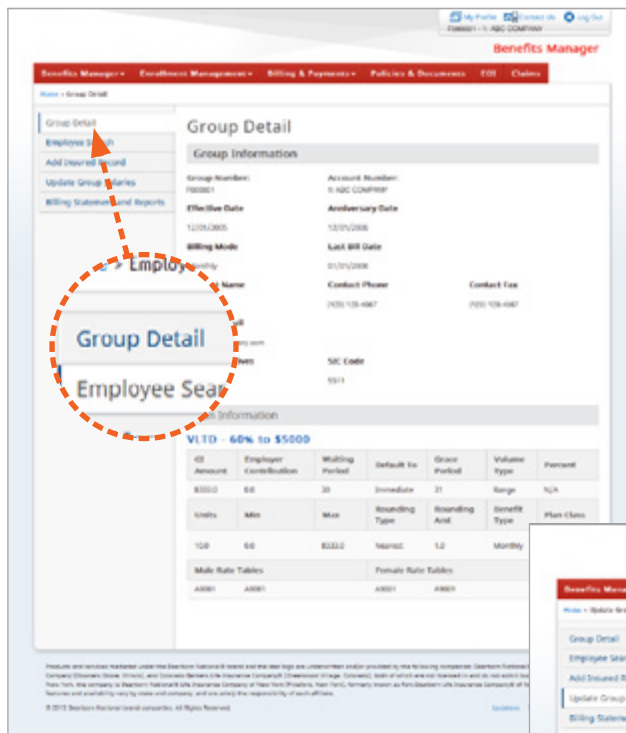


Diagram 5

## Group and Plan Information:

**Step 4:** Click on the Group Detail link in the left-hand side navigation (Diagram 5).

Group Information will appear, including a table for each plan defined for that group.

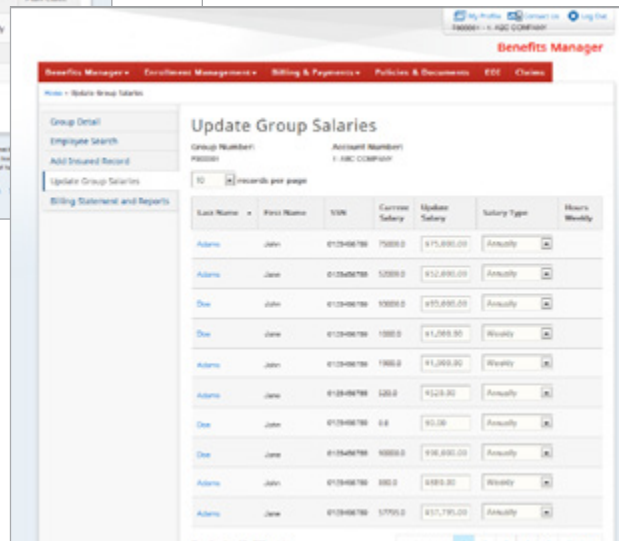


Diagram 6

## Update Salaries:

The update Group Salaries page will allow you to update both the salary amount and type (Diagram 6).

**This concludes Section 1 of 5.**

**Click "Next" below to continue to Section 2 of Benefits Manager.**

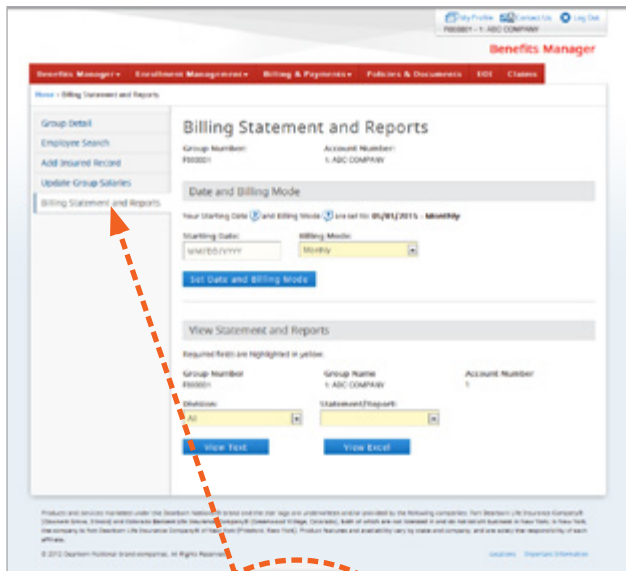
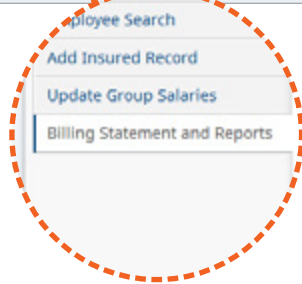


