UnitedHealthcare®
Specialty Benefits℠

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eAdministration
User Guide

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UnitedHealthcare Specialty Benefits
6300 Olson Memorial Highway
Golden Valley, MN 55427

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CHAPTER 1: SYSTEM OVERVIEW

PURPOSE

UnitedHealthcare is pleased to announce the availability of our on-line information system identified as eAdministration. You may access eAdministration by visiting www.uhcfinancialprotection.com

eAdministration provides on-line access to the systems through a single sign-on process:

- E-Bill Services
- Forms Library
- Report Portal

BEFORE YOU BEGIN

You must obtain a user id and password to access these systems through the single sign-on process. Not all users will have access to every system. One user from your organization will be setup as a "Super User" and be given the ability to add and maintain additional users. A welcome letter with be sent to this user and will contain a user id and a temporary password.

Once additional users have been setup by the Super User, these users will receive two email messages. One email will be sent by the Super User announcing completion of the user setup and will provide your specific user id. The other email will be sent by our system providing your temporary password. When you login for the first time you will be able to create a new password and provide security information that will be used to reset your password, if necessary.

IN THIS CHAPTER

The following sections are included in this chapter:

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Section 1: System Requirements

PURPOSE

The purpose of this section is to provide detailed information regarding system requirements necessary to access *eAdministration* effortlessly and efficiently.

IN THIS SECTION

The following topics are included in this section:

Minimum System Requirements

The *eAdministration* system has been tested using the following:

- Microsoft® Windows® XP, 2003 or later version
- Microsoft Internet Explorer® 6.0 or later version
- Adobe® Acrobat® Reader® 7.0 or later version
- Internet Options – Privacy settings at “Medium”
- Pop-up Blocker setting to allow pop-ups on this web site

Optimal system experience

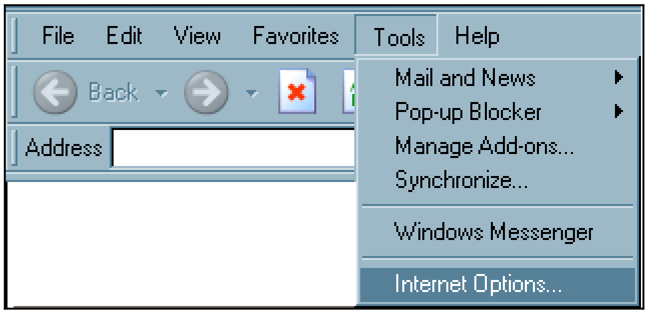
- Ability to use an Internet web browser
- A basic understanding of reporting, spreadsheets, PDF files, etc.

Microsoft Internet Explorer setup

Privacy Settings

To verify your Internet Options **Privacy Settings**, please follow these steps:

1. Open the Microsoft Internet Explorer web browser.
2. Click on the Tools, Internet Options menu option from the top toolbar.



3. The Internet Options window opens.

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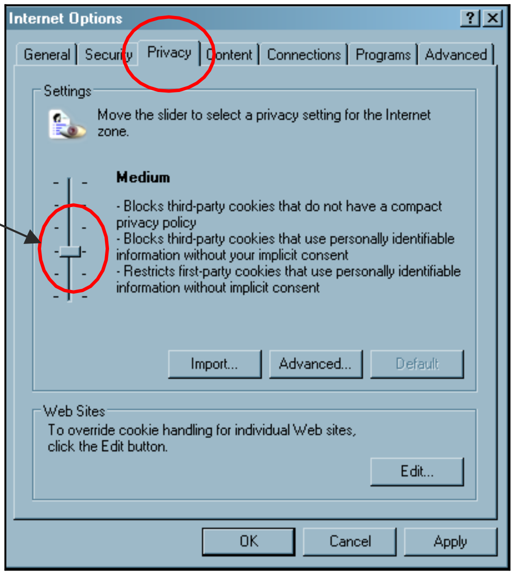
4. Select the Privacy tab.



Move the slider to select a privacy setting for the Internet zone.

Medium

- Blocks third-party cookies that do not have a compact privacy policy
- Blocks third-party cookies that use personally identifiable information without your implicit consent
- Restricts first-party cookies that use personally identifiable information without implicit consent

To override cookie handling for individual Web sites, click the Edit button.

Slider bar

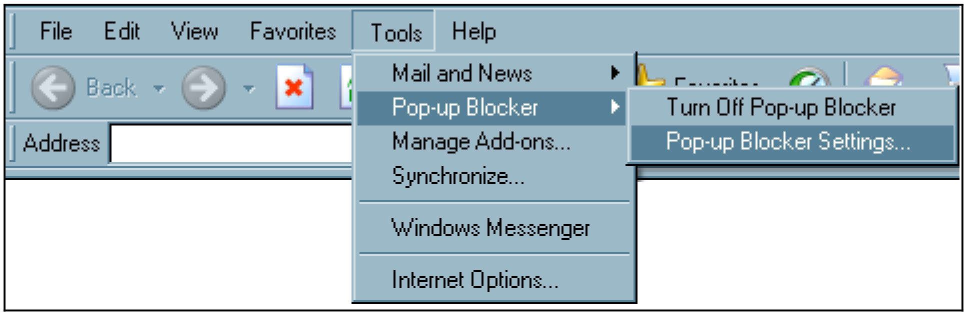
5. Move the slider bar until the settings is set to "Medium".
6. Click **<OK >** to close the INTERNET OPTIONS window and save the settings.

Your privacy settings will be set at the correct level to use the *eAdministration* website.

Pop-up Blocker

To set your **Pop-up Blocker** to allow pop-up windows from our website on your Microsoft Internet Explorer, please follow these steps:

1. Open Microsoft Internet Explorer.
2. Click on the Tools, Pop-up Blocker, and Pop-up Blocker Settings menu options.



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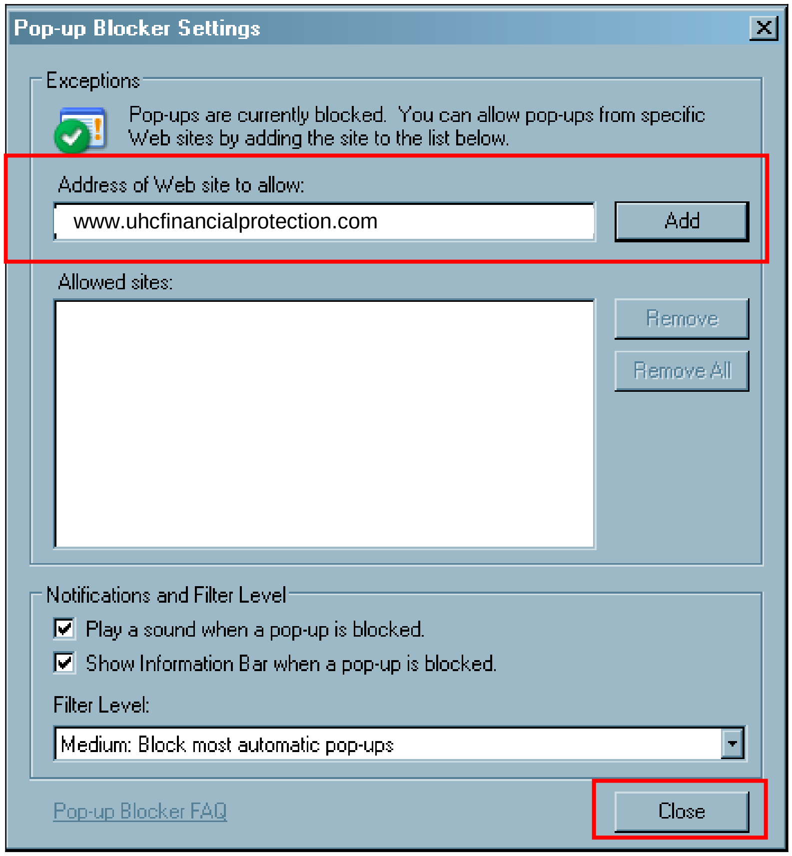
3. The Pop-up Blocker Settings window opens:



Pop-ups are currently blocked. You can allow pop-ups from specific Web sites by adding the site to the list below.

Address of Web site to allow: www.uhcfinancialprotection.com

Allowed sites:

☑ Play a sound when a pop-up is blocked.

☑ Show Information Bar when a pop-up is blocked.

Filter Level: Medium: Block most automatic pop-ups

Allowed sites:
www.uhcfinancialprotection.com

4. Type the following into the Address of Web site to allow: field:

   www.uhcfinancialprotection.com

5. Click **<Add >** to move our web address to the Allowed sites section.
6. Click **<Close >** to close the window.

You will now be able to view information that is displayed in a separate window while in the *eAdministration* systems

Section 2: Getting Started

PURPOSE

The purpose of this section is to provide detail information regarding the requirements necessary to effectively access the *eAdministration* system.

BEFORE YOU BEGIN

You will need the following information to access the *eAdministration* system:

- User id created by UnitedHealthcare Specialty Benefits or the group or subgroup Super User
- Temporary password generated by UnitedHealthcare Specialty Benefits or the user maintenance system.

IN THIS SECTION

The following topics are included in this section:

- For problems with your login, contact our Help Desk at 1-866-322-1210.
- Select prompt 2 for technical on-line issues or password reset.
- For e-Bill users:The e-Bill system is available Monday through Friday between 6:00 am and 9:00 pm CST/CDT.
- Note : The site is best viewed in Internet Explorer 8 and Mozilla Firefox. If you are using Internet Explorer 11 add this site to Compatibility settings

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Opening eAdministration

To open the *eAdministration* screen, please follow these steps:

1. Open the Microsoft Internet Explorer web browser.
2. Enter the following URL into the address field:
   www.uhcfinancialprotection.com

Single Sign-On Process

To open the ***eAdministration*** home page, please follow these steps:

1. Click on the USER ID field and type in the user id assigned to you.
2. Use the **<Tab >** key or click on the PASSWORD field and type in the temporary password assigned to you or the one you created upon your first login.
3. Click **<Log In>** to authenticate your user profile.

For assistance with your login, please contact our help desk at 1-866-322-1210. At the prompt, select “2” for technical issues.

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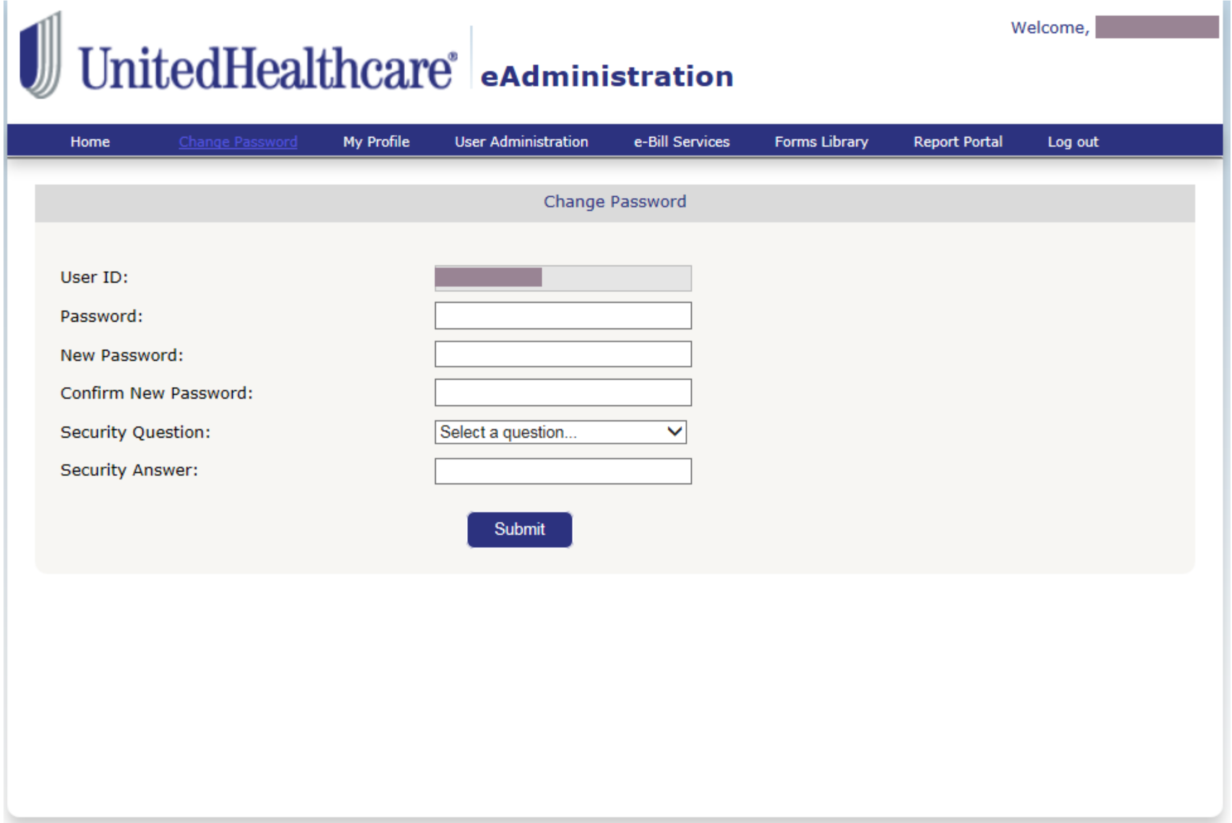

Welcome, [redacted]

Change Password

User ID: [redacted]
Password:
New Password:
Confirm New Password:
Security Question: Select a question...
Security Answer:

First Time Login

If this is the first time you have logged into *eAdministration*, please follow these steps:

1. Click on the Password field and type in the temporary password emailed to you.
2. Use the **<Tab >** key or click on the NEW PASSWORD field and type in a password known only to you.

> **Notes:**
> Passwords are case sensitive and must be at least 8 characters long with a maximum of 16 characters and contain at least one number and one letter.
>
> You will use the password that you have created each time you log on to the *eAdministration* system.
>
> You are given three attempts to log on to the *eAdministration* system. If you are unsuccessful after three tries, you will be locked out of the system and must have your password reset by the Group or Subgroup Super User or our technical support team.
>
> Call the Help Desk at 1-866-322-1210 for technical assistance.

3. Use the **<Tab >** key or click on the CONFIRM NEW PASSWORD field and type in the same password from Step 2.

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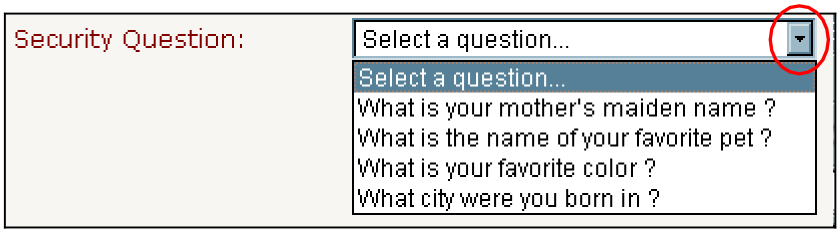
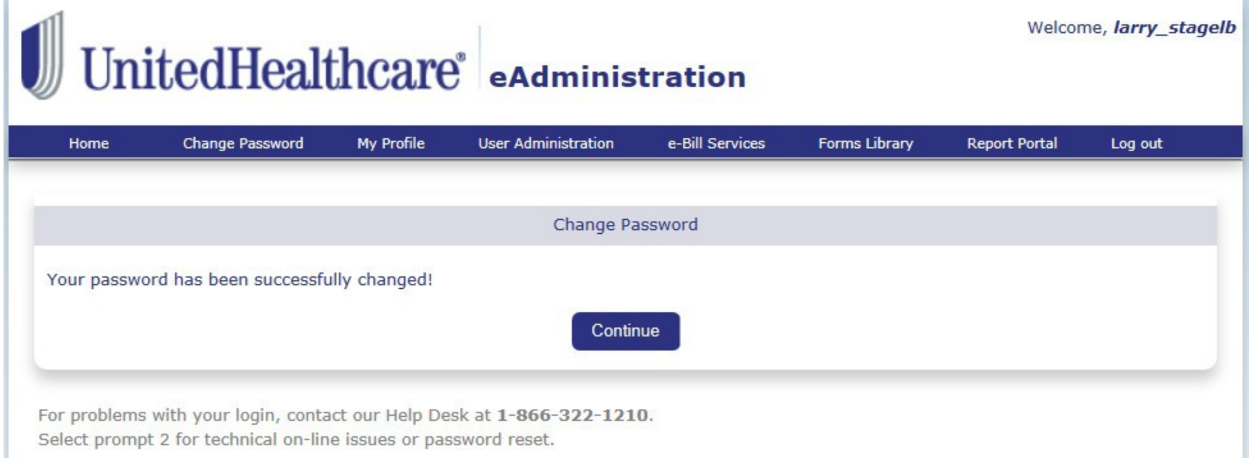
First Time Login (cont.)



Security Question: Select a question...

Note: For security purposes you are required to select a security question and enter a response. This will be important if you forget your password in the future.

4. Click on the down arrow in the SECURITY QUESTION field to open the drop-down list.
5. Select an option by clicking on it.
6. When the Security Question is selected, use the **<Tab >** key or click on the SECURITY ANSWER field and type in a response.
7. Click **<Submit >** to process the change password function.
8. If your user id and password has successfully been authenticated, a confirmation message will appear.



Welcome, ***larry_stagelb***

Your password has been successfully changed!

For problems with your login, contact our Help Desk at **1-866-322-1210**.
Select prompt 2 for technical on-line issues or password reset.

9. Click **<Continue >** to close the confirmation message.

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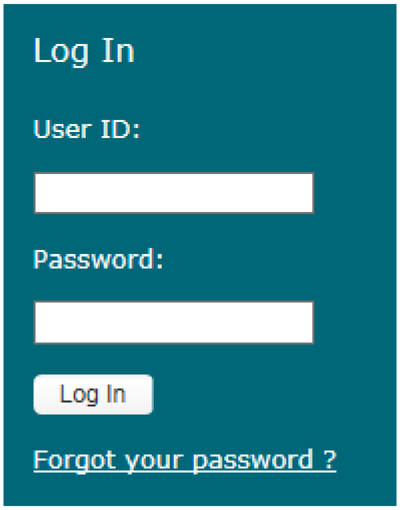
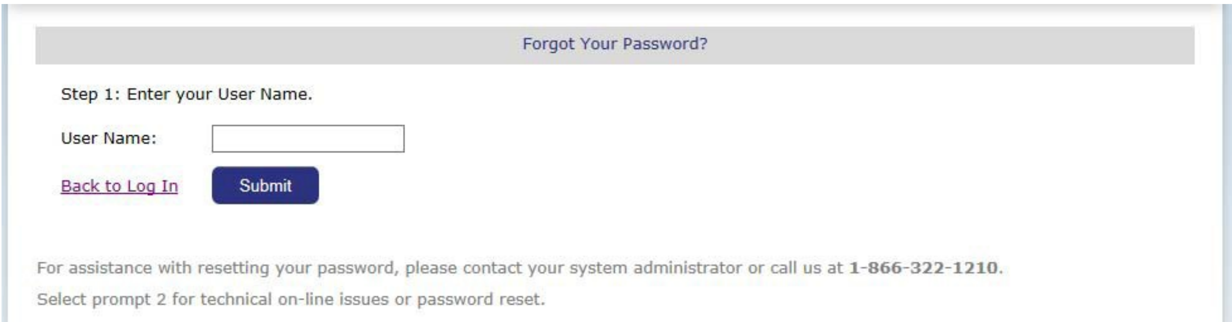


Forgot your password

If you forget your password, you will be able to reset it if you know your user name and the answer to the security question previously selected.

To reset your password, please follow these steps:

1. On the **Log In** screen, click on the Forgot your password link.
2. The **Step 1: Enter your User Name** screen opens.



Step 1: Enter your User Name.

For assistance with resetting your password, please contact your system administrator or call us at **1-866-322-1210**.

Select prompt 2 for technical on-line issues or password reset.

3. Type in your user id into the User Name: field.
4. Click **<Submit >** to authenticate your user id.
5. If your user id is verified, the **Step 2: Answer the following question to reset your password** screen opens and displays your selected security question.

Continued next page...

Forgot your Password ?

Step 2: Answer the following question to reset your password.

User ID: [redacted]

Question: [redacted]

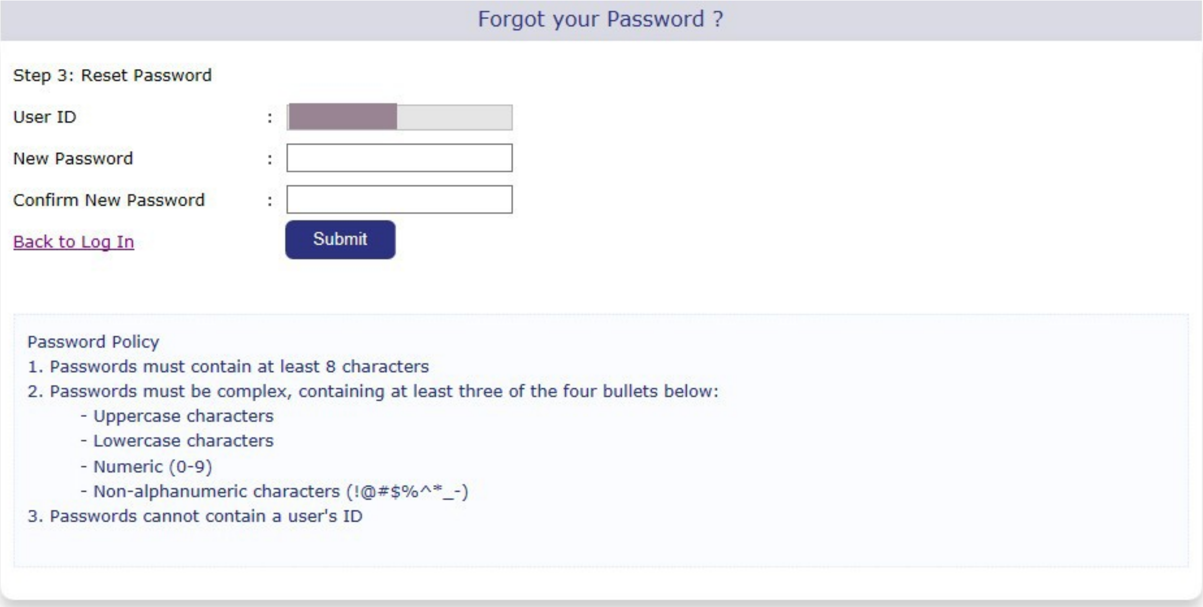
Answer:

For assistance with resetting your password, please contact your system administrator or call us at **1-866-322-1210**.

