Group Portal

Quick Reference Guide

Key Phone Numbers

Group WebsiteSupport
................................See *Contact Us*
Keystone Billing..........215-567-3357
Enrollment Fax...........215-238-7067
Member Website Support
..................................215-567-4002
..................................800-626-6076

Note: This guide contains an overview of the transactions that are most commonly used. Please refer to the **Resource Center** for detailed reference materials.

Home Page Transactions

Employer Information

1 *Click* the Employer Information link to view information such as Employer ID, name, address, and group list.

2 To view group level information, *click* the desired group number. The Group screen displays group- level demographics, benefit summaries, and a list of associated accounts.

3 To view a benefit summary, simply *click* the desired coverage code.

Portal Administration

Click the Portal Administration link to process the following transactions:

To Add a New Portal User

1 *Click* the **Add a New Portal User** link**.**

2 *Complete* the **User Information** and **Temporary Password** fields.

3 *Select* the appropriate user permissions, and *click* the **Submit** button Submit.

To Edit an Existing User

1 *Click* the **Edit** link that appears before the user's name.

2 Make the desired edits.

3 *Click* the **Submit** button Submit.

To Delete a User

1 *Click* the **Delete** link that appears before the user's name.

2 A pop-up message will appear asking if you are sure that you want to delete the user. *Click* **OK**.

IBC Reports

Click the IBC Reports link to view the following suite of reports:

Membership Reports

- COBRA
- Subscriber Dependent Summary
- Subscriber History
- Subscriber List

Student Reports

- Overage Student Report
- Student Verification Max Age
- Student Verification Min Age
- Student Verification Recert Report
-

Utilization Reports (if applicable)

- Medical
- Pharmacy

Additional Reports

- Current Transaction History
- Transaction History Archives

Request ID Cards

1 *Click* the **Request ID Cards Icon** from the home page.

2 *Enter* the subscriber's Member ID or SSN.

3 *Click* the **Show Results** button Show Results.

4 *Select* the radio button next to the subscriber's name, and *click* the Print Temporary Cards Only button or Order Cards button. If only temporary cards are required, please proceed to **Step 6.**

5 *Select* the checkbox next to any member who requires an ID card, and *click* the **Submit** button Submit. Review the confirmation page and print temporary ID cards if needed. Your transaction is now complete.

Note: *If you do not want to display/print temporary cards, deselect the* **"Display temporary card on next page"** *check box, prior to clicking the* ***Submit*** *button.*

Also, the ID cards that appear on this screen are samples that do not reflect the coverage your company offers.

6 *This step is for requesting Temporary ID cards **ONLY**.* Verify the information on the temporary ID card is correct, then *click* **print this page**.

Worksite Wellness

Review the Worksite Wellness link to obtain information on promoting Worksite Wellness in your office.

Message Center

The Message Center displays important announcements from IBC. Announcements display in date order from the oldest to the most current. A bolded exclamation point precedes all urgent messages.

To view a message in its entirety, simply *click* the message's title.

Enrollment Tab Transactions

Overall To-Do List

The **Overall To-Do List** displays items that are awaiting completion or your approval.

1 View your **Overall To-Do List** from the **Enrollment** tab Enrollment.

2 Review the items in your **Overall To-Do List** regularly.

3 Use the **Filter To-Do List** drop-down menu to display specific **To-Do List** items.

4 In addition to the **Overall To-Do List**, an **Employee To-Do List** displays on each employee's record. The **Employee To-Do List** displays open items for completion or approval specific to the employee. The **System Notes** field will display additional details regarding transactions.

Searching for an Employee

Using the Search Box

1 To view a specific employee's record, use the search box at the top of your screen. *Click* the drop-down menu to select the radio button for the appropriate search parameter.

2 *Complete* the Search box with the appropriate information based on your search parameter (e.g., Name, SSN, Member ID, etc.) Then, *click* the **Search** button Search.

3 If there is an exact match, the employee's record will display automatically. If there are multiple records that match your search, the results will display in the **Active Employees**, **Terminated Employees**, and **Dependents** tabs.

4 If multiple matches display, *select* the desired employee by *clicking* his or her name.

Performing an Advanced Search

1 *Click* the **Advanced Search** Icon and define your search parameters.

2 *Click* the **Search** button Search.

3 Your results will display in the **Active Employees**, **Terminated Employees**, and **Dependent** tabs. However, if an exact match exists, the employee's record will display automatically.

COBRA Manager

1 *Click* the **COBRA Manager** icon to view COBRA information on your employees.