Diagram 7



## Section 2:

### Group Billing and Payment Information

From the Billing Statement and Reports page various reports can be printed in either **text** or **excel** format.

**Step 1:** Click on the Billing Statements and Reports link in the left-hand side navigation (Diagram 7).

**Step 2:** Previously saved billed information will appear. Additional help is available on screen.

**This concludes Section 2 of 5.**

**Click “Next” below to continue to Section 3 of Benefits Manager.**

## Section 3:

# Downloading Documents

To begin, click on Policies & Documents (Diagram 8)

**Step 1:** Select the desired Document and Product type, then click "Search" (Diagram 8).

**There are 5 Document Types to choose from:**

**Amendment** - a copy of any changes to your contract.

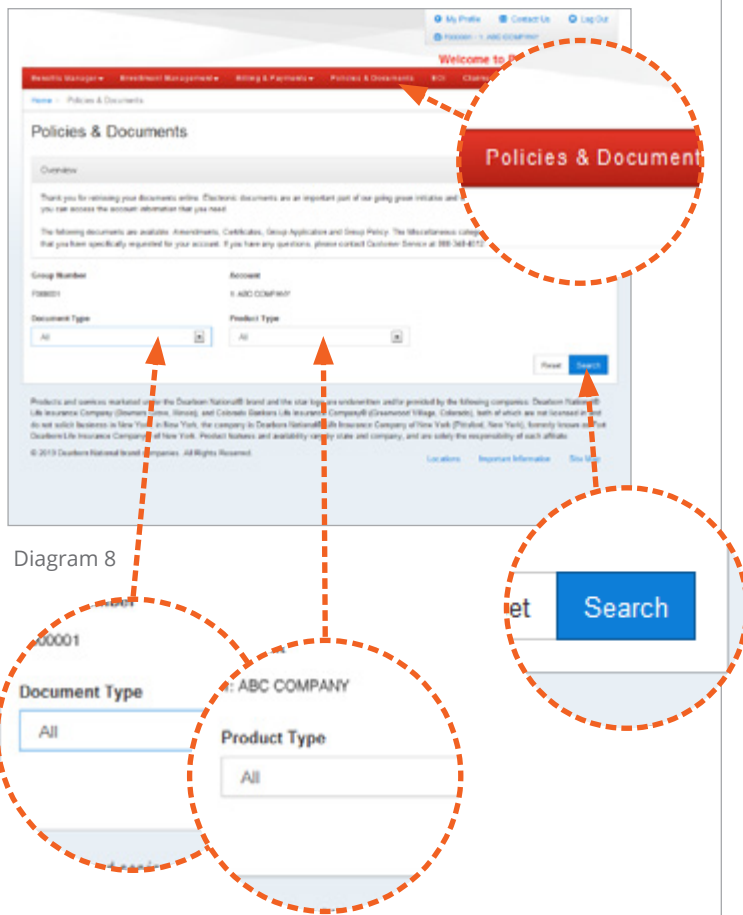
**Certificate** - a copy of your group certificate.