Select prompt 2 for technical on-line issues or password reset.

> **Note:** If no security question has been found for the User Name entered, you will receive an error message: The security question for the User ID entered cannot be found.
>
> If you receive this error message, contact your group or subgroup Super User.

6. Click on the ANSWER field and type in the correct response to the security question.
7. Click **<Submit >** to authenticate your user profile.
8. If the security answer passes authentication, the **STEP 3: RESET PASSWORD** screen opens.



Forgot your Password ?

Step 3: Reset Password

User ID : [redacted]

New Password :

Confirm New Password :

Password Policy
1. Passwords must contain at least 8 characters
2. Passwords must be complex, containing at least three of the four bullets below:
   - Uppercase characters
   - Lowercase characters
   - Numeric (0-9)
   - Non-alphanumeric characters (!@#$%^*_-)
3. Passwords cannot contain a user's ID

9. Click on the NEW PASSWORD field and type in an appropriate password.

> **Remember:** Passwords are case sensitive and must be at least 8 characters long with a maximum of 16 characters and contain at least one number and one letter.

Continued next page…

Forgot your password (cont.)

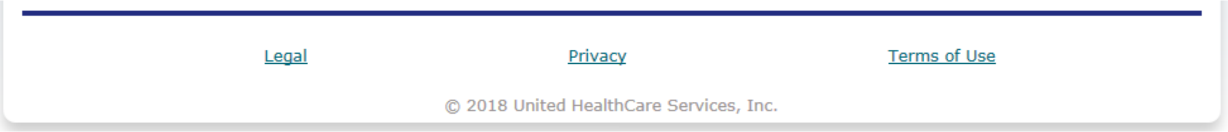
10. Use the **<Tab >** key or click on the CONFIRM NEW PASSWORD field and type in the same password from Step 9.
11. Click **<Submit >** to actually reset your password.
12. If the new password passes the guidelines, the new password will be added to your single sign on user profile. The **HOME** page will appear and display links to all the *eAdministration* systems you have access to.
13. Click on the Back to Log In link at anytime to cancel out of the password reset process and return to the *eAdministration* **Log In** screen.

Section 3: *eAdministration* Page Layout

eAdministration Page Layout

- The **Menu List** displays all the available systems for the user as links. You must click on the appropriate link to open that system.
- Only the group or subgroup Super User will have access to the USER ADMINISTRATION system. See **Chapter 7: User Administration** for more detailed information.
- Click on the Log out link to close the HOME screen and end the current Internet session.

Important: The web browser Back command button does not function for *eAdministration*.



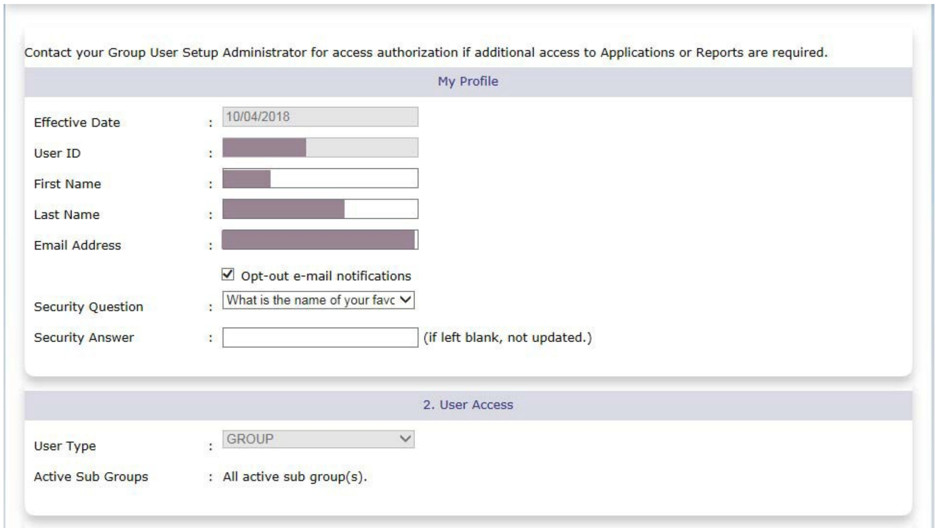
Internet Service Agreement and Privacy Policy

This is a private web site containing confidential information. Authorized site users must use this information for business purposes only. Any unauthorized use of the web site and/or the data contained on the site may be grounds for penalties, fines or criminal conviction.

The Internet Service Agreement and Privacy Policy links display at the bottom of each screen within the eAdministration system.

Clicking on these links will open a separate window to display the entire Internet Service Agreement or Privacy Policy. Please review the information in these links to become familiar with its content.

Section 4: My Profile



Contact your Group User Setup Administrator for access authorization if additional access to Applications or Reports are required.

My Profile

Effective Date : 10/04/2018

User ID : [redacted]

First Name : [redacted]

Last Name : [redacted]

Email Address : [redacted]

☑ Opt-out e-mail notifications

Security Question : What is the name of your favc

Security Answer : (if left blank, not updated.)

2. User Access

User Type : GROUP

Active Sub Groups : All active sub group(s).

My Profile

On the **MY PROFILE** screen you will be able to view the information currently setup on your user profile, plus you will be able to update your first and last name, email address, security information and opt out of automatic email notifications.

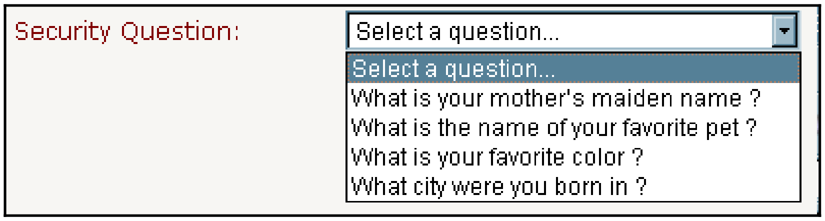
To view or update your user profile, please follow these steps:

1. Log on to the *eAdministration* HOME page.
2. Click on the **My Profile** link on the menu list to open the **MY PROFILE** screen.
3. The following fields are read only and cannot be updated. If any changes to the information in these fields is necessary, contact your company's Super User.
    - Effective Date
    - User ID
    - User Type
    - List of subgroups you currently have access to
    - List of applications you currently have access to
    - If appropriate, list of reports you currently have access to
4. You may update the fields in the IDENTITY section of the **MY PROFILE** screen.

Update Identity

To update the identity section of the **MY PROFILE** screen, please follow these steps:

1. Click on the FIRST NAME and/or LAST NAME field and type in the correct information.
2. Click on the EMAIL ADDRESS field and type in the correct email address.
3. Select or deselect the checkbox next to the opt-out email notifications indicator.
4. If you do not want to receive the on-line billing notification email that is automatically sent each month, select the OPT-OUT indicator by clicking on the checkbox. A checkmark will appear.
5. If you want to receive the e-Bill billing notification email, the checkbox must not be checked. Clicking on a checked checkbox will remove the checkmark.
6. To select a different security question, click on the down arrow of the SECURITY QUESTION field to open the drop-down list.
7. Click on an option from the drop-down menu list to select the security question.



8. To enter a new response to the selected security question, click on the SECURITY ANSWER field and type in the new response.
9. Click **<Submit>** at the bottom of the screen to save any changes made.
10. To close this screen without making any changes, select an option in the menu list at the left-hand side of the screen.
    - Log out to exit out of *eAdministration* and return to the **EMPLOYER** screen
    - Change Password to open the **CHANGE PASSWORD** screen
    - An application link to open the appropriate application; e-Bill Services, Forms Library or Report Portal.

CHAPTER 2: E-BILL SERVICES SYSTEM

PURPOSE

This chapter provides detailed information on opening and closing the on-line billing system.

UnitedHealthcare Specialty Benefits has simplified the process of reviewing, updating, submitting and paying invoices with the e-Bill Services system. This on-line billing system provides an easy, electronic, and secure way to update billing information, access a 12-month history of invoices and payments, and make electronic payments for premium due.

Important Note: By using this web site you agree to our Internet Service Agreement. The eAdministration system is a private web site containing confidential information. Authorized users must utilize this information for business purposes only. Any unauthorized use of the website and/or the data contained on the site may be grounds for penalties, fines or criminal conviction.

BEFORE YOU BEGIN

Log on to the *eAdministration* HOME screen.

IN THIS CHAPTER

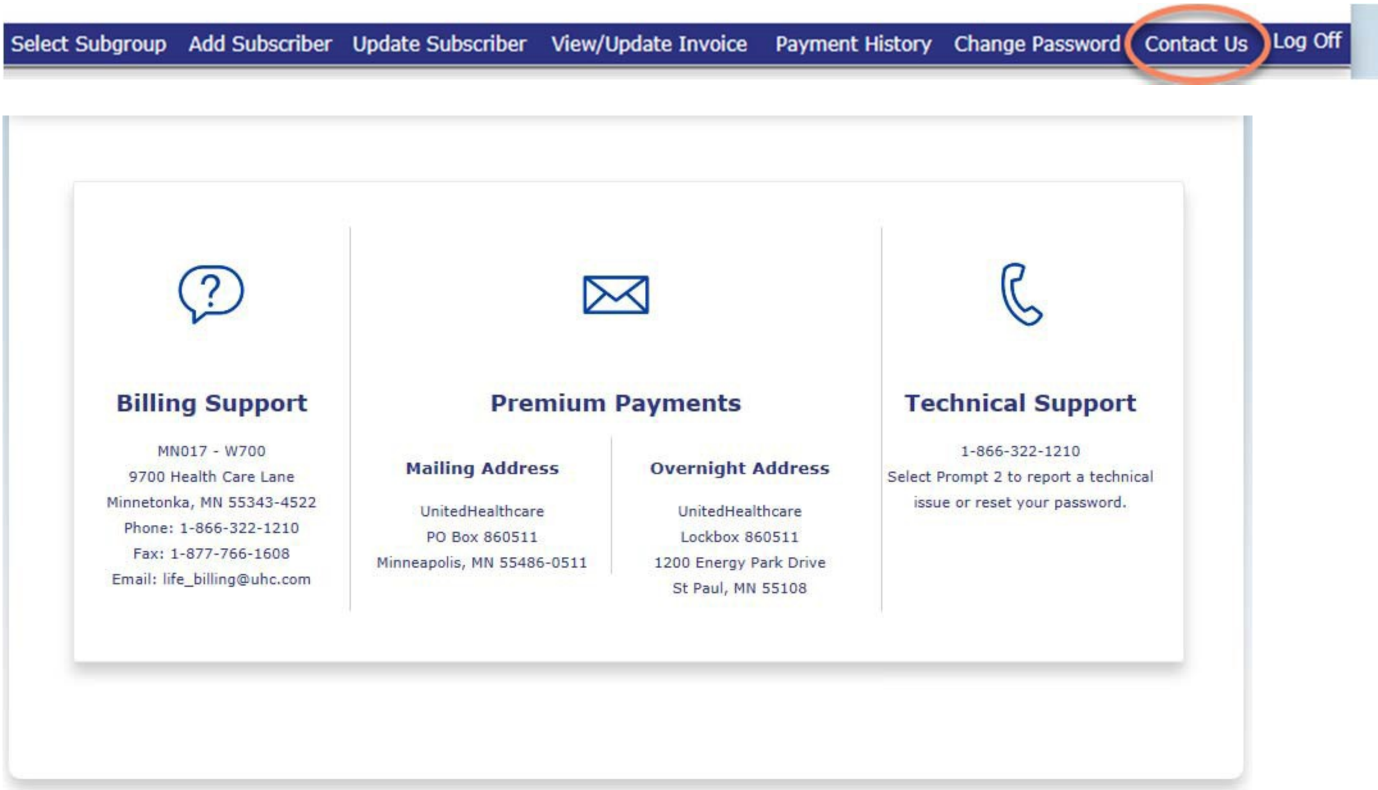
The following topics are included in this chapter:

Subgroup ID	Name	Select Subgroup
1001	[redacted]	Select

Open e-Bill Services

To open the **e-Bill Services** system please follows these steps:

1. Log into the *eAdministration* system by following the steps in **Chapter 1: System Overview, Section 2: Getting Started, Topic: Single Sign On Process**.
2. The HOME menu displays a list of menu options and applications.
3. Click on the **e-Bill Services** link.
4. The **SEARCH FOR SUBGROUPS** screen opens and displays a table listing the Subgroup ID and Name for each subgroup you assigned to your userid.
5. Click on the appropriate SUBGROUP ID or NAME link to open the e-Bill Services WELCOME screen. See below for an example of the Welcome screen.



Billing Support

MN017 - W700
9700 Health Care Lane
Minnetonka, MN 55343-4522
Phone: 1-866-322-1210
Fax: 1-877-766-1608
Email: life_billing@uhc.com

Premium Payments

Mailing Address

UnitedHealthcare
PO Box 860511
Minneapolis, MN 55486-0511

Overnight Address

UnitedHealthcare
Lockbox 860511
1200 Energy Park Drive
St Paul, MN 55108

Technical Support

1-866-322-1210
Select Prompt 2 to report a technical issue or reset your password.

Contact Us

To view contact information, please follow these steps:

1. Click on the **Contact Us** menu option at the top of the WELCOME screen.
2. The **Contact Us** screen opens and displays the following information:
   - Help Desk
   - Premium Mailing Address
   - Billing Department

Exit

To close out of the E-Bill Services system, please follow these steps:

1. Click on the **Log Off** menu option on the top of the Welcome screen.
2. The *eAdministration* Home page will display.
3. To exit out of the *eAdministration* system, click on the Log Out link on the menu list.

CHAPTER 3: LIST BILL E-BILL PROCESSING

PURPOSE

This chapter provides detailed information regarding on-line processing for List Billed groups.

UnitedHealthcare Specialty Benefits will set up your access level according to the current number of invoices sent out for your group. You may be set up on the group level, which gives you access to all subgroups within your group, or at the subgroup level, which gives you access to one or more subgroups within your group.

Example of Group & Subgroup hierarchy:

Group = ABC Company
Subgroup 1001 = ABC Company Miami, Florida
Subgroup 1002 = ABC Company New York, New York
Subgroup 1003 = ABC Company Los Angeles, California

BEFORE YOU BEGIN

Login to the e-Bill Services system by following the steps in **Chapter 2: E-Bill Services System, Section 1: Access e-Bill Services.**

IN THIS CHAPTER

The following sections are included in this chapter:

Section 1: Adding a New Subscriber

PURPOSE

This section provides detailed information regarding adding a new subscriber to a subgroup. The following screens must be completed through the e-Bill Services system in order to submit the new subscriber information to be included on an invoice:

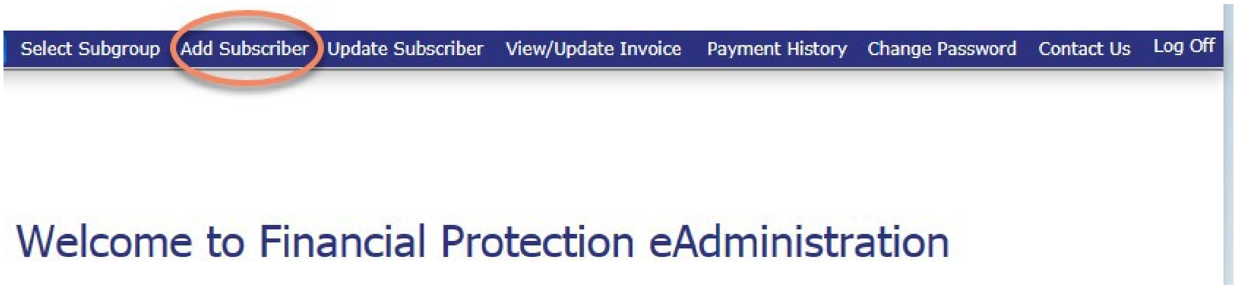
- Add Subscriber
- Address and Phone Information
- Add Eligibility
- The Add Dependent screen must be completed only if a dependent product is selected in the Add Eligibility screen.
- You must submit the new subscriber information on the Summary screen.

BEFORE YOU BEGIN

Login to the e-Bill Services system by following the steps in **Chapter 2: E-Bill Services System, Section 1: Access e-Bill Services**.

IN THIS SECTION

The following topics are included in this section:



Add Subscriber

Subscriber information must be added and updated at the subgroup level. It is your responsibility to add and/or update subscribers for all the subgroups that you administer.

To begin the **Add Subscriber** process, please follow these steps:

1. From the **Welcome to List Bill** screen, click on the **ADD SUBSCRIBER** menu option at the top of the screen.
2. The **Add Subscriber** screen opens. The Group and Subgroup ID and Name will be displayed on this screen

Important: All fields in the following screens with a **red** asterisk indicate required fields and must be completed before you can continue with the enrollment process.

You will be able to use the tab key to move to the next available field.

Reminder: By using this website you agree to our Internet Service Agreement. This is a private web site containing confidential information. Authorized site users must use this information for business purposes only. Any unauthorized use of the web site and/or the data contained on the site may be grounds for penalties, fines or criminal conviction.

Click on the Internet Service Agreement or Privacy Policy link on the screen to review.

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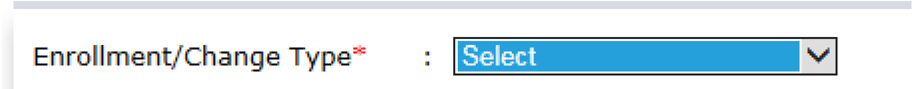
Add Subscriber (cont.)

3. Click on the down arrow in the Enrollment/Change Type field to open the drop-down menu list.



Enrollment/Change Type* : Select

4. Select one of the following options:

   Initial Enrollment – to indicate that this subscriber is an employee at the time the group policy was initiated.

   New Hire – to indicate that this subscriber was hired after the group policy was initiated.

5. Click on the down arrow in the “IS SUBSCRIBER A LATE ENTRANT?”field.

Is subscriber a late entrant? *: Select

6. Select one of the following options:

   Yes – to indicate that the subscriber is a late entrant and that the completed enrollment form was not received within the enrollment period.
   No – to indicate that the subscriber is not a late entrant and that the completed enrollment form was received within the enrollment period.

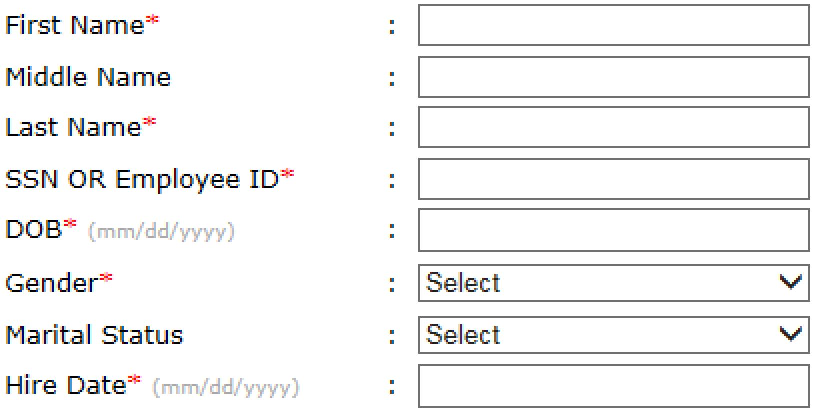
   Click on the question mark to see a definition of late entrant and when Evidence of Insurability is required.

Continued next page...

Add Subscriber (cont.)

Class* :

7. Click on the down arrow in the **CLASS** field and select the appropriate option for this subscriber by clicking on it. The options in the class field will be populated based on the group assigned to you and the subgroup selected previously. The **CLASS NAME** will display when an option is selected



First Name* :
Middle Name :
Last Name* :
SSN OR Employee ID* :
DOB* (mm/dd/yyyy) :
Gender* : Select
Marital Status : Select
Hire Date* (mm/dd/yyyy) :

8. Click on the **FIRST NAME** field and type in the subscriber's first name.
9. Use the **<Tab >** key or click on the **MI** field and type in the subscriber's middle initial, if necessary. This is an optional step as this field is not required.
10. Use the **<Tab >** key or click on the **LAST NAME** field and type in the subscriber's last name.
11. Use the **<Tab >** key or click on the **SSN OR EMPLOYEE ID** field to type in the subscriber's Social Security Number, if known, or employee ID number.