2 Employees will display in the following three tabs:

- **Cobra Participants**
  Cobra Participants
  - Displays active COBRA Participants.
- **New Benefit Enrollees**
  New Benefit Enrollees
  - Displays employees recently enrolled in benefits that will later become eligible for COBRA.
- **Cobra Eligible Persons**
  Cobra Eligible Persons
  - Displays any employee that is eligible for COBRA, but is not enrolled (active and terminated employees are listed).

Adding a New Employee

1 *Click* the **Add New Employee** icon or *click* **Add New Employee** from the **Enrollment** tab Enrollment.

2 *Complete* the following required fields:

- SSN
- First and Last Name
- Full address
- Date of birth (MMDDYYYY)
- Gender
- Hire date

3 *Click* the Save and go to employee to add benefits.

Adding Benefits to an Employee

1 To add benefits for **a new employee** proceed to **Step 2**. To add benefits for **an existing employee**, first *complete* an employee search and then *click* the **Benefits** Benefits tab from the employee's record.

2 From the **Summary** tab Summary, locate the **To-Do List** and *click* the **Start** button Start under **Sections to Be Completed**.

3 The **Accept** radio button is the default selection; *Select* the **Refuse** radio button if employee is not electing benefits. Otherwise, leave the **Accept** radio button selected, and *click* the **Next** button Next.

4 If the employee accepted benefits, proceed to **Step 5**. However, if the employee refused benefits, *click* Save and Go to Summary to complete your transaction.

5 *Select* the employee's plan.

Note: You may be required to accept additional plan components for bundled benefit offerings (i.e., drug, dental, or vision)

6 *Select* the Coverage Level that the employee is choosing, and then *click* **Next** button Next.

7 If member has selected coverage other than "**Employee Only**", you will need to add dependents.

8 *Click* the **Add Another Dependent** button Add Another Dependent

9 *Enter* all required information for the dependent. To add additional dependents, *click* the **Save, Add Another** button Save, Add Another. If there are not any additional dependents to add, *click* the **Save** button Save.

10 After adding all dependents, *click* the **Next** button Next on the **Persons Covered** screen.

11 If the employee has elected HMO coverage, *enter* PCP's code. If the employee has not provided the PCP's code, *click* the **Search** button Search to complete a provider search. Next, indicate if the member is a current patient by *selecting* either the **YES** or **NO** radio buttons. *Click* the **Next** button Next.

12 If the employee or any of the dependents have Medicare coverage, *click* the **Yes** radio button. Then, *complete* all required fields and *click* the **Add** button Add. However, if the employee and the dependents do not have Medicare coverage, ensure the **No** radio button is selected, and *click* the **Next** button Next.

13 If the employee or any of the dependents have additional insurance coverage, *click* the **Yes** radio button. Then, *complete* all required fields and *click* the **Add** button Add. However, if the employee and the dependents do not have additional insurance coverage, ensure the **No** radio button is selected, and *click* the **Next** button Next.

14 Verify the effective date is correct and then *click* the **Next** button Next.

15 Confirm that all the information is correct, and *click* Save and Go to Summary if the employee's benefit elections are complete. To accept or refuse additional benefits, *click* Save and Go to Benefits.

*Note: Your transaction may require that you assign a group/account number. If required, your transaction is not complete until you assign a group/account number. Check the **Employee To-Do list** to verify if you must **Assign Values**. If so, complete the group/account number selection to finish your transaction.*

Adding Dependents to an Existing Employee

1 Locate the employee through the search feature.

2 *Click the* **Benefits** tab Benefits.

3 *Click* the **Edit** button [Edit].

4 *Click* the **Edit Due to Change Reason** button [Edit due to Change Reason].

5 *Select* a reason for medical change from the drop-down menu, and *click* the **Next** button [Next].

Note: If you select ***Other*** as the reason for change, please move to Step 7.

6 *Enter* the Life Event details and *click* the **Next** button [Next]

Note: If you selected the *Other (Correction, etc.)* option, you will not be required to enter Life Event details. Proceed to the next step.

7 *Select* the **Edit** button [Edit] next to Coverage Level to edit the coverage level if necessary.

8 *Click* the **Add Another Dependent** button [Add Another Dependent].

9 *Complete* the required fields.

10 If entering additional dependent *click* the **Save, Add Another** button [Save, Add Another]. If there are no additional dependents *click* the **Save** button [Save].

11 Once all dependents are added, *click* [Next] on the Persons Covered screen.

12 Answer the Medicare / Additional Insurance questions, and add any other insurance information if applicable. If there is no other insurance, *click* the **Next** button [Next].

13 Verify effective date (based on group rules), and *click* the **Next** button [Next].

14 Verify that all entries are correct and then *click* [Save and Go to Summary] if completed with benefits.

Click [Save and Go to Benefits] if you need to accept/refuse additional benefits.