**Group Application** - a copy of your group's application.

**Group Policy** - a copy of your group policy.

**Rate Grid** - rate grids applicable to your group's coverage.

**Miscellaneous** - may contain enrollment forms or rate grids applicable to your group's coverage.



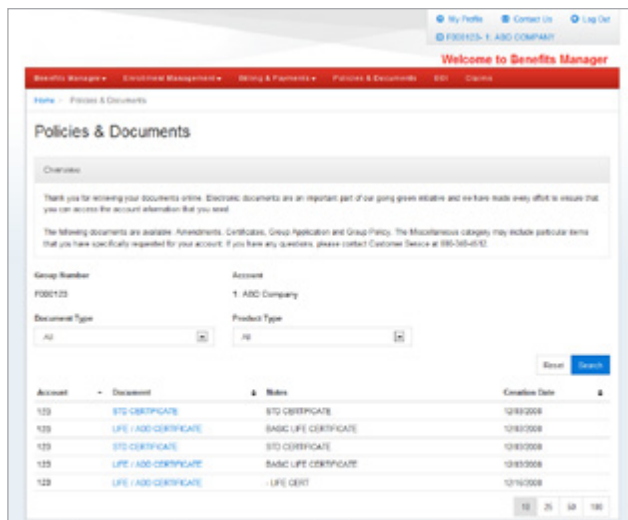


Diagram 9

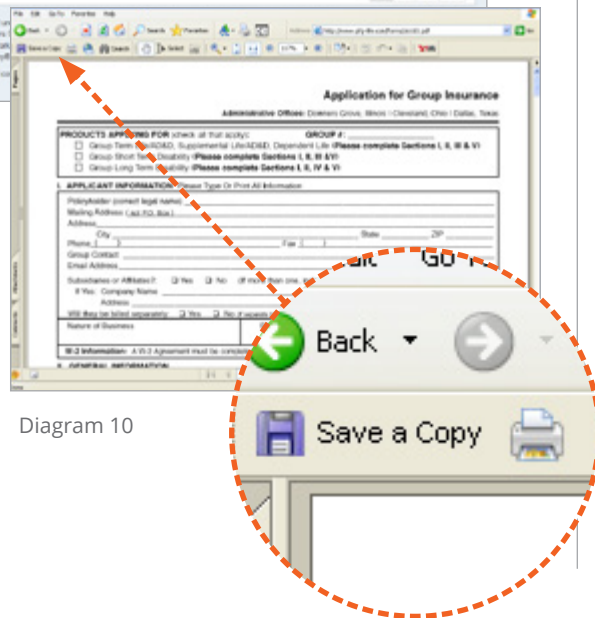


Diagram 10

 **Tip:** You can sort documents by Account Number, Document Notes and Creation Date (Diagram 9).

All documents are in PDF format and can be printed and/or downloaded.

 **Tip:** To print the document, click on the printer icon (Diagram 10). To download the document, click on the diskette icon and designate where you want to save the document (Diagram 10).

**This concludes Section 3 of 5.**

**Click "Next" below to continue to Section 4 of Benefits Manager.**



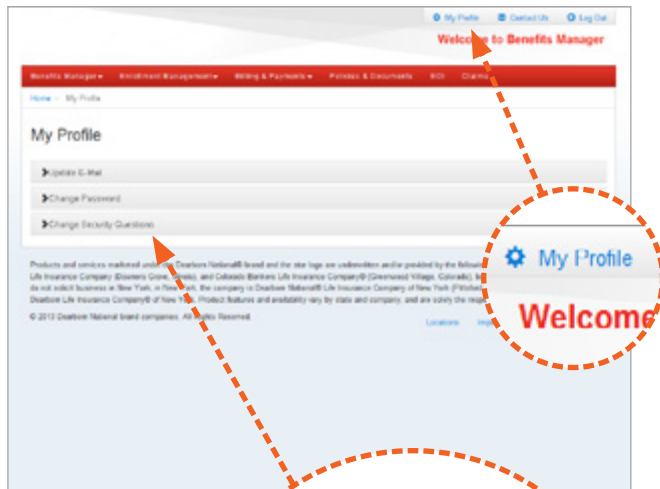
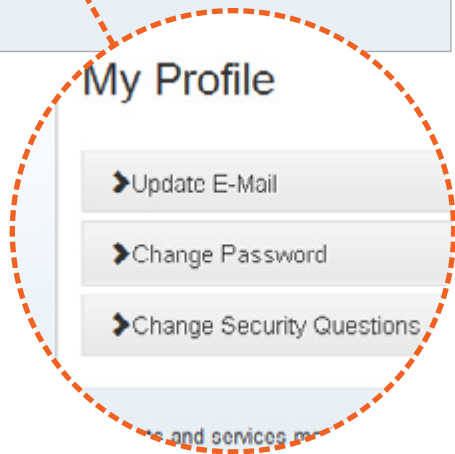