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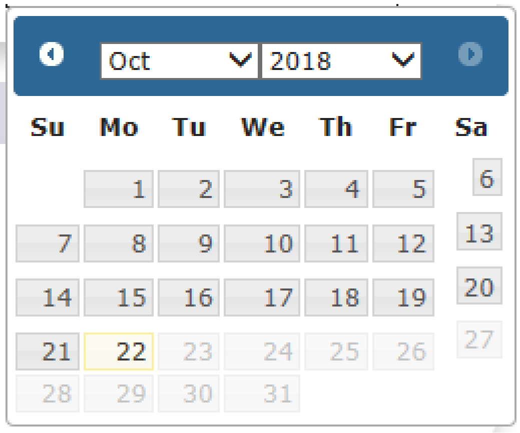
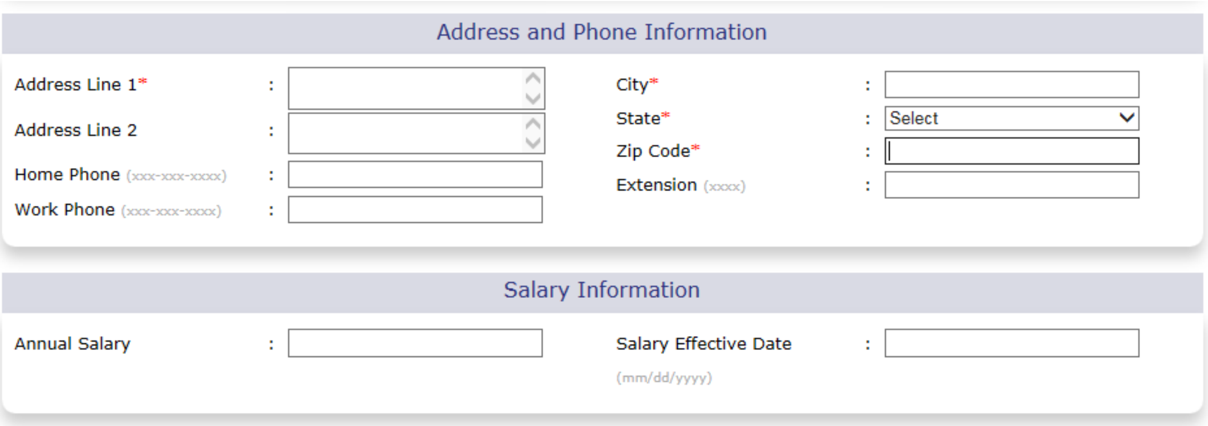
Add Subscriber (cont.)

12. Use the **<Tab >** key or click on the **DOB** field and type in the subscriber's date of birth using the following format: mm/dd/yyyy.
13. Use the **<Tab >** key or click on the **Gender** field. Type M for Male or F for Female.
14. Use the **<Tab >** key or click on the **Marital Status** field. Type in one of the following:
    - D for Divorced
    - M for Married
    - S for Single
    - W for Widow(er)
15. Or, click on the down arrow to open the drop-down menu and select one of the options. This is an optional step as this field is not required.
16. Use the **<Tab >** key or click on the Hire Date field. Type in the subscriber's actual hire date using the following format: mm/dd/yyyy.
17. Or, select the calendar icon 📅 to open the pop-up calendar.



18. Click **<Cancel >** at the bottom of the screen if you do not want to continue with the enrollment process. This action will clear out all previously entered information and return you to the Welcome to List Bill screen.
19. Click **<Next >** when all the required fields are completed.
20. The system will validate information entered in this screen. If validation fails, a list of incomplete or invalid fields will display in **red** text at the top of the screen.
21. Make any correction necessary, and then click on the **Next** button again.
22. When validation passes, the Address and Phone and Salary Information screen opens.



Address and Phone Information

To continue with the enrollment process, please follow these steps:

1. Click on the **Address Line 1** field and type in the subscriber's address.
2. Use the **<Tab >** key or click on the **Address Line 2** field and type in the subscriber's additional address information, if necessary. This field is optional and is not required.
3. Use the **<Tab >** key or click on the **City** field and type in the subscriber's city name.
4. Use the **<Tab >** key or click on the **State** field and type in the first letter of the two-character state abbreviation. Continue to select this letter key or the down arrow key until the correct two-character state abbreviation appears.

   For example: to select the MN state code, select the "M" key five times until "MN" appears in the field.
5. Or, select the down arrow in the State field to open the drop-down menu list. Scroll down the list to select the correct two-character state abbreviation.

Continued next page...

Address and Phone Information (cont.)

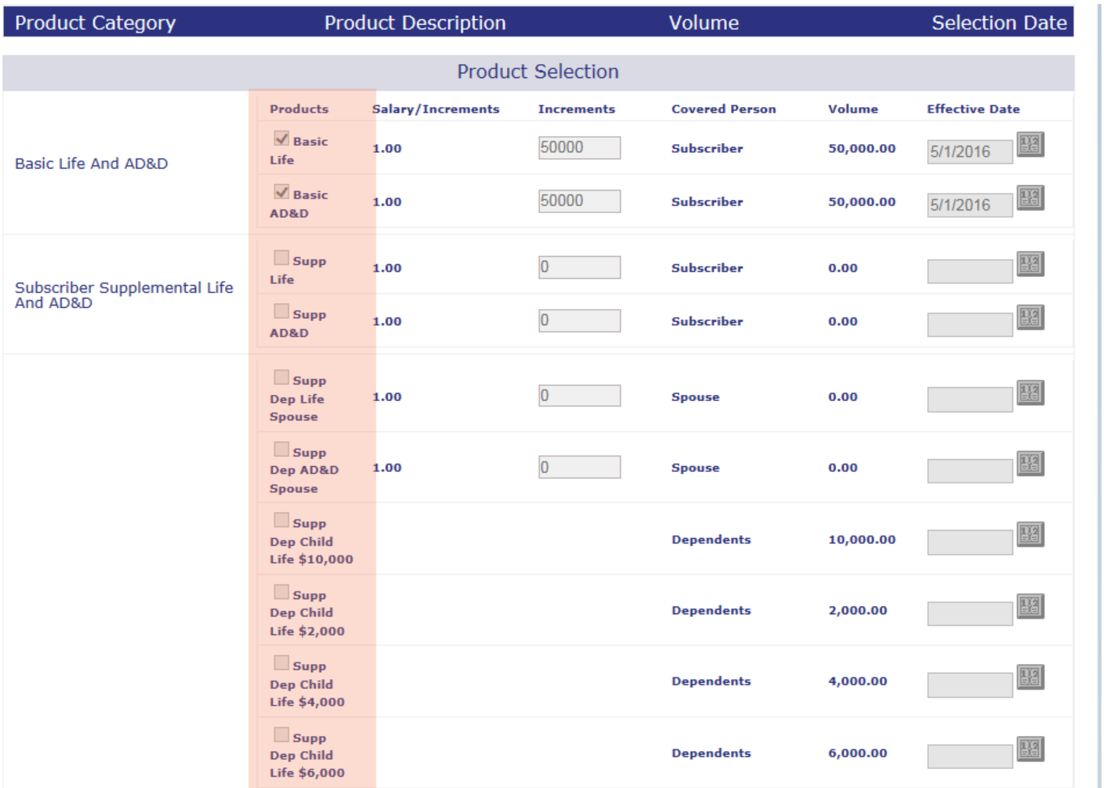
6. Use the **<Tab >** key or click on the **ZIP CODE** field and type in a valid zip code using the following format: either 99999 or 99999-0000.
7. Use the **<Tab >** key or click on the **HOME PHONE** field and type in a valid phone number using the following format: 999-999-9999. This field is optional as it is not a required field.
8. Use the **<Tab >** key or click on the **WORK PHONE** field and type in a valid phone number using the following format: 999-999-99999. This field is optional as it is not a required field.
9. Use the **<Tab >** key or click on the **EXTENSION** field and type in a valid work phone extension number using the following format: 9999. This field is optional as it is not a required field.
10. Use the **<Tab >** key or click on the **ANNUAL SALARY** field and type in a valid salary amount using the following format: 99999.99.

Note: This field is required if the subscriber has selected a salary-based product. Salary-based products are displayed on the ADD ELIGIBILITY screen.

11. Click on the **SALARY EFFECTIVE DATE** field and type in the appropriate date.
12. Or, click on the calendar icon and use the pop-up calendar to select the appropriate date.

Note: This field is required if an ANNUAL SALARY amount is entered.

13. Click **<Previous >** to return to the SUBSCRIBER INFORMATION screen.
14. Click **<Cancel >** at the bottom of the screen if you do not want to continue with the enrollment process. This action will clear out all previously entered information and return you to the WELCOME TO LIST BILL screen.
15. Click **<Next >** when all the required fields are completed.
16. The system will validate information entered in this screen. If validation fails, a list of incomplete or invalid fields will display in **red** text at the top of the screen.
17. Make any corrections necessary, and then click **<Next >** again to validate the information.
18. When validation passes, the ADD ELIGIBILITY screen opens.



Product Category	Product Description	Volume	Selection Date

Product Selection

	Products	Salary/Increments	Increments	Covered Person	Volume	Effective Date
Basic Life And AD&D	☑ Basic Life	1.00	50000	Subscriber	50,000.00	5/1/2016
	☑ Basic AD&D	1.00	50000	Subscriber	50,000.00	5/1/2016
Subscriber Supplemental Life And AD&D	☐ Supp Life	1.00	0	Subscriber	0.00	
	☐ Supp AD&D	1.00	0	Subscriber	0.00	
	☐ Supp Dep Life Spouse	1.00	0	Spouse	0.00	
	☐ Supp Dep AD&D Spouse	1.00	0	Spouse	0.00	
	☐ Supp Dep Child Life $10,000			Dependents	10,000.00	
	☐ Supp Dep Child Life $2,000			Dependents	2,000.00	
	☐ Supp Dep Child Life $4,000			Dependents	4,000.00	
	☐ Supp Dep Child Life $6,000			Dependents	6,000.00	

Add Eligibility

To **select products** for the new subscriber, please follow these steps:

1. Click on the box to the left of the product description to select the product. A checkmark will appear in the box to indicate the products have been selected.
2. The product **EFFECTIVE DATE** is pre-populated based on the ENROLLMENT/CHANGE TYPE selected and the HIRE DATE entered in the ADD SUBSCRIBER screen.
3. If a salary-based product has been selected and the ANNUAL SALARY amount has not been entered in the previous screen, the following message will appear:

   > You have selected salary-based products. Please go to the previous page and enter the salary amount.

4. Click **<Previous >** to return to the ADD SUBSCRIBER screen then click on the **Next** button to return to the ADDRESS & PHONE AND SALARY INFORMATION screen.
5. Click **<ANNUAL SALARY>** field and type in the subscriber's appropriate annual salary amount.
6. Use the **<Tab >** key or click on the **SALARY EFFECTIVE DATE** field and type in the appropriate date using the following format: mm/dd/yyyy.
7. Or, click on the pop-up calendar icon to use the calendar function.

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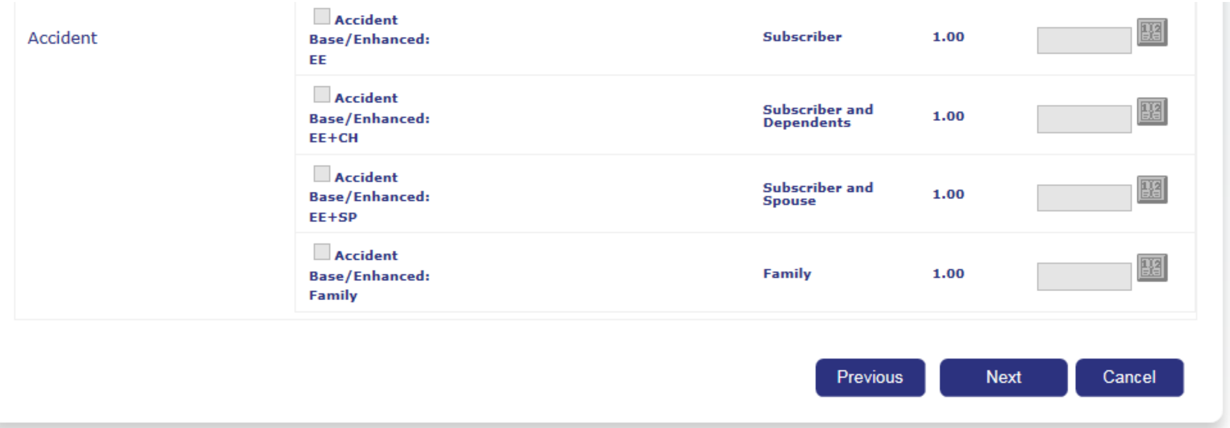
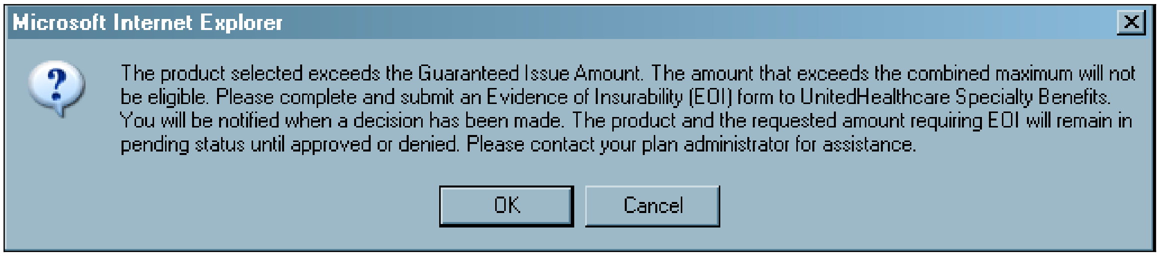


Accident	☐ Accident Base/Enhanced: EE	Subscriber	1.00	
	☐ Accident Base/Enhanced: EE+CH	Subscriber and Dependents	1.00	
	☐ Accident Base/Enhanced: EE+SP	Subscriber and Spouse	1.00	
	☐ Accident Base/Enhanced: Family	Family	1.00	

Add Eligibility (cont.)

8. Click **<Cancel >** at the bottom of the screen if you do not want to continue with the enrollment process. This action will clear out all previously entered information and return you to the Welcome to List Bill screen.
9. Click **<Next >** when all the required fields are completed.
10. The system will validate information entered in this screen. If validation fails, a list of incomplete or invalid fields will display in **red** text at the top of the screen.
11. Make any corrections necessary and click **<Next >** again to validate the information.
12. If an Evidence of Insurability (EOI) form is required, you may see an informational message similar to the following:



The product selected exceeds the Guaranteed Issue Amount. The amount that exceeds the combined maximum will not be eligible. Please complete and submit an Evidence of Insurability (EOI) form to UnitedHealthcare Specialty Benefits. You will be notified when a decision has been made. The product and the requested amount requiring EOI will remain in pending status until approved or denied. Please contact your plan administrator for assistance.

13. If you need assistance completing and submitting the EOI form, please contact your plan administrator.
14. When validation passes, and a dependent product has been selected the Add Dependent screen opens.

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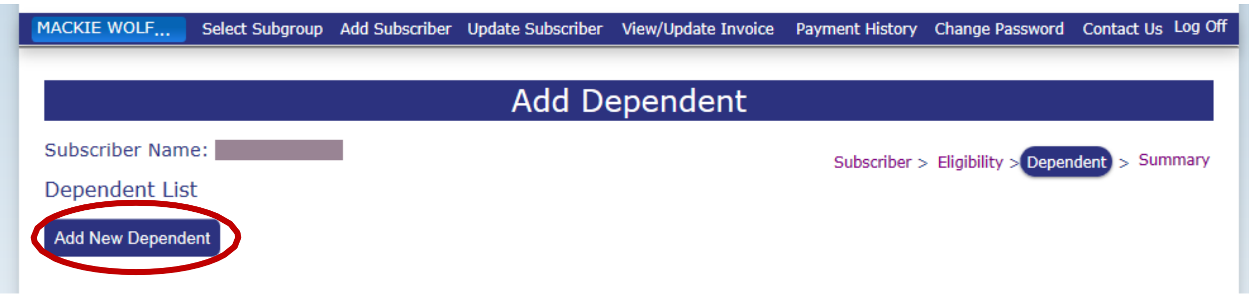
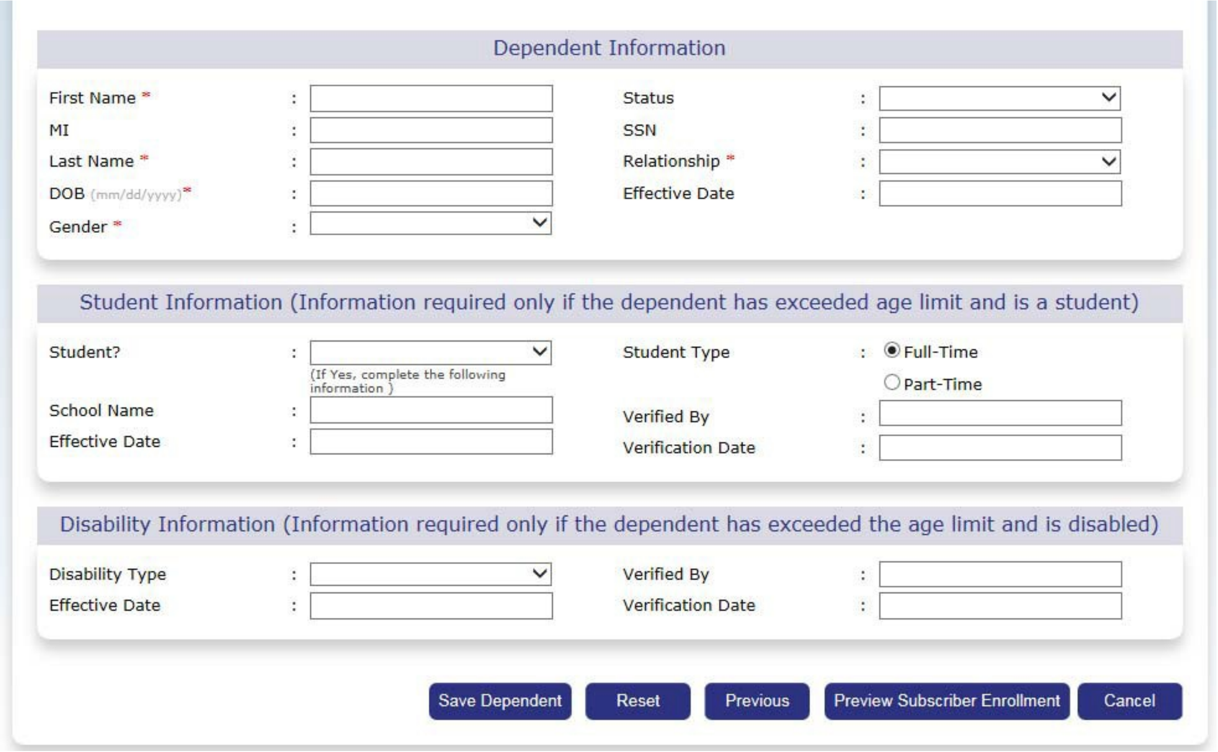
Add Dependent





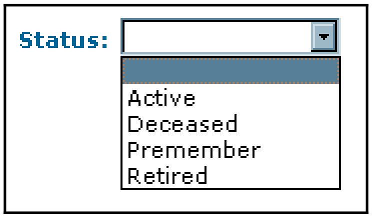
To **add a dependent** for the new subscriber, please follow these steps:

1. Click **<Add New Dependent>** to expand the screen and display the dependent fields.
2. Click on the **FIRST NAME** field and type in the dependent's first name.
3. Use the **<Tab >** key or click on the **MI** field and type in the dependent's middle initial, if necessary. This is an optional step as this field is not required.
4. Use the **<Tab >** key or click on the **LAST NAME** field and type in the dependent's last name.
5. Use the **<Tab >** key or click on the **DOB** field and type in the dependent's date of birth in the following format: mm/dd/yyyy.

Continued next page...

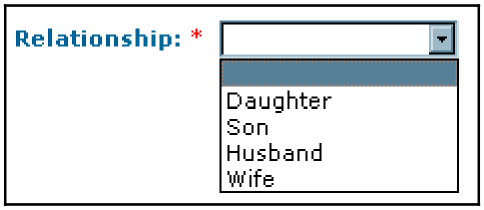
Add Dependent (cont.)

6. Use the **<Tab >** key or click on the **GENDER** field and type M for Male or F for Female.
7. Or, click on the down arrow to open the drop-down menu and select an option.
8. Click on the down arrow on the **STATUS** field to open the drop-down menu and select an option, if appropriate. This is an optional step as this field is not required.



9. Use the **<Tab >** key or click on the **SSN** field and type in the dependent's Social Security Number, if necessary. This is an optional step as this field is not required.

10. Click on the down arrow on the **RELATIONSHIP** field to open the drop-down menu and select an option.



11. Click on the **EFFECTIVE DATE** field and type in the appropriate date in the following format: mm/dd/yyyy. This is an optional step as this field is not required.
12. If the dependent child is not a student or disabled child over the age limit, click **<Add Dependent>** to add the dependent to the Dependent List section.
13. Click **<Reset >** to clear out the information entered in the previous steps.
14. Click **<Cancel >** if you do not want to continue with the enrollment process. This action will clear out all previously entered information and return you to the WELCOME TO LIST BILL screen.

Continued next page...

Add Dependent – Student

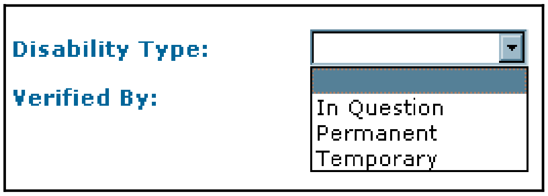
If the dependent child over the age limit and is a **student**, please follow these steps:

1. After completing Steps 1 through 11 above, click on the down arrow on the **STUDENT** field and select an option: Yes or No.
2. Use the **<Tab >** key or click on the **SCHOOL NAME** field and type in the name of the dependent's school.
3. Use the **<Tab >** key or click on the **EFFECTIVE DATE** field and type in the date the student began attending the school in the following format: mm/dd/yyyy.
4. Click on one of the radio buttons to indicate the **STUDENT TYPE**: Full-Time or Part-Time.
5. Click on the **VERIFIED BY** field and type in the full name of the person that verified the dependent child is a student.
6. Use the **<Tab >** key or click on the **VERIFICATION DATE** field and type in the date the student information was verified in the following format: mm/dd/yyyy.
7. Click **<Add Dependent>** to save the dependent child student information.
8. Click **<Reset>** button to clear the dependent child student information.
9. Click <**Cancel>** button to exit out of the Add Subscriber process.