Note: If you offer freestanding ancillary options (e.g., drug, dental, or vision) in addition to medical, you may need to repeat the steps above to add dependents to additional plans.

Changing Employee Information

1 Locate the employee through the search feature.

2 *Click* the **Personal** [Personal] and/or **Work** [Work] tab.

3 Make the necessary updates, and enter the effective date of the change (MMDDYY).

4 Verify that all entries are correct, and then *click* [Save and Go to Summary].

Click [Save and Go to Benefits] if you need to continue to work with benefits.

Changing Dependent Information

1 Locate the employee through the search feature.

2 *Click* the **Dependents** tab [Dependents].

3 *Click* the **Edit** button [Edit] to make the necessary updates.

Note: This feature will only update the dependent's name and SSN. Changes to a dependent's DOB and gender must be completed through the ***Benefits*** *tab* [Benefits].

4 After making your edits, *click* the **Save** button [Save].

Changing an Employee's Coverage

1 *Click* the **Benefits** tab [Benefits].

2 *Click* the **Edit** button [Edit].

3 *Click* the **Edit Due to Change Reason** button [Edit due to Change Reason].

4 *Select* a reason for medical change from the drop-down menu, and *click* the **Next** button [Next]. **Note:** If you select ***Other*** as the reason for change, please move to Step 6.

5 *Enter* the Life Event details and *click* the **Next** button [Next].

Note: If you selected the *Other (Correction, etc.)* option, you will not be required to enter Life Event details. Proceed to the next step.

6 *Select* the **Edit** button [Edit] next to the current plan, and *select* the new plan. Then, *click* the **Next** button [Next].

Note: You may be required to accept additional plan components for bundled benefit offerings (i.e., drug, dental, or vision)

7 Verify all entries are correct and then *click* [Save and Go to Summary] if completed with benefits.

Click [Save and Go to Benefits] if you need to accept/refuse additional benefits.

Primary Care Physician (PCP) Changes

1 Use the search function to locate and *select* the employee.

2 *Click* the **Benefits** tab [Benefits].

3 *Click* the **Edit** button [Edit].

4 *Click* the **Edit** button [Edit] in the in the PCP section.

5 If the member has not provided the PCP's code, *click* the **Search** button [Search] to complete a provider search. Otherwise, *enter* the PCP's code.

6 Indicate if the member is a current patient by *selecting* either the **YES** or **NO** radio buttons. Then, *click* the **Next** button [Next].

7 *Select* a PCP change reason from the drop-down menu. Then, *click* the **Next** button [Next].

8 Verify that all entries are correct and then *click* [Save and Go to Summary] if completed with benefits.

Changing Other Insurance Information

1 Locate the employee through the search feature and then *click* the **Benefits** tab [Benefits].

2 *Click* the **Edit** button [Edit].

3 Locate the Additional Insurance or Medicare field. *Click* the **Edit** button [Edit] next to the appropriate other insurance field.

4 *Select* the "**Yes, and I have all the required information"** radio button.

5 *Complete* all required fields and then *click* the **Add** button [Add]. An asterisk ***** denotes a required field.

6 Indicate if there is further additional insurance information by *selecting* the appropriate radio button. If there is additional insurance information, go back to **Step 5**. Otherwise, *click* [Save and Go to Summary] if you are finished with benefits.

Click [Save and Go to Benefits] if you need to continue to work with benefits.

Cancel Coverage for an Employee

Note: This transaction will cancel only an employee's benefits. If you need terminate employment as well, please proceed to "Terminating an Employee"

1 From the **Benefits** tab [Benefits], *select* **Edit** [Edit].

2 *Click* the **Cancel Benefits for All** button [Cancel Benefits for All].

A pop-up warning will appear, *click* OK to proceed.

3 *Select* a reason for medical change from the drop-down menu, and *click* the **Next** button [Next]. Then, *enter* the Life Event details and *click* the **Next** button [Next].

Note: You may be required to accept the cancellation of additional plan components for bundled benefit offerings (i.e., drug, dental, or vision)

4 An end date will display based on group rules and the Life Event date. Verify the end date to ensure it is correct. To make a change to the **End Date** click the **Edit** button [Edit].

5 Verify that all other entries are correct, and then *click* [Save and Go to Summary] if completed with benefits. *Click* [Save and Go to Benefits] if you need to cancel additional benefits.

Terminating an Employee

Note: This action cancels benefits and terminates the employee

1 Use the search function to locate and *select* the employee.

2 From the **Summary** tab [Summary], *select* **Terminate Employment** from the Administrative Tools section.

3 *Enter* the termination date in the **Employment Termination Date** field. *Click* the **Next** [Next] button to proceed.