Diagram 14



## Section 4:

# Profile Management

**My Profile (Diagram 14) is where to manage user information.**

**There are 3 categories to choose from:**

- 1. Update E-mail** - Change the e-mail address we use as part of our Change Password verification process.
- 2. Change Password** - Change the password you use to access Benefits Manager.
- 3. Change Security Questions** - Manage the questions we will ask in case you forgot your password.

**This concludes Section 4 of 5.**

**Click “Next” below to continue to Section 5 of Benefits Manager.**

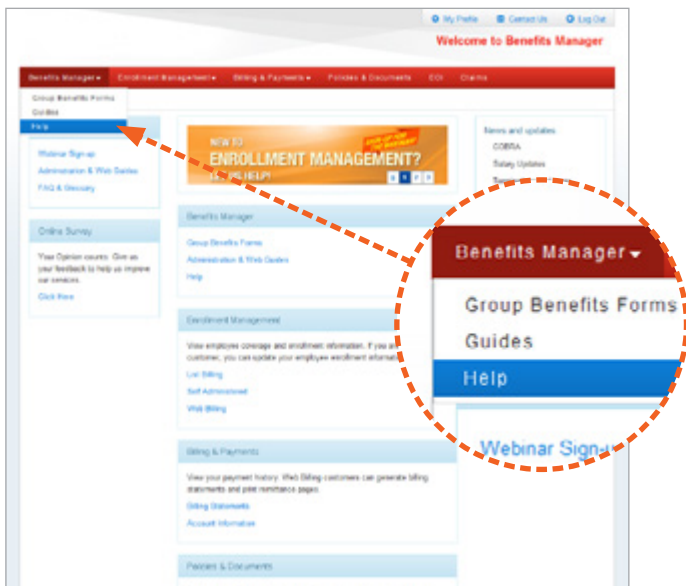


Diagram 15

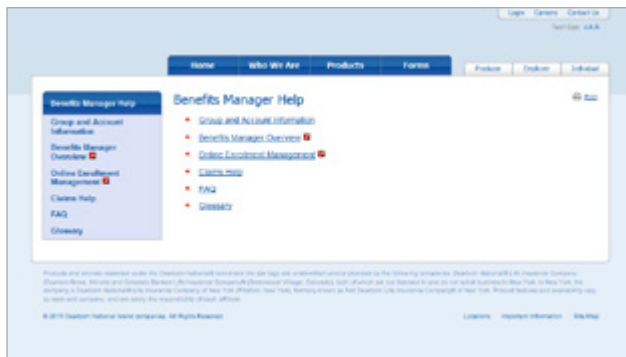


Diagram 16

## Section 5:

### Help and Frequently Asked Questions

If you need assistance click on “Help” from the submenu anywhere in Benefits Manager (Diagram 15).

The Help window (Diagram 16) contains 7 categories to choose from:

- |                                  |                |
|----------------------------------|----------------|
| 1. Help Main Menu                | 5. Claims Help |
| 2. Group and Account Information | 6. FAQ         |
| 3. Benefits Manager Overview     | 7. Glossary    |
| 4. Web Billing Help              |                |

**This concludes Section 5 of 5.**

Thank you for using Benefits Manager.