Add Dependent – Disabled

If the dependent child is over the age limit and **disabled**, please follow these steps:

1. After completing the steps to add a dependent, click on the down arrow on the **DISABILITY TYPE** field to open the drop-down menu. Select one the appropriate option.



2. Use the **<Tab >** key or click on the **EFFECTIVE DATE** field and type in the appropriate date for the disability in the following format: mm/dd/yyyy.
3. Use the **<Tab >** key or click on the **VERIFIED BY** field and type in the full name of the person that verified the dependent child is disabled.
4. Use the **<Tab >** key or click on the **VERIFICATION DATE** field and type in the date the disability information was verified in the following format: mm/dd/yyyy.
5. Click **<Add Dependent>** to save the disability information for the dependent child.
6. Click **<Reset>** to clear the dependent child disability information.
7. Click **<Cancel >** to exit out of the ADD SUBSCRIBER process.

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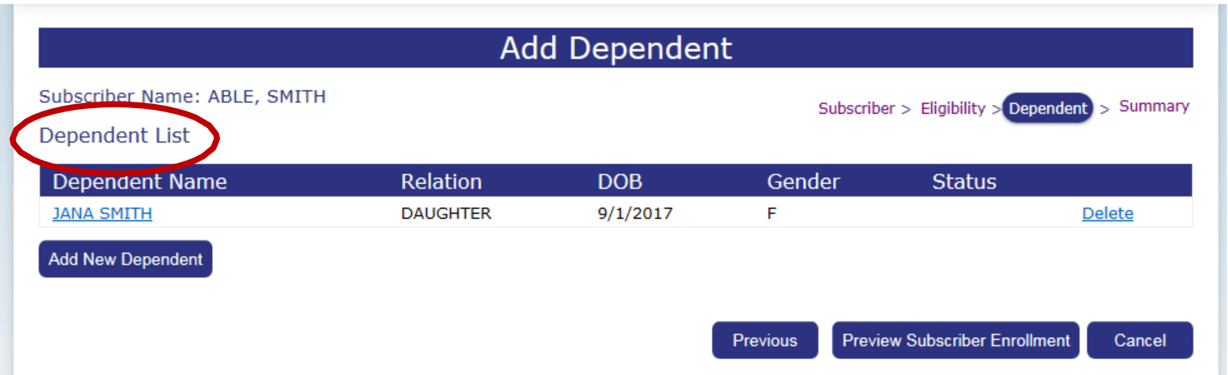


Subscriber Name: ABLE, SMITH

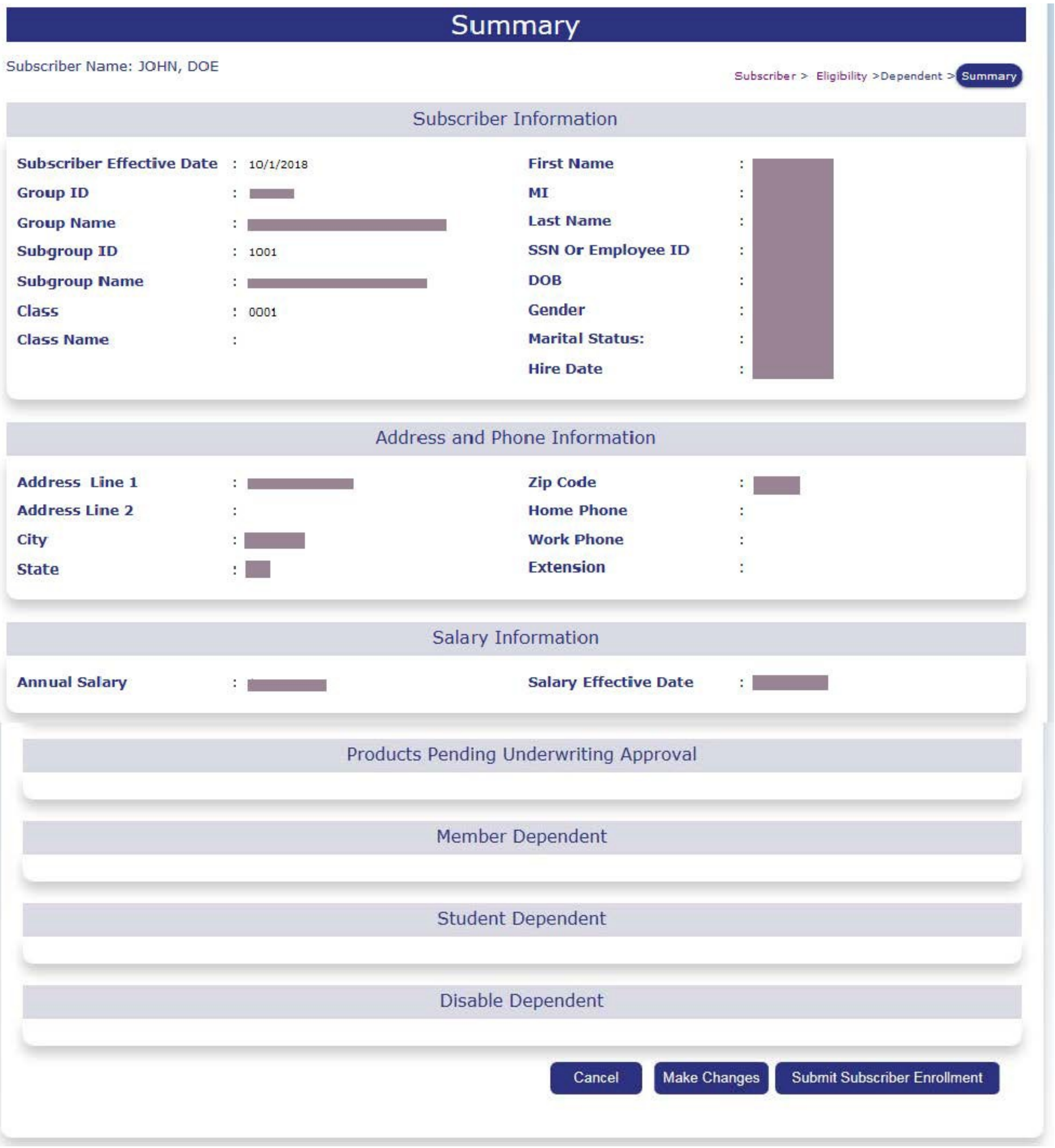
Dependent List

Dependent Name	Relation	DOB	Gender	Status	
JANA SMITH	DAUGHTER	9/1/2017	F		Delete

Dependent List

When the **Add new dependent** button has been selected and dependent information has been entered correctly, the **Dependent List** section will display on the screen.

When all appropriate dependents are entered, click **<Next >** to open the SUMMARY screen.



Summary

Subscriber Name: JOHN, DOE

Subscriber > Eligibility >Dependent > Summary

Subscriber Information

Subscriber Effective Date	: 10/1/2018	First Name	: [redacted]
Group ID	: [redacted]	MI	: [redacted]
Group Name	: [redacted]	Last Name	: [redacted]
Subgroup ID	: 1001	SSN Or Employee ID	: [redacted]
Subgroup Name	: [redacted]	DOB	: [redacted]
Class	: 0001	Gender	: [redacted]
Class Name	:	Marital Status:	: [redacted]
		Hire Date	: [redacted]

Address and Phone Information

Address Line 1	: [redacted]	Zip Code	: [redacted]
Address Line 2	:	Home Phone	:
City	: [redacted]	Work Phone	:
State	: [redacted]	Extension	:

Salary Information

Annual Salary	: [redacted]	Salary Effective Date	: [redacted]

Products Pending Underwriting Approval

Member Dependent

Student Dependent

Disable Dependent

Continued next page

Summary

To **complete the enrollment** process, please follow these steps:

1. Review the information on the SUMMARY screen to verify the subscriber and dependent (if necessary) is entered correctly.
2. Select the appropriate breadcrumb link at the top right-hand side of the screen to open the screen to make corrections.
3. To make corrections to the SUBSCRIBER INFORMATION, ADDRESS AND PHONE INFORMATION and/or SALARY INFORMATION, click on the **Subscriber** breadcrumb link.
4. The ADD SUBSCRIBER screen opens.
5. Make corrections to the subscriber information, and then select the **Next** button to open the ADDRESS AND PHONE INFORMATION and SALARY INFORMATION screen.
6. Make any necessary corrections to the subscriber's address and/or salary information.
7. To open the ADD ELIGIBILITY screen, click on the **Eligibility** breadcrumb link or click **<Next >** from the ADDRESS AND PHONE INFORMATION screen.
8. Make any necessary corrections to the product selections.
9. To open the ADD DEPENDENT screen click on the **Dependent** breadcrumb link, or click **<Next >** from the ADD ELIGIBILITY screen.
10. Make any necessary corrections to the dependent information.

Note: The Dependent link will not be available for selection if a dependent product was not selected in the ADD ELIGIBILITY screen.

11. To return to the SUMMARY screen click on the **Summary** breadcrumb link, or click **<Next >** from the ADD ELIGIBILITY or ADD DEPENDENT screen.
12. After reviewing the SUMMARY screen and all information is correct, click **<Submit Request>** to finalize the ADD SUBSCRIBER process.

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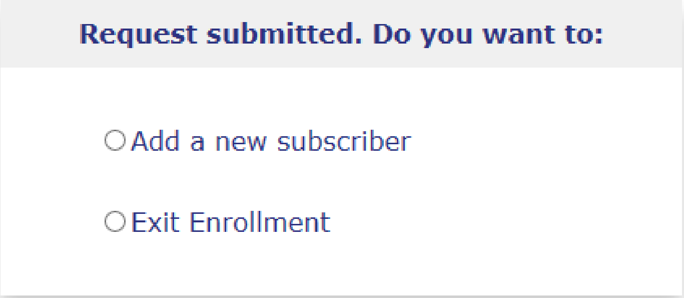
Summary (cont.)



Request submitted. Do you want to:

○ Add a new subscriber

○ Exit Enrollment

13. A confirmation window will open.
14. Select one of the following options by clicking on the radio button:
    - Add a new subscriber to open the Add Subscriber screen
    - Exit Enrollment to open the Welcome to List Bill screen

Note: The e-Bill system will display new subscriber information in approximately 5 minutes after the information has been submitted.

The new subscriber will not display on an invoice until the following business day.

Section 2: Reviewing Existing Subscribers

PURPOSE

This section provides detailed information regarding how to review information for existing subscribers for your subgroup.

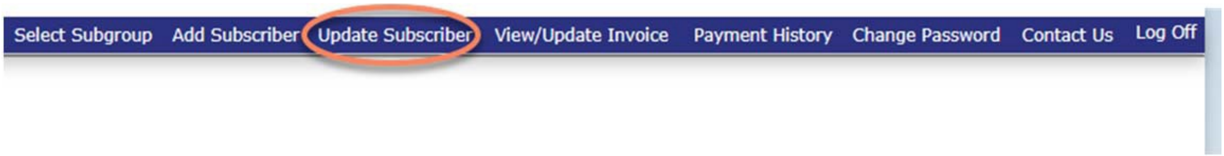
To view summary information for a specific subscriber, you must first select a subscriber from the Search for Subscribe list.

BEFORE YOU BEGIN

Login to the e-Bill Services system by following the steps in **Chapter 2: E-Bill Services System, Section 1: Access e-Bill Services.**

IN THIS SECTION

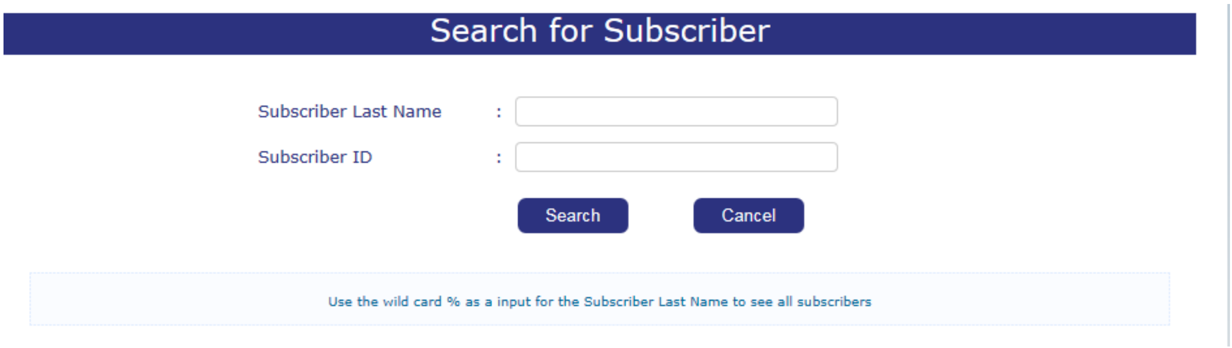
The following topics are included in this section:



Search for Subscriber

To review subscriber summary information, you must first identify an existing subscriber. To identify a specific subscriber, please follow these steps:

1. From the WELCOME TO LIST BILL screen, click on the **Update Subscriber** menu option at the top of the screen.
2. The **Search for Subscriber** screen will open.



Use the wild card % as a input for the Subscriber Last Name to see all subscribers

3. Click on the SUBSCRIBER LAST NAME or SUBSCRIBER ID field and type in full or partial information and click on the **Search** button.
4. A list of subscribers will display based on the search criteria entered.

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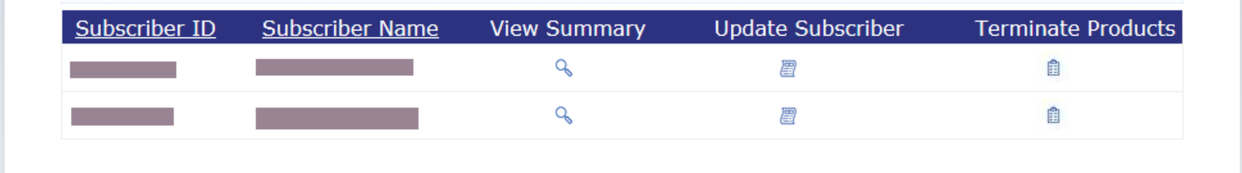

Subscriber ID	Subscriber Name	View Summary	Update Subscriber	Terminate Products
[redacted]	[redacted]	🔍	📝	📋
[redacted]	[redacted]	🔍	📝	📋

View Summary

1. Click on the **View Summary** icon to open the SUMMARY screen for that subscriber.
2. You will only be able to view the subscriber information.
3. This information will display as it did on the SUMMARY screen when you performed the **Add Subscriber** process.

Section 3: Updating Existing Subscribers

PURPOSE

This section provides detailed information regarding how to update existing subscriber information for your subgroup.

The following updates can be made to an existing subscriber through the e-Bill Services system.

- Address Changes
- Salary Changes
- Qualifying Life Status Change
- Update Dependent Information
- Cancel Voluntary Products

BEFORE YOU BEGIN

Login to the e-Bill Service WELCOME TO LIST BILL screen.

IN THIS SECTION

The following topics are included in this section:

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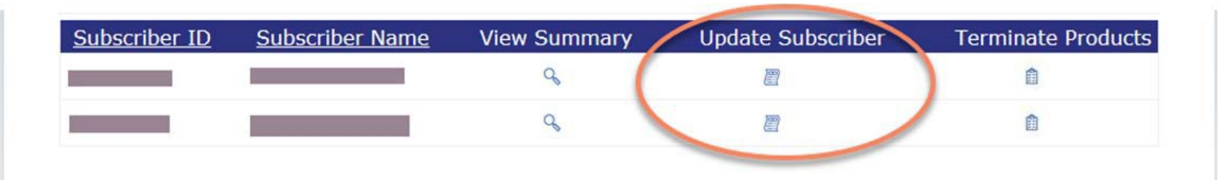
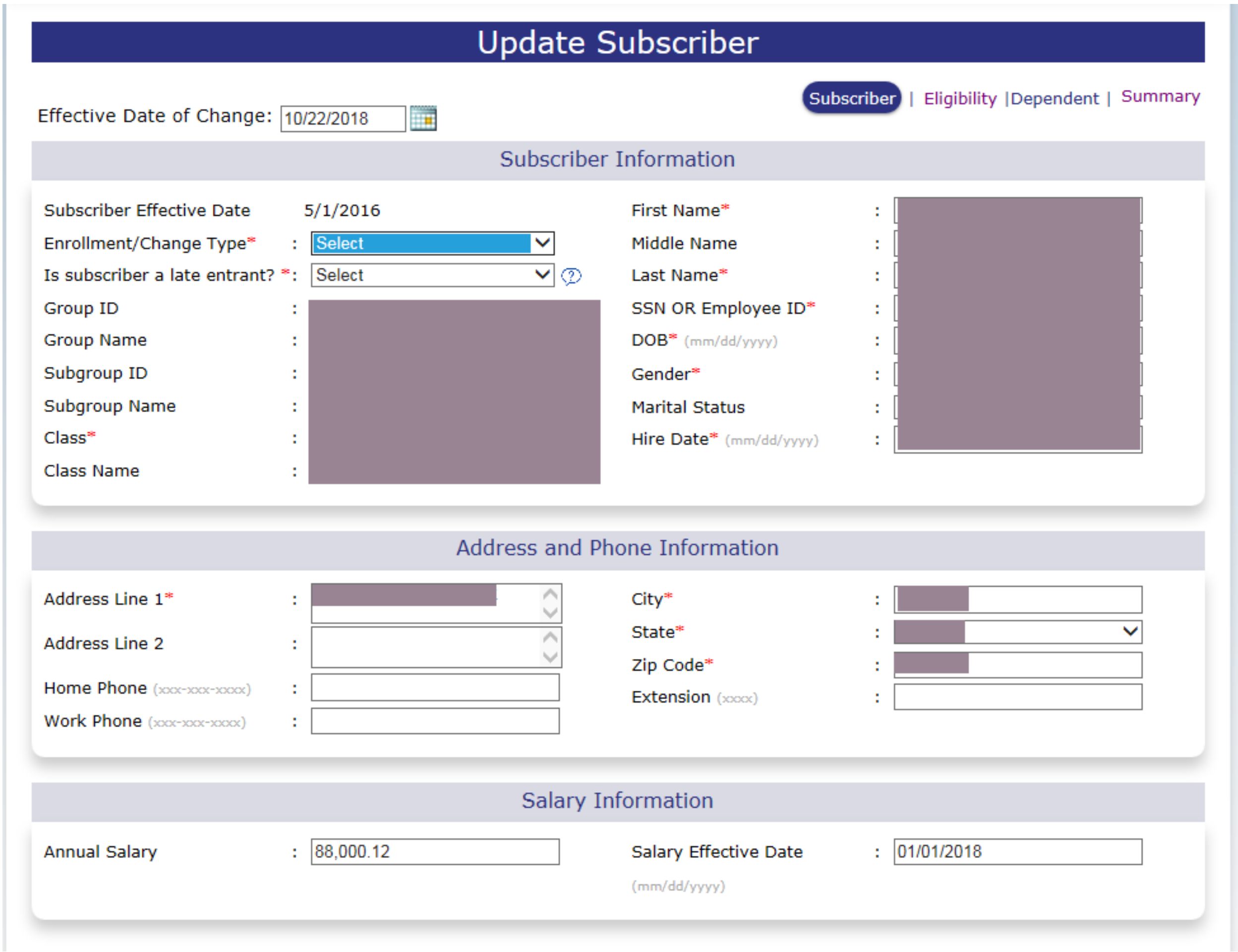


Subscriber ID	Subscriber Name	View Summary	Update Subscriber	Terminate Products
[redacted]	[redacted]	🔍	✎	🗑
[redacted]	[redacted]	🔍	✎	🗑

Update Subscriber

To **open the UPDATE SUBSCRIBER** screen, please follow these steps:

1. Click on the **Update Subscriber** menu option on the WELCOME TO LIST BILL screen.
2. The SEARCH FOR SUBSCRIBER screen opens.
3. Click on the SUBSCRIBER LAST NAME or SUBSCRIBER ID field and type in the full or partial information and click **<Search >**.
4. From the list of subscribers, click on the **Update Subscriber** icon for the appropriate subscriber.
5. The UPDATE SUBSCRIBER screen opens.



Effective Date of Change: 10/22/2018

Subscriber Information

Subscriber Effective Date 5/1/2016
Enrollment/Change Type* : Select
Is subscriber a late entrant? * : Select
Group ID : [redacted]
Group Name :
Subgroup ID :
Subgroup Name :
Class* :
Class Name :

First Name* : [redacted]
Middle Name :
Last Name* :
SSN OR Employee ID* :
DOB* (mm/dd/yyyy) :
Gender* :
Marital Status :
Hire Date* (mm/dd/yyyy) :

Address and Phone Information

Address Line 1* : [redacted]
Address Line 2 :
Home Phone (xxx-xxx-xxxx) :
Work Phone (xxx-xxx-xxxx) :

City* : [redacted]
State* : [redacted]
Zip Code* : [redacted]
Extension (xxxx) :

Salary Information

Annual Salary : 88,000.12
Salary Effective Date (mm/dd/yyyy) : 01/01/2018

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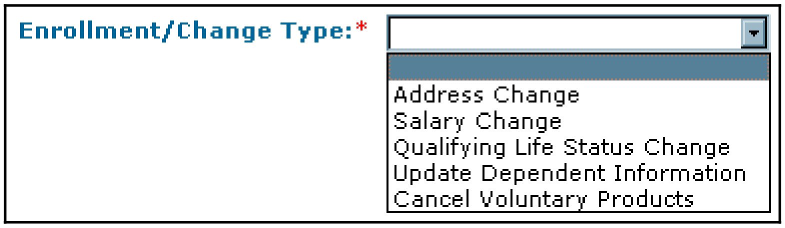
Update Subscriber – Address/Salary Changes

To make **Address or Salary changes** for a subscriber, please follow these steps:

1. Follow the steps defined previously to open the **Update Subscriber** screen for a specific subscriber.
2. Click on the down arrow on the ENROLLMENT/CHANGE TYPE field screen to open the drop-down menu.