4 The termination date will automatically display for any benefit that the employee elected. After verifying the dates are accurate, *click* the [Save and Go to Summary] button.

Cancel Coverage for a Dependent

1 Locate the employee through the search feature and then *click* the **Benefits** tab [Benefits].

2 *Click* the **Edit** button [Edit].

3 *Click* the **Edit Due to Change Reason** button [Edit due to Change Reason].

4 *Select* a reason for medical change from the drop-down menu, and *click* the **Next** button [Next].

Note: If you select ***Other*** as the reason for change, please move to Step 6.

5 *Enter* the Life Event details and *click* the **Next** button [Next].

Note: If you selected the *Other (Correction, etc.)* option, you will not be required to enter Life Event details. Proceed to the next step.

6 If the coverage level will change, *click* the **Edit** button [Edit] next to the Coverage Level. Then, *select* the appropriate coverage level and *click* the **Next** button [Next]. Move to **STEP 6**. However, if the coverage level is not changing, click the **Edit** button [Edit] next to Persons Covered.

7 On the **Persons Covered** screen, *click* the **Cancel Coverage** button [Cancel Coverage] next to the dependent you would like to cancel.

8 An end date will display based on group rules and the Life Event date. Verify the end date to ensure it is correct. To make a change to the **End Date** click the **Edit** button [Edit].

9 Verify that all other entries are correct, and then *click* [Save and Go to Summary].

Click [Save and Go to Benefits] if you need to cancel additional benefits.

Rehire Employee

1 Use the search function to locate and *select* the employee.

2 From the **Summary** tab [Summary], *select* "Rehire Employee."

3 Follow the **Rehire Wizard** to reinstate the member's benefits.

4 *Click* the **Save** button [Save] and then *click* the [Save and Go to Summary] button.

Reinstating an Employee's Benefits

1 Locate the employee through the search feature.

2 *Click* the **Benefits** tab [Benefits].

3 *Click* the **Edit** button [Edit].

4 *Click* the **Edit Due to Change Reason** button [Edit due to Change Reason].

5 *Select* a reason for medical change from the drop-down menu, and *click* the **Next** button [Next].

Note: If you select ***Other*** as the reason for change, please move to Step 7.

6 *Enter* the Life Event details and *click* the **Next** button [Next].

Note: If you selected the *Other (Correction, etc.)* option, you will not be required to enter Life Event details. Proceed to the next step.

7 *Click* the **Edit** button [Edit] next to the benefits you would like to reinstate.

8 *Select* the **Accept** radio button.

9 *Select* the desired plan, and then *click* the **Next** button [Next].

10 *Select* the coverage level, and then *click* the **Next** button [Next].

11 Click the **Apply Coverage** button next to any dependent that needs to be covered. Click the **Add Another Dependent** button to add additional dependents. Click the **Next** button [Next] to proceed.

12 Complete Medicare and Additional Information questions, click the **Next** button [Next] after each section.

13 Verify the effective date of coverage, and then *click* the **Next** button [Next].

14 Verify that all entries are correct, and then *click* [Save and Go to Summary]. *Click* [Save and Go to Benefits] if you need to add additional benefits.

Recertifying a Student

1 Locate the employee through the search feature.

2 *Click* the **Benefits** tab [Benefits].

3 *Click* the **Edit** button [Edit].

4 *Click* the **Edit Due to Change Reason** button [Edit due to Change Reason].

5 *Select Student Verification for Reinstate* from the drop-down menu, and *click* the **Next** button [Next].

6 *Select* the **Yes** radio button, and then *enter* the applicable reenrollment date for the student, as well as the date of notification. Then, *click* the **Next** button [Next].

7 *Select* the **Edit** button [Edit] next to Coverage Level to edit the coverage level if necessary.

8 *Click* the **Edit** button [Edit] next to Persons Covered field.

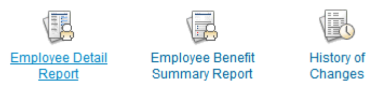
9 *Click* the **Recertify Student** button next to the appropriate dependent.

10 *Click* the **Next** button [Next].

11 Verify that all entries are correct, and then *click* [Save and Go to Summary]. *Click* [Save and Go to Benefits] if you need to add additional benefits.

Employee-Specific Reports

On each employee's record, you will find Employee-Specific Reports. These reports display on the **Summary** tab.



- **Employee Detail Report**
- **Employee Benefit Summary Report**
- **History of Changes Report**

Reports Tab

The **Reports** tab will provide you with access to more than 30 customizable reports.

The most popular reports are:

- **To Do List**
- **Benefit Detail Report**
- **Employee Benefit Summary Reports**
- **Employee Census**
- **Transaction History**