3. Select one of the Enrollment/Change Type options:
   - **Address Change** to only change the subscriber's address or phone information. You will not be able to update products using this option.
   - **Salary Change** to only change the subscriber's Annual Salary and/or Salary Effective Date. You will not be able to update products using this option.
4. Click on the late entrant field and indicate whether the information change is for a late entrant.
5. Click **<Next >** to open the ADDRESS AND PHONE INFORMATION AND SALARY INFORMATION screen.

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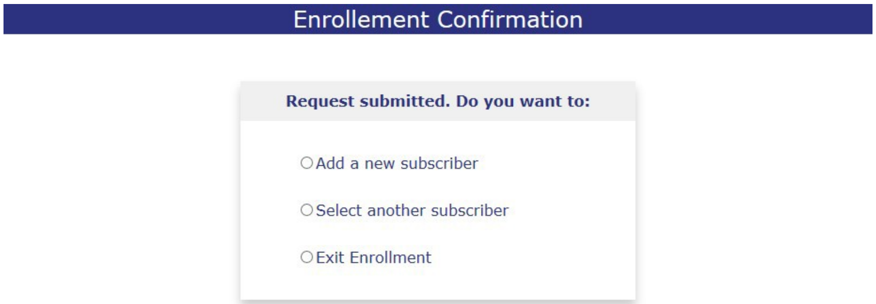
Update Subscriber – Address/Salary Changes (cont.)

6. Make any changes necessary, and then click **<Next >**.
7. The UPDATE ELIGIBILITY screen opens. You will not be able to make any changes in the product selections.
8. Click **<Next >** on the UPDATE ELIGIBILITY screen.
9. If the subscriber has previously selected a dependent product, the UPDATE DEPENDENT screen opens.
10. If the UPDATE DEPENDENT screen opens, click **<Next >** to open the SUMMARY screen.
11. If the subscriber has not previously selected a dependent product, the SUMMARY screen will display.
12. Verify the correct information has been entered.
13. Click **<Cancel >** to close the SUMMARY screen without saving any changes made during the update process.
14. Click **<Submit Request>** to save the changes made and close the SUMMARY screen.
15. When the changes have been submitted, the confirmation window opens:



Enrollement Confirmation

Request submitted. Do you want to:

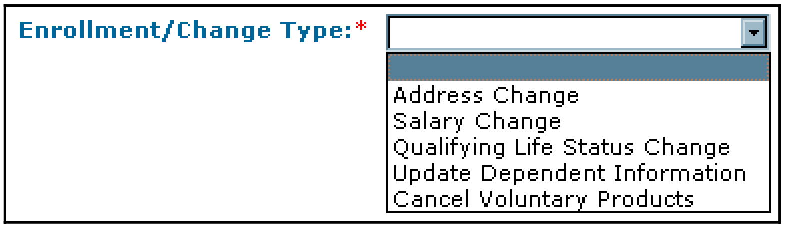
16. Select the appropriate radio button.
    - Add a new subscriber to open the ADD SUBSCRIBER screen.
    - Select another subscriber to open the SEARCH FOR SUBSCRIBER screen.
    - Exit Enrollment to open the WELCOME TO LIST BILL screen.

Update Subscriber – Qualifying Life Status Change

To make a **Qualifying Life Status Change**, please follow these steps:

Note: Qualifying Life Status Changes include selecting new dependent products and adding new dependents due to marriage, divorce or birth/adoption of a child.

1. Follow the steps defined previously to open the UPDATE SUBSCRIBER screen for a specific subscriber.
2. Select the **Qualifying Life Status Change** option from the ENROLLMENT/CHANGE TYPE field.



3. Answer the late entrant question to indicate whether the changes are for a late entrant.
4. Make any appropriate name changes, if necessary.
5. Click **<Next >** to open the ADDRESS AND PHONE INFORMATION AND SALARY INFORMATION screen.
6. Click **<Next >** to open the UPDATE ELIGIBILITY screen.
7. Select any of the appropriate dependent products, if necessary.
8. Click **<Next >** to open the UPDATE DEPENDENT screen if at least one dependent product has been selected.
9. Follow the steps defined in the enrollment process to **add a dependent**.
10. Click **<Next >** to open the SUMMARY screen.
11. Verify the information is correct on the SUMMARY screen.
12. Click **<Cancel >** to close the SUMMARY screen without saving any changes.
13. Click **<Submit Request>** button to save all the changes made during the update subscriber process.

Update Subscriber – Add Dependent

To **add new dependent information**, please follow these steps:

1. Follow the steps defined previously to open the UPDATE SUBSCRIBER screen for a specific subscriber.
2. Select the **Update Dependent Information** option from the ENROLLMENT/CHANGE TYPE field.
3. Answer the late entrant question to indicate whether or not the changes are for a late entrant.
4. Click **<Next >** to open the ADDRESS AND PHONE INFORMATION AND SALARY INFORMATION screen.
5. Click **<Next >** to open the UPDATE ELIGIBILITY screen.
6. Click **<Next >**to open the UPDATE DEPENDENT screen.
7. Follow the steps previously defined in the enrollment process to **add a dependent**.
8. Click **<Next >** to open the SUMMARY screen.
9. Verify the information is correct on the SUMMARY screen.
10. Click **<Cancel >** to close the SUMMARY screen without saving any changes.
11. Click **<Submit Request>** button to save all the changes made during the update subscriber process.

Update Subscriber – Update Dependent

To **update dependent information**, please follow these steps:

1. Follow the steps defined previously to open the UPDATE SUBSCRIBER screen for a specific subscriber.
2. Select the **Update Dependent Information** option from the ENROLLMENT/CHANGE TYPE field.
3. Answer the late entrant question to indicate whether or not the changes are fora late entrant.
4. Click **<Next>** to open the Address and Phone Information and Salary Information screen.
5. Click **<Next>** to open the UPDATE ELIGIBILITY screen.
6. Click **<Next>** to open the UPDATE DEPENDENT screen.
7. Click on the DEPENDENT NAME link to expand the **Update Dependent** screen and display the existing information for the specified dependent.
8. Click on the appropriate field and type in the correct information for the existing dependent.
9. Click **<Next>** to open the SUMMARY screen.
10. Verify the information is correct on the SUMMARY screen.
11. Click **<Cancel >** to close the SUMMARY screen without saving any changes.
12. Click **<Submit Request>** to save all the changes made during the update subscriber process.

Update Eligibility

Subscriber Name: [redacted]

Current Products

Product Category	Product Description	Volume	Effective Date	Terminate?	Termination Date
Life - Basic	Basic Life	50,000.00	3/1/2018	☐	
Life - AD&D	Basic AD&D	50,000.00	3/1/2018	☐	
Critical Illness	Critical Illness: EE Non-Tobacco	5,000.00	3/1/2018	☐	
Hospital Indemnity Product	Hospital Indemnity Base: EE Option A	1.00	3/1/2018	☐	
Accident Base	Accident Base: EE	1.00	3/1/2018	☐	

Update Subscriber – Cancel Voluntary Products

To **cancel** one or more **voluntary products** for a subscriber, please follow these steps:

1. Follow the steps previously defined to open the UPDATE SUBSCRIBER screen for a specific subscriber.
2. Select the **Cancel Voluntary Products** option from the ENROLLMENT/CHANGE TYPE field.
3. Answer the late entrant question to indicate whether or not the changes are fora late entrant.
4. Click **<Next>** to open the Address and Phone Information and Salary Information screen.
5. Click **<Next>** to open the UPDATE ELIGIBILITY screen.
6. Click on the checkbox in the TERMINATE column for each product to be terminated. A checkmark will appear in the checkbox.
7. Click on the TERMINATION DATE field and type in the appropriate date using the following format: mm/dd/yyyy. Or, use the pop-up calendar function.
8. Click **<Next>** to open the UPDATE DEPENDENT or SUMMARY screen.
9. If the UPDATE DEPENDENT screen opens, Click **<Next>** to open the SUMMARY screen.
10. Verify the information is correct on the SUMMARY screen.
11. Click **<Cancel >** to close the SUMMARY screen without saving anychanges.
12. Click **<Submit Request>** button to save all the changes made during theupdate subscriber process.

Section 4: Terminating a Subscriber

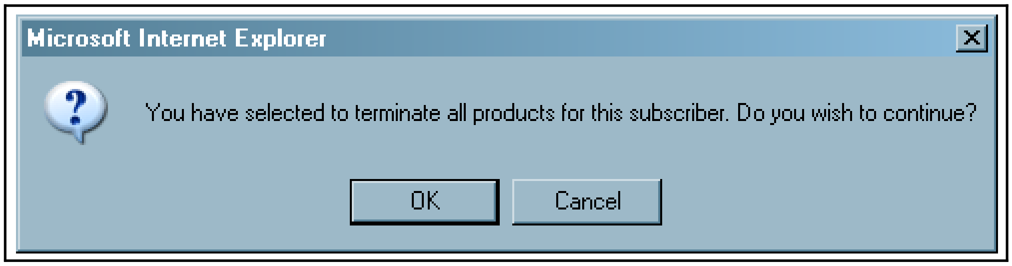
Terminate Subscriber

To terminate a subscriber, all the products previously selected for that subscriber must be cancelled.

To cancel all the subscriber's products, please follow these steps:

1. Select the **Update Subscriber** menu option at the top of the WELCOME TO LIST BILL screen.
2. The SEARCH FOR SUBSCRIBER screen opens.
3. Follow the steps to search for a specific subscriber to display the Subscriber Listing.
4. Click on the TERMINATE PRODUCTS icon for the appropriate subscriber.
5. The TERMINATE SUBSCRIBER screen opens.

6. Click on the PLEASE ENTER TERMINATION DATE field and type in the appropriate date using the following format: mm/dd/yyyy. Or, use the pop-up calendar function.
7. Click **<Cancel >** to close the screen without terminating the products.
8. Click **<Terminate >** to terminate all the products associated with the subscriber.
9. The termination confirmation window opens:



You have selected to terminate all products for this subscriber. Do you wish to continue?

10. Click **<Cancel >** to close the confirmation window and return to the TERMINATE SUBSCRIBER screen.
11. Click **<OK >** to continue with the termination process and return to the SEARCH FOR SUBSCRIBER screen.

Section 5: View/Update Invoice

PURPOSE

This section provides detailed information on how to:

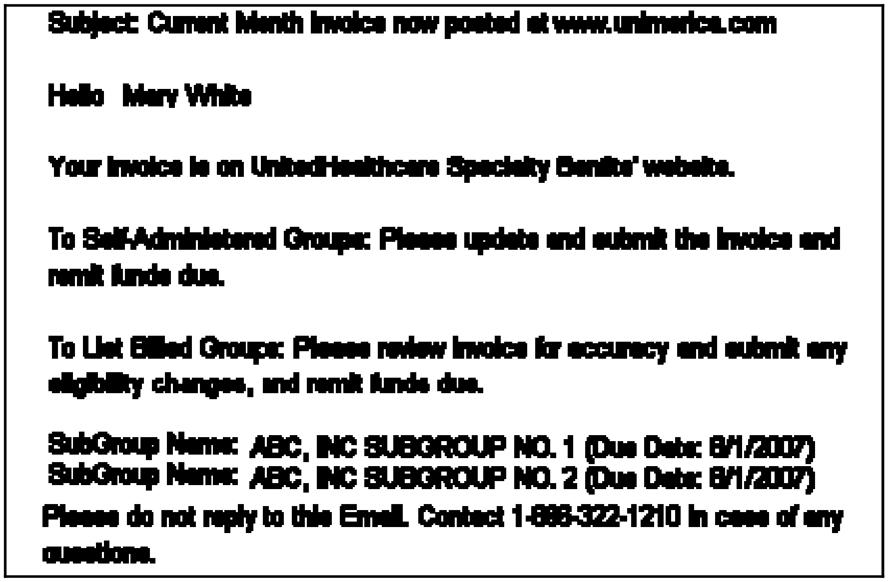
- View the current or an historical invoice
- Add or update subscribers for a current invoice
- Submit a request to rebill a current invoice
- Download a current or historical invoice to Microsoft Excel

You will receive an e-mail from UnitedHealthcare Specialty Benefits usually on the first business day after the 15th of each month stating that the latest invoice, including all subgroup information, is ready for your review and update. At that time you will be able to retrieve that invoice using the e-Bill Services system.

If you do not receive an invoice on the first business day after the 15th of the month, please wait at least until the 19th of the month before contacting UnitedHealthcare Specialty Benefits billing department at 1-866-322-1210. At the prompt, select #1 for billing issues.

Note: Certain email settings may prevent the billing notification email from being delivered to your inbox. To be confident the email will be received, add the UnitedHealthcare Specialty Benefits email address to your email address box; UnimericaOnline@uhc.com

Below is a sample of the billing notification email:



Subject: Current Month Invoice now posted at www.unimerica.com

Hello Mary White

Your invoice is on UnitedHealthcare Specialty Benfits' website.

To Self-Administered Groups: Please update and submit the invoice and remit funds due.

To List Billed Groups: Please review invoice for accuracy and submit any eligibility changes, and remit funds due.

SubGroup Name: ABC, INC SUBGROUP NO. 1 (Due Date: 8/1/2007)
SubGroup Name: ABC, INC SUBGROUP NO. 2 (Due Date: 8/1/2007)

Please do not reply to this Email. Contact 1-866-322-1210 in case of any questions.

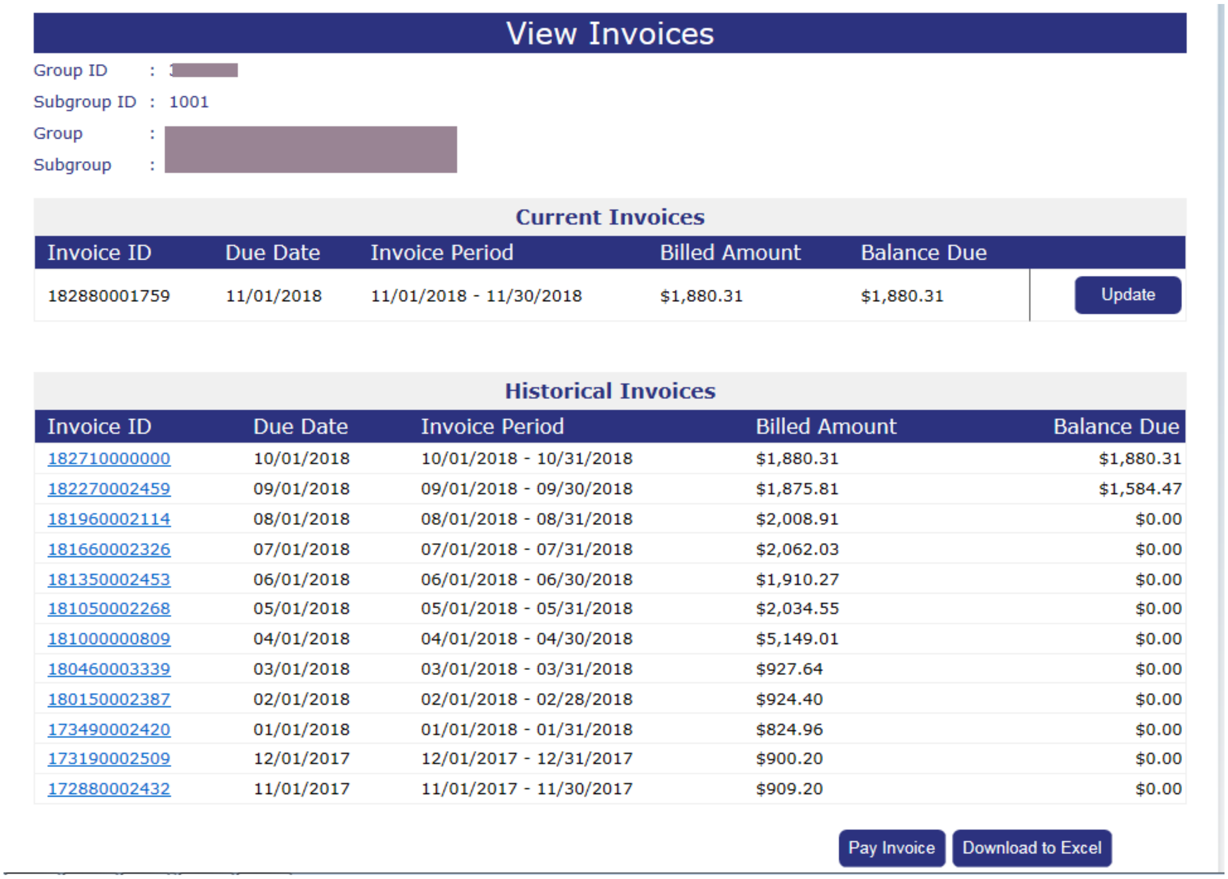
BEFORE YOU BEGIN

Login to the e-Bill Services WELCOME TO LIST BILL screen.

IN THIS SECTION

The following topics are included in this section:

View Invoice Listing



View Invoices

Group ID : [redacted]
Subgroup ID : 1001
Group : [redacted]
Subgroup :

Current Invoices

Invoice ID	Due Date	Invoice Period	Billed Amount	Balance Due	
182880001759	11/01/2018	11/01/2018 - 11/30/2018	$1,880.31	$1,880.31	Update

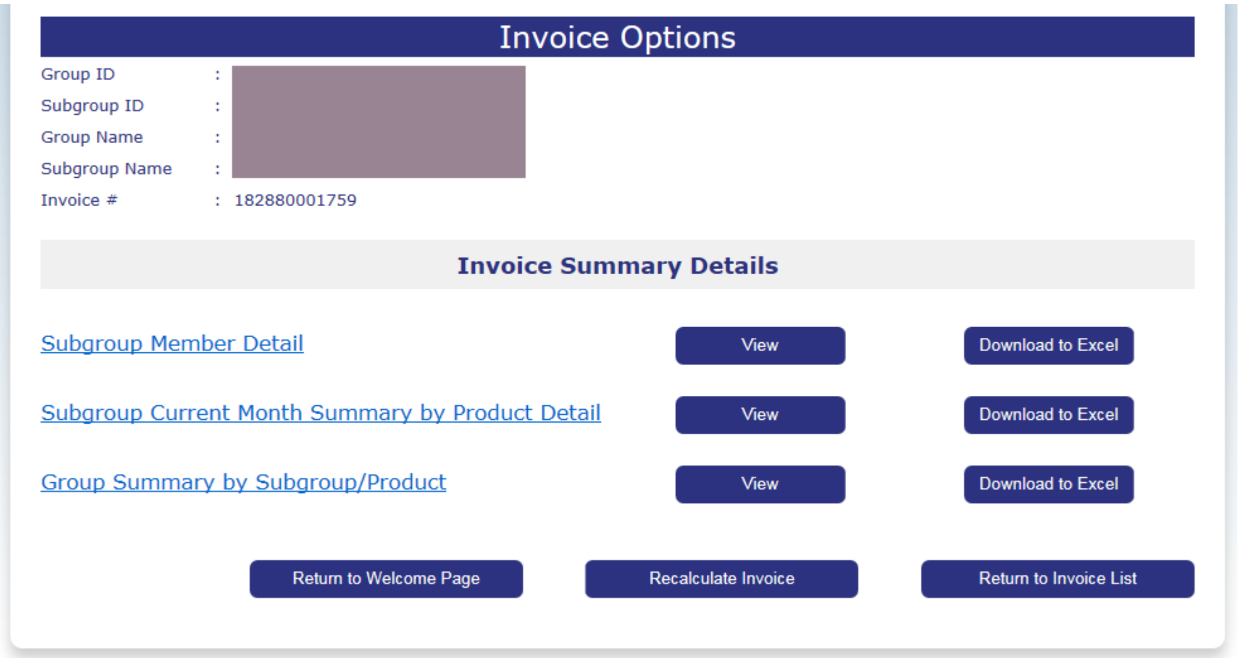
Historical Invoices

Invoice ID	Due Date	Invoice Period	Billed Amount	Balance Due
182710000000	10/01/2018	10/01/2018 - 10/31/2018	$1,880.31	$1,880.31
182270002459	09/01/2018	09/01/2018 - 09/30/2018	$1,875.81	$1,584.47
181960002114	08/01/2018	08/01/2018 - 08/31/2018	$2,008.91	$0.00
181660002326	07/01/2018	07/01/2018 - 07/31/2018	$2,062.03	$0.00
181350002453	06/01/2018	06/01/2018 - 06/30/2018	$1,910.27	$0.00
181050002268	05/01/2018	05/01/2018 - 05/31/2018	$2,034.55	$0.00
181000000809	04/01/2018	04/01/2018 - 04/30/2018	$5,149.01	$0.00
180460003339	03/01/2018	03/01/2018 - 03/31/2018	$927.64	$0.00
180150002387	02/01/2018	02/01/2018 - 02/28/2018	$924.40	$0.00
173490002420	01/01/2018	01/01/2018 - 01/31/2018	$824.96	$0.00
173190002509	12/01/2017	12/01/2017 - 12/31/2017	$900.20	$0.00
172880002432	11/01/2017	11/01/2017 - 11/30/2017	$909.20	$0.00

To view a current or historical invoice, please follow these steps:

1. Select the **View/Update Invoice** menu option from the Welcome to List Bill screen. (If your menu option is **View Invoice**, you do not have the correct user access to perform the update invoice function.)
2. The View Invoices screen opens.
3. Click on the Update Instructions link at the bottom of the screen to view a listing of update instructions, if necessary.
4. The most recent invoice will display under the Current Invoice section of the screen and all other invoices for the last 12 months will display under the Historical Invoices section.
5. Click **<Update >** for the current invoice or the Invoice ID of an historical invoice.
6. The Invoice Options screen opens and displays the Group and Subgroup Name and ID and the Invoice ID number.

Continued next page...



Group ID : [redacted]
Subgroup ID :
Group Name :
Subgroup Name :
Invoice # : 182880001759

Invoice Options

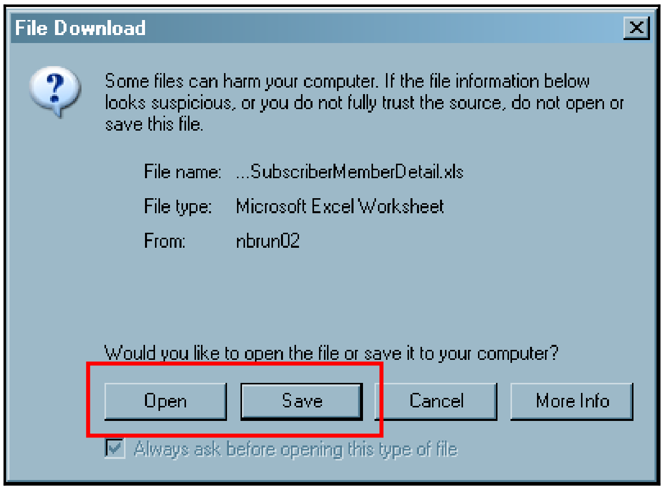
From the Invoice Options screen you will be able to:

- Verify Group, Subgroup and Invoice ID information
- View the Subgroup Member Detail of an invoice by selecting the **Download to Excel** button
- View or download to Microsoft Excel the Subgroup Current Month Summary by Product Detail or Subgroup Summary by Class/Product reports.
- If you have Group level access, you will also be able to view or download to Microsoft Excel the Group Summary by Subgroup/Product report.
- View specific subscriber details on an invoice
- Rebill a current invoice after subscribers have been added or updated.

Review Current Invoice

To review the subgroup member details for the most current invoice, please follow these steps:

1. Click on the **View/Update Invoice** menu option at the top of the Welcome to List Bill screen to open the View Invoices screen.
2. Click **<Update >** next to the current invoice to open the INVOICE OPTIONS screen.
3. Click **<Download to Excel >** to the right of the **Subscriber Member Detail** option to open the current invoice detail information into a Microsoft Excel spreadsheet.
4. The **File Download** window appears:



File Download

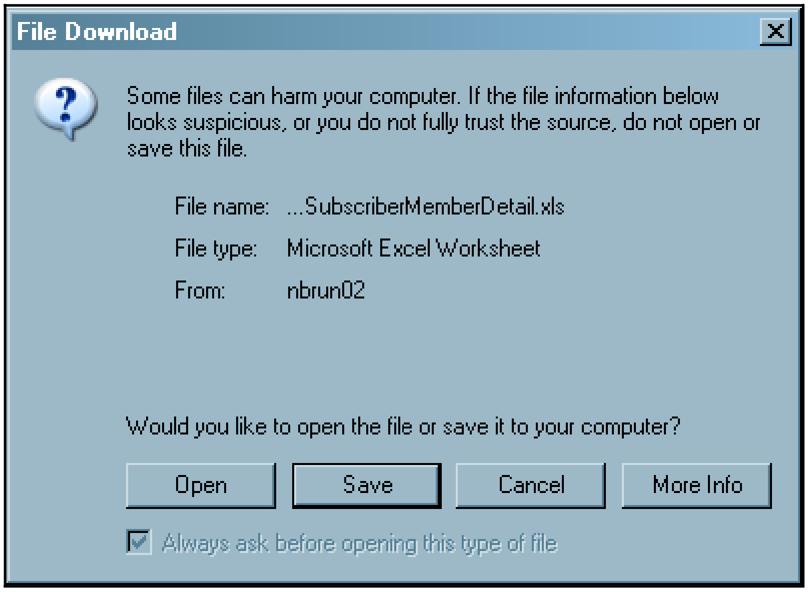
Some files can harm your computer. If the file information below looks suspicious, or you do not fully trust the source, do not open or save this file.

File name: ...SubscriberMemberDetail.xls
File type: Microsoft Excel Worksheet
From: nbrun02

Would you like to open the file or save it to your computer?

5. Click **<Save >** to save the SUBSCRIBER MEMBER DETAIL Excel spreadsheet file on your computer.

Continued next page...



Some files can harm your computer. If the file information below looks suspicious, or you do not fully trust the source, do not open or save this file.

File name: ...SubscriberMemberDetail.xls
File type: Microsoft Excel Worksheet
From: nbrun02

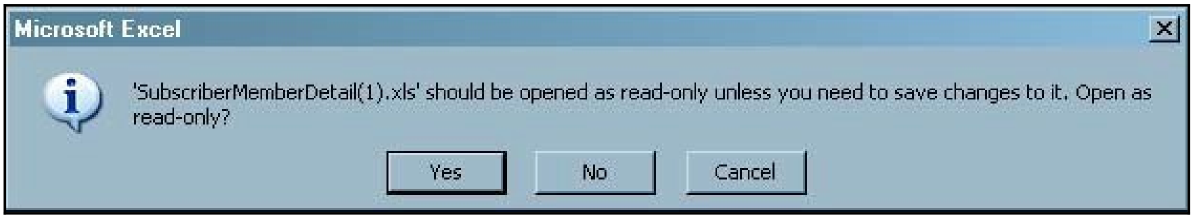
Would you like to open the file or save it to your computer?

Review Current Invoice (cont.)

6. Click **<Open >** to open the SUBSCRIBER MEMBER DETAIL into a Microsoft Excel spreadsheet.

Important: If you do not see the Open button on the File Download window, you might not have Microsoft Excel installed on your computer.

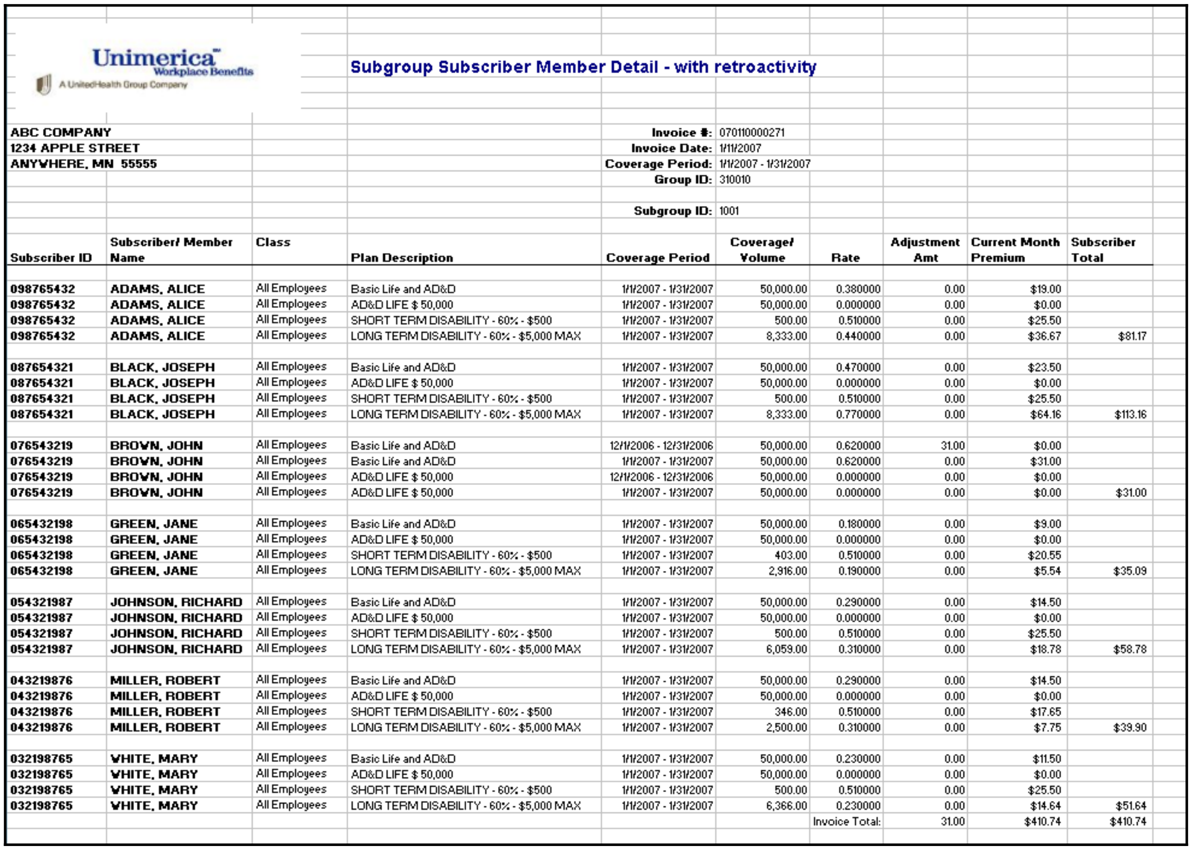
7. A blank MS Excel spreadsheet will open with the following informational message.



'SubscriberMemberDetail(1).xls' should be opened as read-only unless you need to save changes to it. Open as read-only?

8. Click **<Cancel >** to close the informational window without opening the SUBSCRIBER MEMBER DETAIL spreadsheet.
9. Click **<Yes >** to open the spreadsheet in read-only mode.

Continued next page...



Subgroup Subscriber Member Detail - with retroactivity

ABC COMPANY
1234 APPLE STREET
ANYWHERE, MN 55555

Invoice #: 070110000271
Invoice Date: 1/11/2007
Coverage Period: 1/1/2007 - 1/31/2007
Group ID: 310010

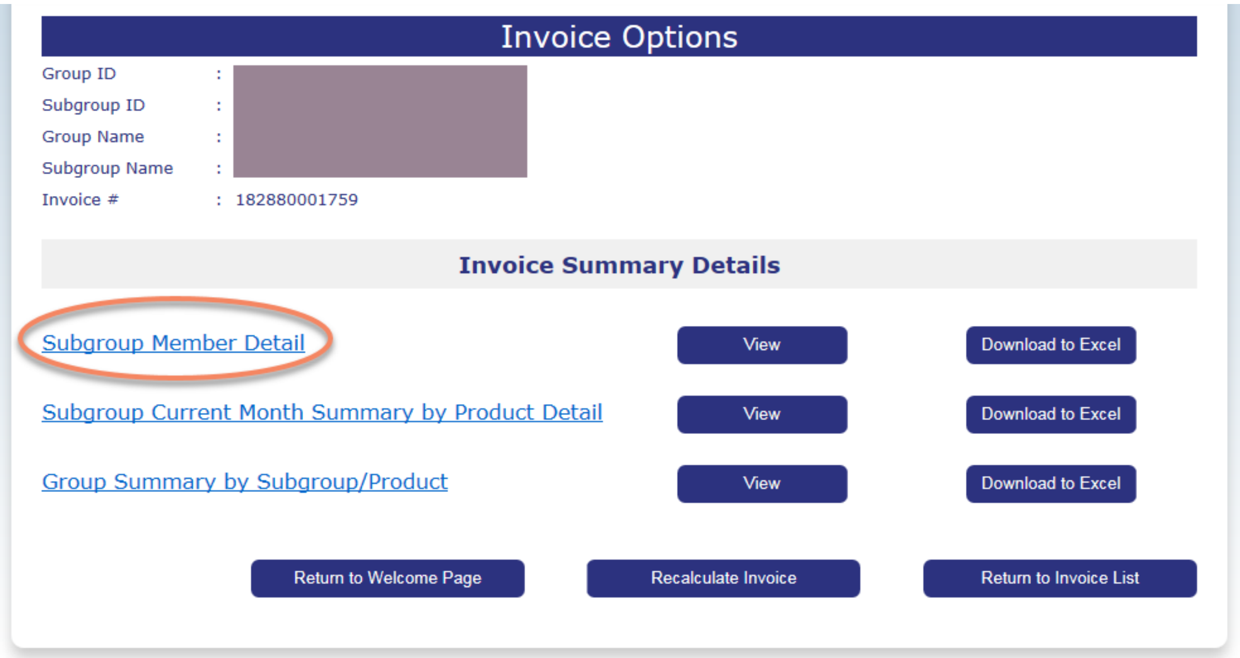
Subgroup ID: 1001

Subscriber ID	Subscriber/ Member Name	Class	Plan Description	Coverage Period	Coverage/ Volume	Rate	Adjustment Amt	Current Month Premium	Subscriber Total
098765432	ADAMS, ALICE	All Employees	Basic Life and AD&D	1/1/2007 - 1/31/2007	50,000.00	0.380000	0.00	$19.00	
098765432	ADAMS, ALICE	All Employees	AD&D LIFE $ 50,000	1/1/2007 - 1/31/2007	50,000.00	0.000000	0.00	$0.00	
098765432	ADAMS, ALICE	All Employees	SHORT TERM DISABILITY - 60% - $500	1/1/2007 - 1/31/2007	500.00	0.510000	0.00	$25.50	
098765432	ADAMS, ALICE	All Employees	LONG TERM DISABILITY - 60% - $5,000 MAX	1/1/2007 - 1/31/2007	8,333.00	0.440000	0.00	$36.67	$81.17
087654321	BLACK, JOSEPH	All Employees	Basic Life and AD&D	1/1/2007 - 1/31/2007	50,000.00	0.470000	0.00	$23.50	
087654321	BLACK, JOSEPH	All Employees	AD&D LIFE $ 50,000	1/1/2007 - 1/31/2007	50,000.00	0.000000	0.00	$0.00	
087654321	BLACK, JOSEPH	All Employees	SHORT TERM DISABILITY - 60% - $500	1/1/2007 - 1/31/2007	500.00	0.510000	0.00	$25.50	
087654321	BLACK, JOSEPH	All Employees	LONG TERM DISABILITY - 60% - $5,000 MAX	1/1/2007 - 1/31/2007	8,333.00	0.770000	0.00	$64.16	$113.16
076543219	BROWN, JOHN	All Employees	Basic Life and AD&D	12/1/2006 - 12/31/2006	50,000.00	0.620000	31.00	$0.00	
076543219	BROWN, JOHN	All Employees	Basic Life and AD&D	1/1/2007 - 1/31/2007	50,000.00	0.620000	0.00	$31.00	
076543219	BROWN, JOHN	All Employees	AD&D LIFE $ 50,000	12/1/2006 - 12/31/2006	50,000.00	0.000000	0.00	$0.00	
076543219	BROWN, JOHN	All Employees	AD&D LIFE $ 50,000	1/1/2007 - 1/31/2007	50,000.00	0.000000	0.00	$0.00	$31.00
065432198	GREEN, JANE	All Employees	Basic Life and AD&D	1/1/2007 - 1/31/2007	50,000.00	0.180000	0.00	$9.00	
065432198	GREEN, JANE	All Employees	AD&D LIFE $ 50,000	1/1/2007 - 1/31/2007	50,000.00	0.000000	0.00	$0.00	
065432198	GREEN, JANE	All Employees	SHORT TERM DISABILITY - 60% - $500	1/1/2007 - 1/31/2007	403.00	0.510000	0.00	$20.55	
065432198	GREEN, JANE	All Employees	LONG TERM DISABILITY - 60% - $5,000 MAX	1/1/2007 - 1/31/2007	2,916.00	0.190000	0.00	$5.54	$35.09
054321987	JOHNSON, RICHARD	All Employees	Basic Life and AD&D	1/1/2007 - 1/31/2007	50,000.00	0.290000	0.00	$14.50	
054321987	JOHNSON, RICHARD	All Employees	AD&D LIFE $ 50,000	1/1/2007 - 1/31/2007	50,000.00	0.000000	0.00	$0.00	
054321987	JOHNSON, RICHARD	All Employees	SHORT TERM DISABILITY - 60% - $500	1/1/2007 - 1/31/2007	500.00	0.510000	0.00	$25.50	
054321987	JOHNSON, RICHARD	All Employees	LONG TERM DISABILITY - 60% - $5,000 MAX	1/1/2007 - 1/31/2007	6,059.00	0.310000	0.00	$18.78	$58.78
043219876	MILLER, ROBERT	All Employees	Basic Life and AD&D	1/1/2007 - 1/31/2007	50,000.00	0.290000	0.00	$14.50	
043219876	MILLER, ROBERT	All Employees	AD&D LIFE $ 50,000	1/1/2007 - 1/31/2007	50,000.00	0.000000	0.00	$0.00	
043219876	MILLER, ROBERT	All Employees	SHORT TERM DISABILITY - 60% - $500	1/1/2007 - 1/31/2007	346.00	0.510000	0.00	$17.65	
043219876	MILLER, ROBERT	All Employees	LONG TERM DISABILITY - 60% - $5,000 MAX	1/1/2007 - 1/31/2007	2,500.00	0.310000	0.00	$7.75	$39.90
032198765	WHITE, MARY	All Employees	Basic Life and AD&D	1/1/2007 - 1/31/2007	50,000.00	0.230000	0.00	$11.50	
032198765	WHITE, MARY	All Employees	AD&D LIFE $ 50,000	1/1/2007 - 1/31/2007	50,000.00	0.000000	0.00	$0.00	
032198765	WHITE, MARY	All Employees	SHORT TERM DISABILITY - 60% - $500	1/1/2007 - 1/31/2007	500.00	0.510000	0.00	$25.50	
032198765	WHITE, MARY	All Employees	LONG TERM DISABILITY - 60% - $5,000 MAX	1/1/2007 - 1/31/2007	6,366.00	0.230000	0.00	$14.64	$51.64
						Invoice Total:	31.00	$410.74	$410.74

Review Current Invoice (cont.)

10. The SUBSCRIBER MEMBER DETAIL spreadsheet is loaded into a Microsoft Excel workbook/worksheet and sorted by the last name of the Subscriber or Member.
11. The Microsoft Excel spreadsheet opens into a new window.
12. The spreadsheet can be manipulated, modified and saved using the Microsoft Windows **Save As** function.
13. To return to the **INVOICE OPTIONS** screen, click on the INVOICE OPTIONS tab on the bottom toolbar. Below is an example of the tab:

14. Or, close the Microsoft Excel spreadsheet.



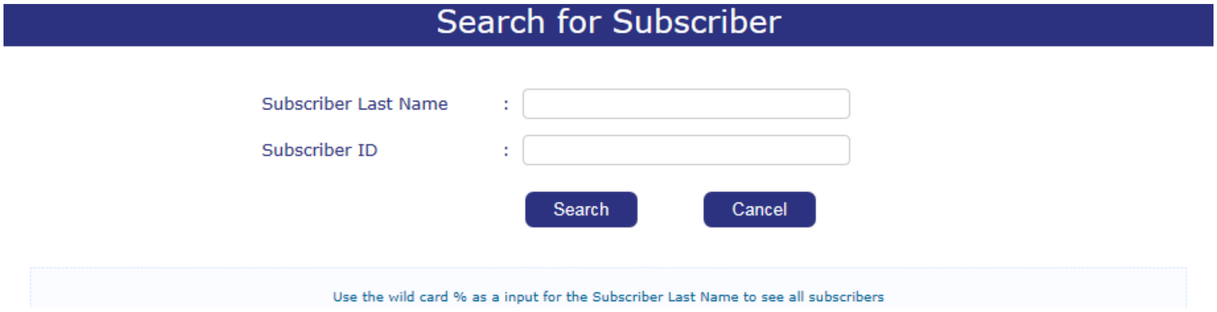
Group ID :
Subgroup ID :
Group Name :
Subgroup Name :
[redacted]
Invoice # : 182880001759

Update Subscriber from Current Invoice

After reviewing the SUBGROUP MEMBER DETAIL on a current invoice, you will be able to update the subscriber through the **INVOICE OPTION** screen.

To review and/or update a specific subscriber or member on the current invoice, please follow these steps:

1. Follow the steps to open the INVOICE OPTIONS screen for the current invoice.
2. Click on the Subgroup Member Detail link from the INVOICE OPTIONS screen.
3. The SEARCH FOR SUBSCRIBER screen opens.
4. Type in the Subscribers Last Name or ID and click **<Search>**.



Use the wild card % as a input for the Subscriber Last Name to see all subscribers

Click on the **View Summary** icon to open the SUBGROUP SUBSCRIBER MEMBER DETAIL – WITH RETROACTIVITY report for the current invoice.

Continued on next page…

Subgroup Subscriber Member Detail - with retroactivity

[redacted]

Invoice # : 182880001759
Invoice Date : 10/15/2018
Coverage Period : 11/1/2018 - 11/30/2018
Group ID :
Subgroup ID/Description : [redacted]

Please review your billing detail. If a member change has occurred, please click on the subscriber name to make appropriate adjustments.
Once all adjustments have been completed, select the Recalculate Invoice button on the Invoice Options page.

Subscriber/Member Name	Class	Plan Description	Coverage Period	Coverage/Volume	Rate	Adjustment Amt	Current Month Premium
SMITH, JONATHAN	All Active FT Employees	Basic Life	11/1/2018 - 11/30/2018	$50,000.00	0.0700		$3.50
SMITH, JONATHAN	All Active FT Employees	Basic AD&D	11/1/2018 - 11/30/2018	$50,000.00	0.0200		$1.00
SMITH, JONATHAN	All Active FT Employees	Critical Illness: EE Non-Tobacco	11/1/2018 - 11/30/2018	$5,000.00	0.4300		$2.15
SMITH, JONATHAN	All Active FT Employees	Hospital Indemnity Base: EE Option A	11/1/2018 - 11/30/2018	$1.00	17.0400		$17.04
SMITH, JONATHAN	All Active FT Employees	Accident Base: EE	11/1/2018 - 11/30/2018	$1.00	6.0400		$6.04
					Invoice Total:		$29.73

All adjustments on this page will be based on enrollment changes. No manual corrections can be done on this page.

If you have billing questions, please call: (866) 322-1210

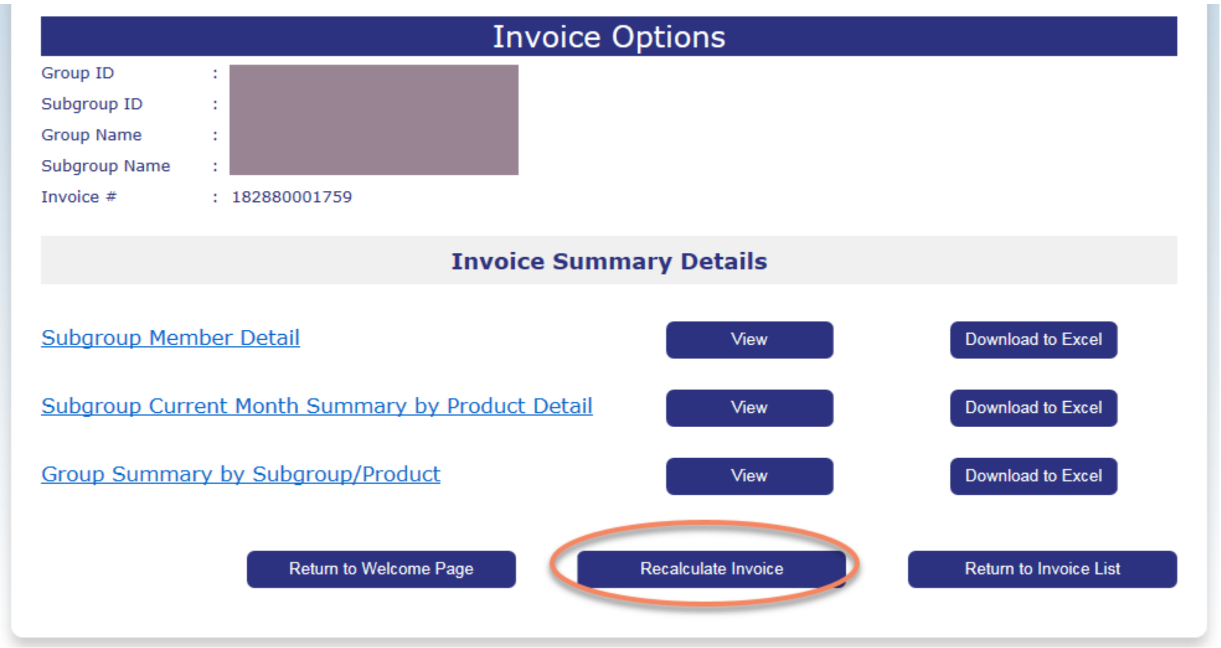
Note: All adjustments on this page are based on enrollment changes. No manual corrections can be done on this page.

If adjustments must be made for this subscriber that effects the current invoice, update the subscriber information, return to the INVOICE OPTIONS screen and select the **Recalculate Invoice** button.

Continued next page...

Update Subscriber from Current Invoice (cont.)

5. Click on the name link under the SUBSCRIBER/MEMBER NAME column to open the UPDATE SUBSCRIBER screen for the selected subscriber or member.
6. Follow the **Update Subscriber** steps to make the necessary changes. See **Chapter 3 List Bill e-Bill Processing, Section 3: Updating Existing Subscribers** for more detailed information



Group ID : [redacted]
Subgroup ID :
Group Name :
Subgroup Name :
Invoice # : 182880001759

Request for Rebill

If subscriber updates have been made and/or new subscribers have been added that will change the premium due for the current invoice, you may submit a request for rebill.

To submit a request to rebill the current invoice, please follow these steps:

1. Click on the **View/Update Invoice** menu option at the top of the WELCOME TO LIST BILL screen.
2. The **VIEW INVOICES** screen opens.
3. Click **<Update >** at the right-hand side of the current invoice to open the **INVOICE OPTIONS** screen.
4. Click **<Recalculate Invoice>** to submit the request to rebill the current invoice.
5. The confirmation pop-up message with appear. For example:

Your request for recalculation of Invoice ID 070520000526 has been received and will be recalculated for your review and payment submission. You will receive an email notification when the updated invoice is available.

6. The billing batch run is usually on the 15th of each month. If the system date is three days prior to the next billing batch run, you may receive the following message instead:

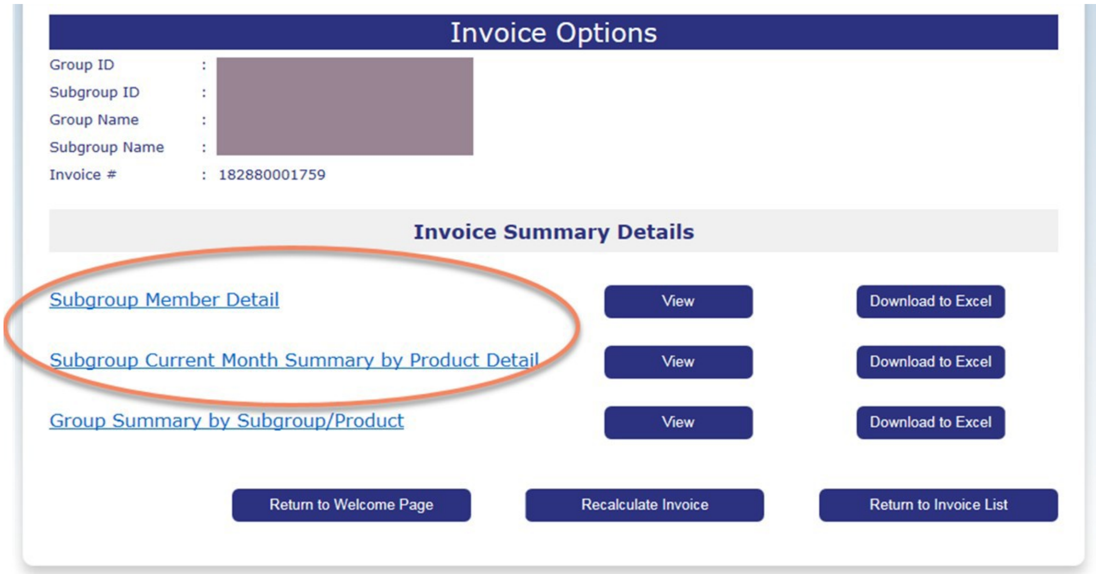
The cut off date for rebill request is over for this due date

Continued next page…

Request for Rebill (cont.)

7. You can only recalculate an invoice up to three times between each billing batch run date. If you attempt to recalculate more than 3 times, an error message will appear. For example:

> Your request for recalculation of Invoice ID #XXXXXXXX cannot be processed at this time. Recalculations of invoices are limited to 3 times. Please contact us at 1-866-322-1210 for assistance. Select option # 1 at the prompt.



Invoice Options

Group ID : [redacted]
Subgroup ID :
Group Name :
Subgroup Name :
Invoice # : 182880001759

Subgroup Summary Reports

There are two other subgroup reports available on the INVOICE OPTIONS screen. If you have subgroup level access, the SUBGROUP CURRENT MONTH SUMMARY BY PRODUCT DETAIL and SUBGROUP SUMMARY BY CLASS/PRODUCT report is available for your review.

To **review** the subgroup summary reports, please follow these steps:

1. Select the **View/Update Invoice** menu option from the WELCOME TO LIST BILL screen.
2. The **VIEW INVOICES** screen opens.

Continued next page…

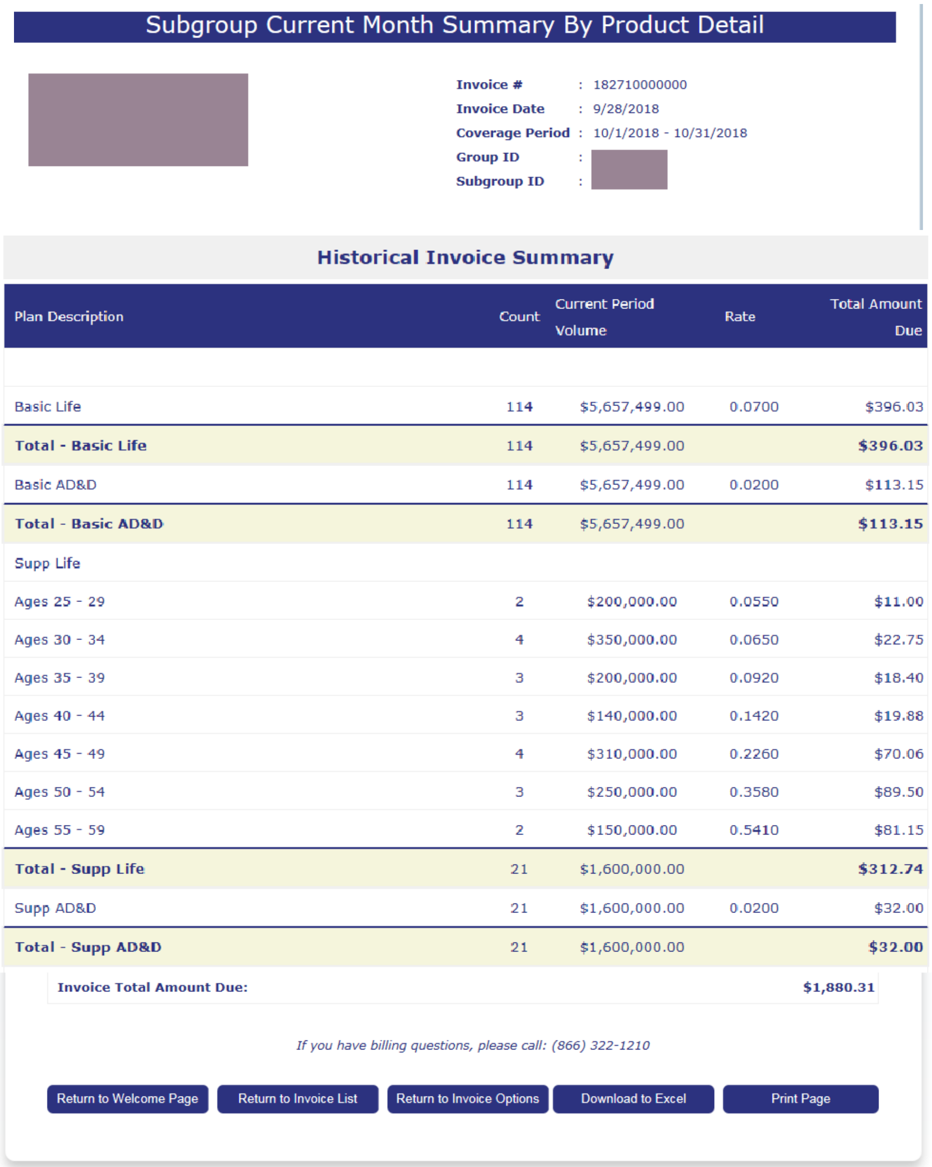
Subgroup Summary Reports (cont.)

3. Click **<Update >** for the current invoice or the Invoice ID link for an historical invoice.
4. The **INVOICE OPTIONS** screen opens for the selected invoice.
5. Click **<View >** for the subgroup summary report to display on the screen.

> **Note:** For examples of the subgroup summary reports, see the next page.

6. From the report screen, click **<Download to Excel >** to open the report in a Microsoft Excel spreadsheet. You will be able to manipulate, save or print the report using the Microsoft Windows functionality.
7. Or, click **<Print Page>** to send the report to your local printer.
8. Or, click **<Return to Invoice Options>** to select a different report or view the SUBGROUP MEMBER DETAIL.
9. Or, click **<Return to Invoice List>** to select a different invoice.
10. Or, click **<Return to Welcome Page>** to return to the WELCOME TO LIST BILL screen.

Subgroup Current Month Summary by Product Detail:



Subgroup Current Month Summary By Product Detail

[redacted]

Invoice # : 182710000000
Invoice Date : 9/28/2018
Coverage Period : 10/1/2018 - 10/31/2018
Group ID : [redacted]
Subgroup ID :

Historical Invoice Summary

Plan Description	Count	Current Period Volume	Rate	Total Amount Due
Basic Life	114	$5,657,499.00	0.0700	$396.03
Total - Basic Life	114	$5,657,499.00		**$396.03**
Basic AD&D	114	$5,657,499.00	0.0200	$113.15
Total - Basic AD&D	114	$5,657,499.00		**$113.15**
Supp Life				
Ages 25 - 29	2	$200,000.00	0.0550	$11.00
Ages 30 - 34	4	$350,000.00	0.0650	$22.75
Ages 35 - 39	3	$200,000.00	0.0920	$18.40
Ages 40 - 44	3	$140,000.00	0.1420	$19.88
Ages 45 - 49	4	$310,000.00	0.2260	$70.06
Ages 50 - 54	3	$250,000.00	0.3580	$89.50
Ages 55 - 59	2	$150,000.00	0.5410	$81.15
Total - Supp Life	21	$1,600,000.00		**$312.74**
Supp AD&D	21	$1,600,000.00	0.0200	$32.00
Total - Supp AD&D	21	$1,600,000.00		**$32.00**

Invoice Total Amount Due: **$1,880.31**

If you have billing questions, please call: (866) 322-1210

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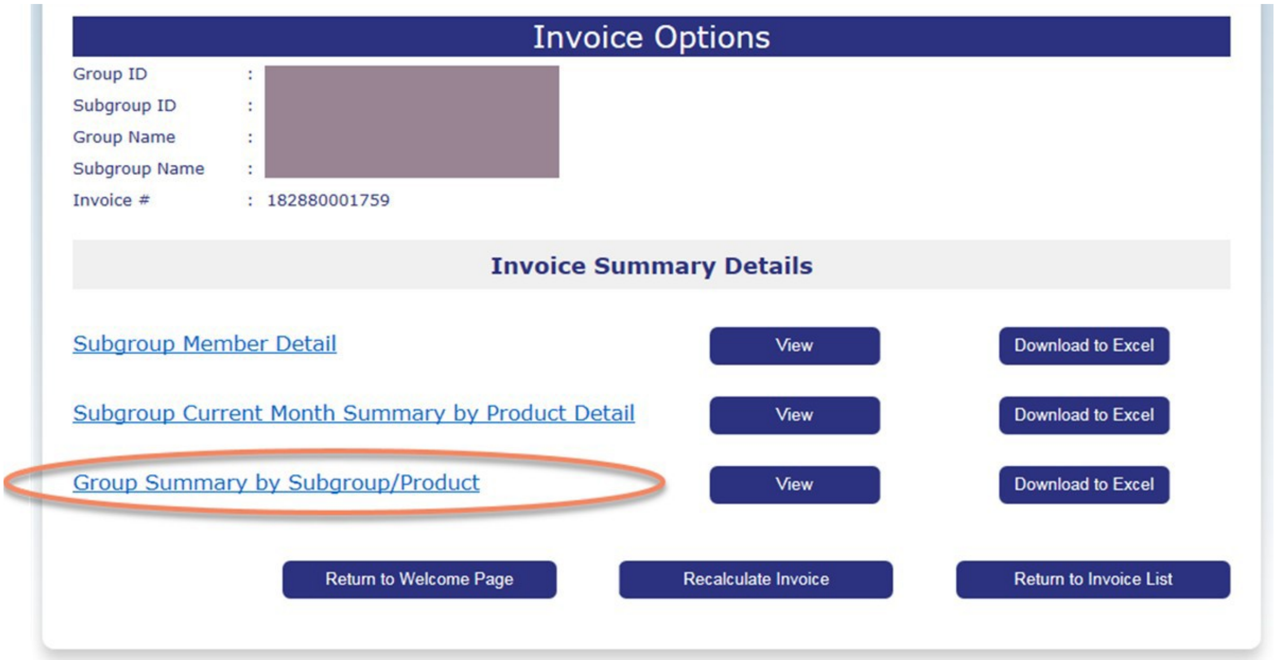


Group ID : [redacted]
Subgroup ID :
Group Name :
Subgroup Name :
Invoice # : 182880001759

Group Summary Report

If you have group level access, the <u>Group Summary by Subgroup Detail</u> report is available for your review.

To **review** the group summary by subgroup report, please follow these steps:

1. Select the **View/Update Invoice** menu option from the Welcome to List Bill screen.
2. The View Invoices screen opens.
3. Click **<Update >** for the current invoice or the <u>Invoice ID</u> link for an historical invoice.
4. The Invoice Options screen opens for the selected invoice.
5. Click **<View >** for the report to display on the screen.

> **Note:** For an example of the report, see the next page.

6. From the report screen, click **<Download to Excel >** to open the report into a Microsoft Excel file.
7. Or, click **<Print Page>** to send the report to your local printer.
8. Or, click **<Return to Invoice Options>** to select a different report or view the Subgroup Member Detail.
9. Or, click **<Return to Invoice List>** to select a different invoice.
10. Or, click **<Return to Welcome Page>** to return to the Welcome to List Bill screen.

Continued next page...

Group Summary by Subgroup/Products:

Group Summary by Subgroup/Product

[redacted]

Coverage Period : 10/1/2018 - 10/31/2018
Group ID : [redacted]

Group Invoice Summary

Subgroup ID/Description	Plan Description	Adjustments	Current	Total
1001 - MACKIE WOLF ZIENTZ & MANN				
	Accident Base/Enhanced: EE		$55.00	$55.00
	Accident Base/Enhanced: EE+CH		$28.08	$28.08
	Accident Base/Enhanced: EE+SP		$17.52	$17.52
	Accident Base/Enhanced: Family		$82.24	$82.24
	Accident Base: EE		$30.20	$30.20
	Accident Base: EE+CH		$13.20	$13.20
	Accident Base: Family		$20.80	$20.80
	Basic AD&D		$113.15	$113.15
	Basic Life		$396.03	$396.03
	Critical Illness: CH $2,500		$1.95	$1.95

Section 6: Paying an Invoice

PURPOSE

This section provides detailed information regarding paying an invoice using the e-Bill Services system. You have the option to print the invoice and pay by mail, pay each month electronically or setup payment method **Scheduled Direct Debit**.

To pay your invoice electronically, you must provide bank information and authorization by submitting an Electronic Payment Authorization form. See Chapter X for more detailed information on obtaining the proper form.

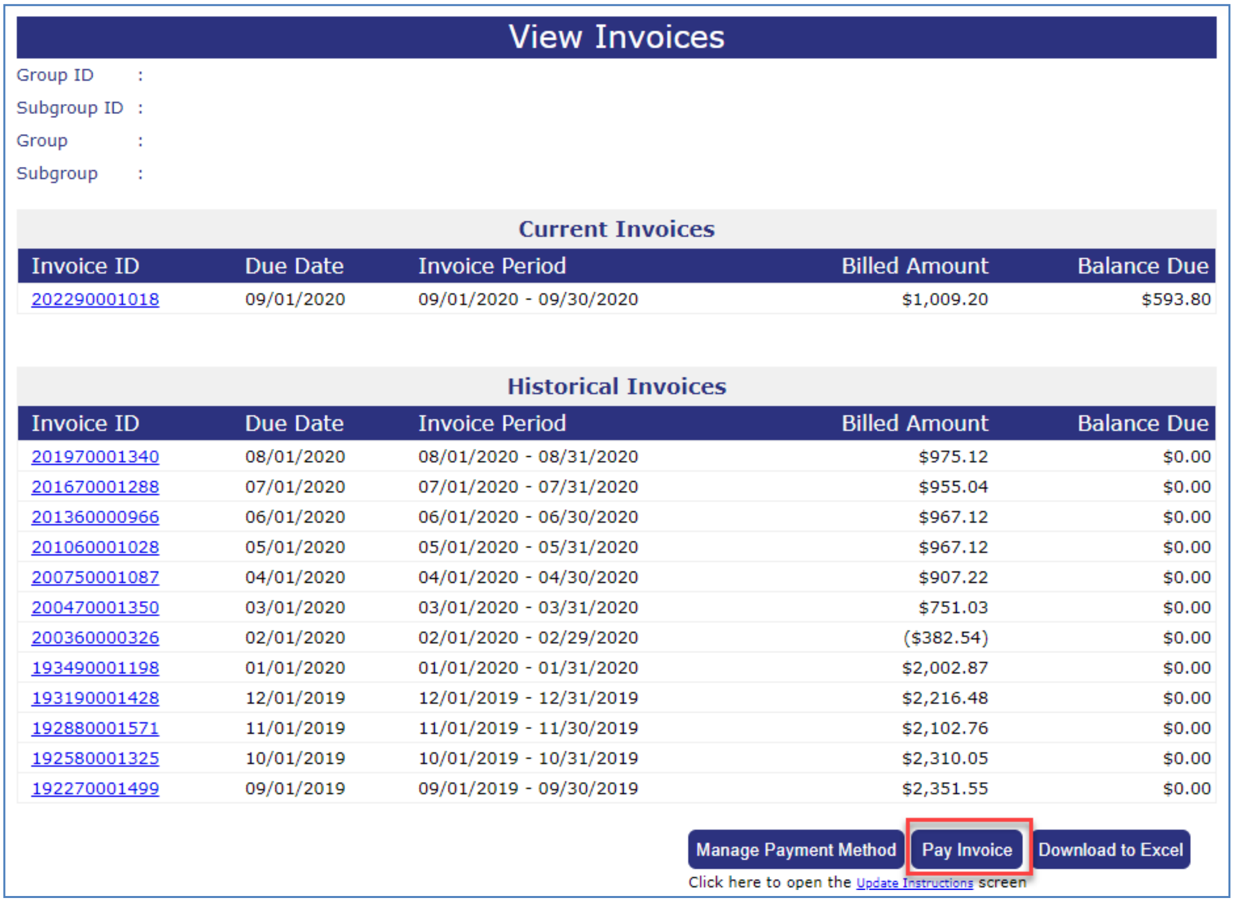
To schedule Direct Debits for invoiced amounts that occur automatically each monthly based upon ***"Payment Date"*** selection during the setup process, on either the 10th or the 25th calendar day of the month.

BEFORE YOU BEGIN

Login to the e-Bill Services system and opening the WELCOME TO LIST BILL screen.

IN THIS SECTION

This section includes the following topics:



View Invoices

Group ID :
Subgroup ID :
Group :
Subgroup :

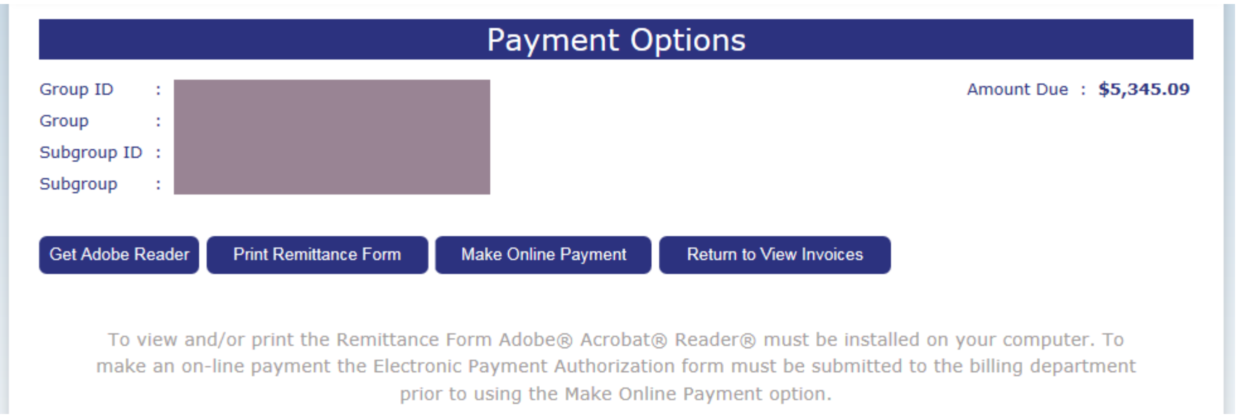
Current Invoices

Invoice ID	Due Date	Invoice Period	Billed Amount	Balance Due
202290001018	09/01/2020	09/01/2020 - 09/30/2020	$1,009.20	$593.80

Historical Invoices

Invoice ID	Due Date	Invoice Period	Billed Amount	Balance Due
201970001340	08/01/2020	08/01/2020 - 08/31/2020	$975.12	$0.00
201670001288	07/01/2020	07/01/2020 - 07/31/2020	$955.04	$0.00
201360000966	06/01/2020	06/01/2020 - 06/30/2020	$967.12	$0.00
201060001028	05/01/2020	05/01/2020 - 05/31/2020	$967.12	$0.00
200750001087	04/01/2020	04/01/2020 - 04/30/2020	$907.22	$0.00
200470001350	03/01/2020	03/01/2020 - 03/31/2020	$751.03	$0.00
200360000326	02/01/2020	02/01/2020 - 02/29/2020	($382.54)	$0.00
193490001198	01/01/2020	01/01/2020 - 01/31/2020	$2,002.87	$0.00
193190001428	12/01/2019	12/01/2019 - 12/31/2019	$2,216.48	$0.00
192880001571	11/01/2019	11/01/2019 - 11/30/2019	$2,102.76	$0.00
192580001325	10/01/2019	10/01/2019 - 10/31/2019	$2,310.05	$0.00
192270001499	09/01/2019	09/01/2019 - 09/30/2019	$2,351.55	$0.00

Click here to open the Update Instructions screen



Payment Options

Group ID :
Group :
Subgroup ID :
Subgroup :
[redacted]

Amount Due : **$5,345.09**

To view and/or print the Remittance Form Adobe® Acrobat® Reader® must be installed on your computer. To make an on-line payment the Electronic Payment Authorization form must be submitted to the billing department prior to using the Make Online Payment option.

Continued next page...

Pay Invoice by Mail

To pay your invoice by mail, please follow these steps:

1. Click on the **View/Update Invoice** menu option at the top of the screen to open the VIEW INVOICES screen.
2. Click **<Pay Invoice>** at the bottom of the screen to open the **PAYMENT OPTIONS** screen.
3. To pay with a check, click **<Print Remittance Form>**.

Note: You must have Adobe Acrobat Reader installed on your computer to view and print the remittance form.

Premium Invoice Remittance Summary

[redacted]

Group ID:
Subgroup ID:
[redacted]

Payment Due Date: 11/1/2018

Invoice ID	Coverage Period	Amount
[redacted]	09/01/2018 - 09/30/2018	$1,584.47
	10/01/2018 - 10/31/2018	$1,880.31
	11/01/2018 - 11/30/2018	$1,880.31
Total Premium Due : PLEASE PAY AMOUNT AS BILLED		$5,345.09
Payment Amount		$5,345.09

Make Checks Payable To: UNITEDHEALTHCARE

Return Payment To:
UnitedHealthcare
PO Box 860511
Minneapolis, MN 55486-0511

If you are paying by check, please return this page along with your payment to the address above.

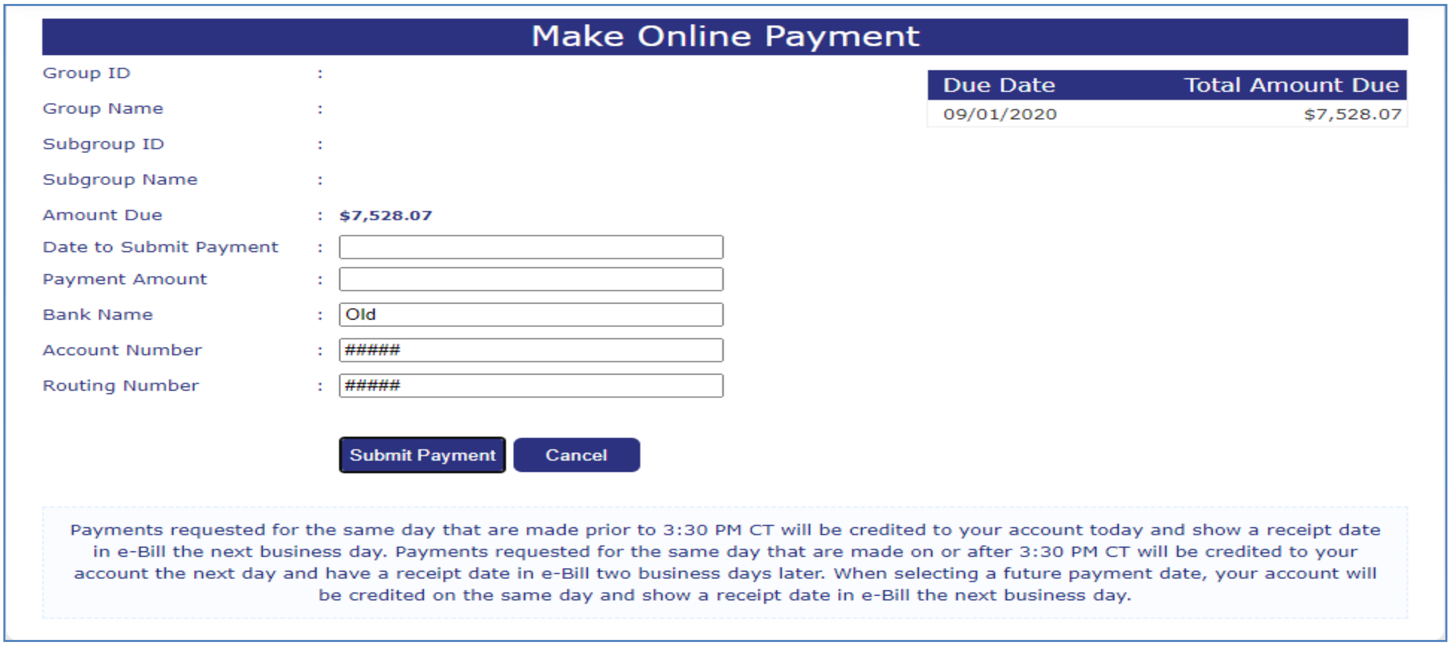
If you have billing questions, please call 1-866-322-1210

Continued next page...

Pay Invoice by Mail (cont.)

4. The **Premium Invoice Remittance Summary** appears as a Portable Document Format (PDF) file.
5. The remittance summary will display all the invoices that are currently unpaid in the following format:
    - Invoice Number
    - Coverage Period
    - Invoice Amount Due
    - Total Premium Due
6. Click on the **Print** icon on the Adobe Acrobat Reader toolbar to print the remittance summary in landscape. Be sure to return the remittance summary with your payment.
7. Mail your Payment to the address provided at the bottom of the invoice.
8. Or, for **Overnight payments** use the following address

UnitedHealthcare Specialty Benefits 2485
C/O Citibank Lockbox Operations
8430 W. Bryn Mawr Avenue, 3rd Floor
Chicago, IL 60631



Make Online Payment

Group ID :
Group Name :
Subgroup ID :
Subgroup Name :
Amount Due : **$7,528.07**
Date to Submit Payment :
Payment Amount :
Bank Name : Old
Account Number : #####
Routing Number : #####

Due Date	Total Amount Due
09/01/2020	$7,528.07

Payments requested for the same day that are made prior to 3:30 PM CT will be credited to your account today and show a receipt date in e-Bill the next business day. Payments requested for the same day that are made on or after 3:30 PM CT will be credited to your account the next day and have a receipt date in e-Bill two business days later. When selecting a future payment date, your account will be credited on the same day and show a receipt date in e-Bill the next business day.

Make Online Payment

To make an online payment, please follow these steps:

1. Click on the **Make Online Payment** button on the PAYMENT OPTIONS screen.
2. The address to send the form is located in the **Contact Us** menu item. You will need to provide the following account information:
    - Bank Name, Address and Phone
    - Bank Routing Number
    - Your Account Name, Number and Type
    - Authorized Signer Name, Phone Number and email address
    - The Make Online Payment screen open

Important Note: To make an electronic payment, the Electronic Payment Authorization Form must be completed, signed and mailed to the UnitedHealthcare Specialty Benefits billing department. See **Chapter 5: Forms Library System, Topic: Electronic Payment Authorization Form** to learn how to obtain a copy of the form.

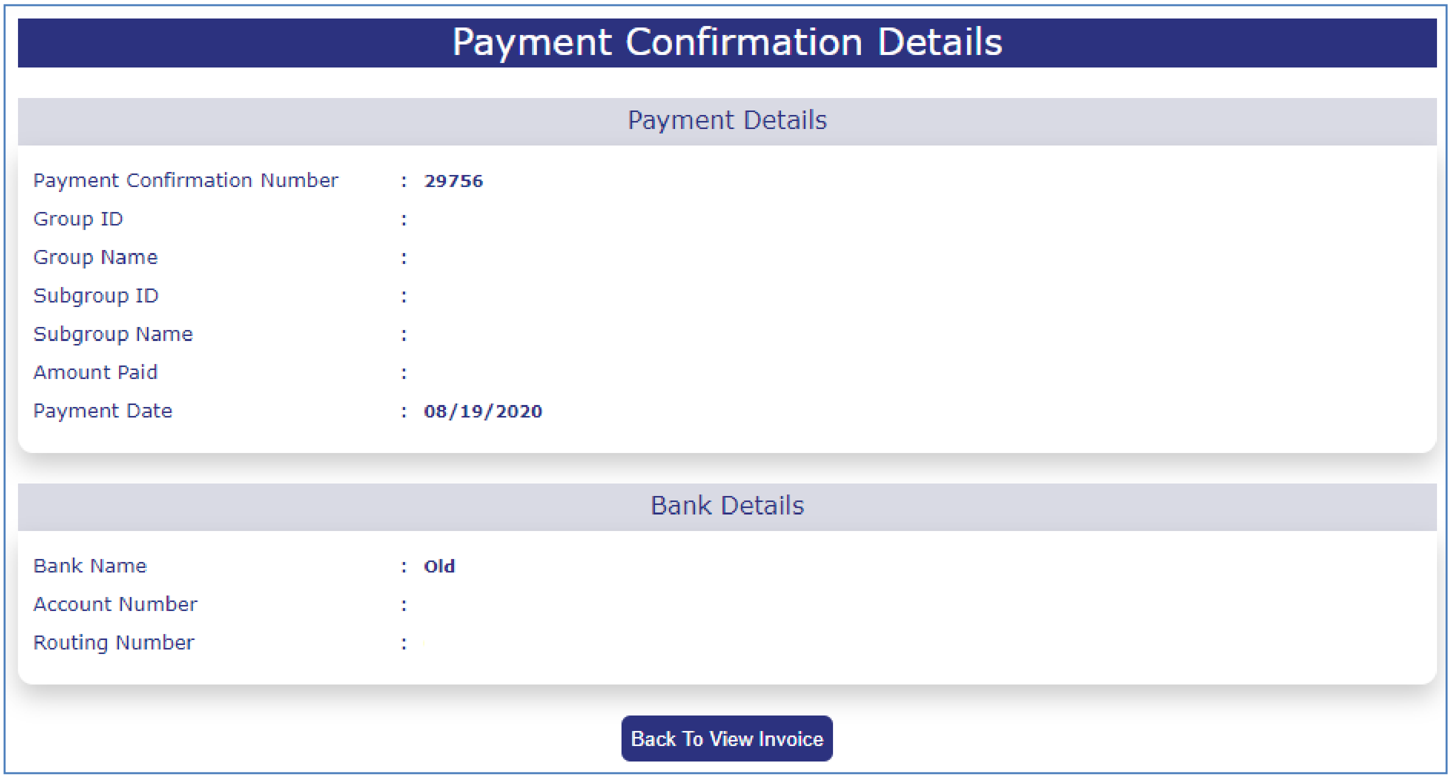
Continued next page...

Make Online Payment (cont.)

3. The BANK NAME, ACCOUNT NUMBER and ROUTING NUMBER fields are populated with your bank information when you have set up this option with UnitedHealthcare Specialty Benefits Billing Department. You will not be able to enter this information on-line.
4. If the bank information has not been previously set up with the billing department, you will receive the following message at the top of the MAKE ONLINE PAYMENT screen: Your bank information was not found. Please submit the Electronic Payment Authorization form to the UnitedHealthcare Specialty Benefits Billing Department. You will not be able to continue with the on-line payment process.
5. Verify the amount due matches the outstanding amount due for all your online invoices. If there is a discrepancy, contact UnitedHealthcare Specialty Benefits Billing Administrator.
6. Click on the PAYMENT AMOUNT field and type in the actual amount of your payment.
7. Click on the down arrow at the end of the DATE TO SUBMIT PAYMENT field to open the pop-up calendar.
8. Select the date of the month the money will be transferred from your account to UnitedHealthcare Specialty Benefits. The payment date must be a business day.
9. Click on the > arrow on the pop-up calendar to change to the following month.
10. Please review the selecting a payment date information in red text at the bottom of the screen.
11. Click on the **Submit Payment** button on the MAKE ONLINE PAYMENT screen to submit your online payment.
12. Or, click on the **Cancel** button to close the MAKE ONLINE PAYMENT screen and return to the PAYMENT OPTIONS screen.
13. When you submit your online payment the confirmation window opens.
14. A PAYMENT CONFIRMATION NUMBER is created and displayed on the confirmation window.
15. Please print the screen for your records, if necessary.
16. Click **<Back to View Invoice>** to close the confirmation screen and return to the VIEW INVOICES screen.

Continued on next page

Make Online Payment (cont.)



Payment Confirmation Details

Payment Details

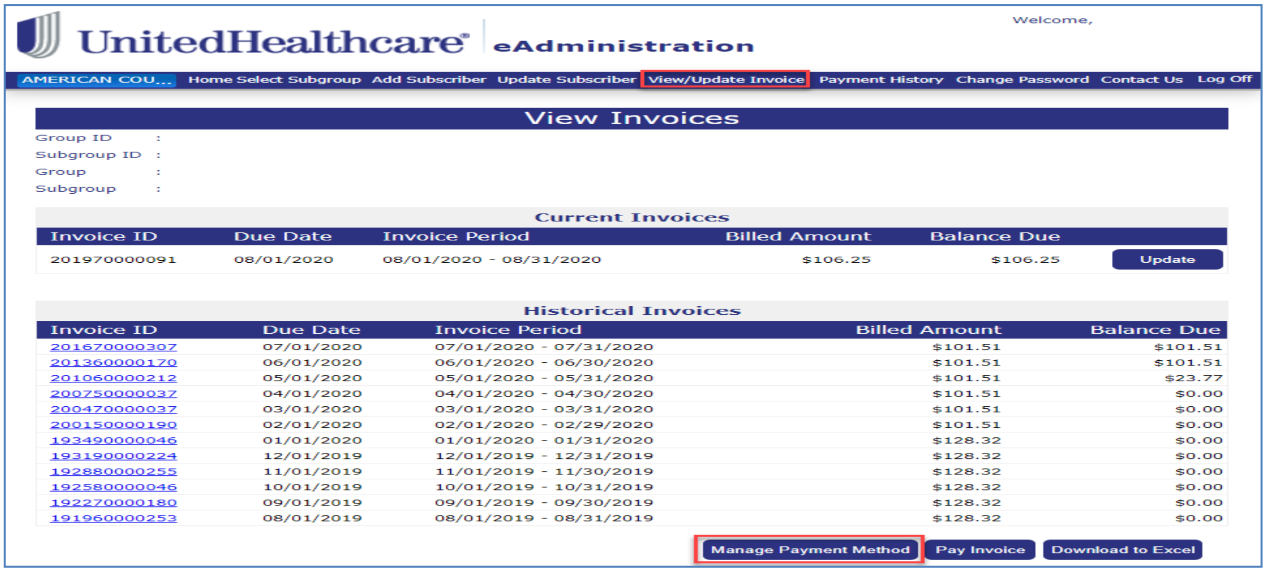
Payment Confirmation Number	: **29756**
Group ID	:
Group Name	:
Subgroup ID	:
Subgroup Name	:
Amount Paid	:
Payment Date	: **08/19/2020**

Bank Details

Bank Name	: **Old**
Account Number	:
Routing Number	:

Scheduled Direct Debit ACH – Add Account

- Allowed three transaction daily, any combination of **"Add, Update or Cancel"**.



View Invoices

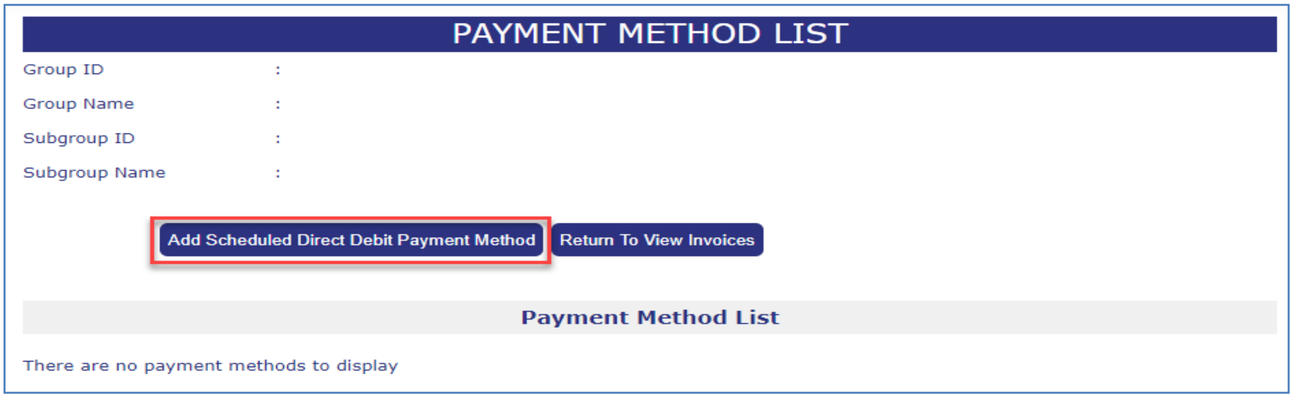
Group ID :
Subgroup ID :
Group :
Subgroup :

Current Invoices

Invoice ID	Due Date	Invoice Period	Billed Amount	Balance Due
201970000091	08/01/2020	08/01/2020 - 08/31/2020	$106.25	$106.25

Historical Invoices

Invoice ID	Due Date	Invoice Period	Billed Amount	Balance Due
201670000307	07/01/2020	07/01/2020 - 07/31/2020	$101.51	$101.51
201360000170	06/01/2020	06/01/2020 - 06/30/2020	$101.51	$101.51
201060000212	05/01/2020	05/01/2020 - 05/31/2020	$101.51	$23.77
200750000037	04/01/2020	04/01/2020 - 04/30/2020	$101.51	$0.00
200470000037	03/01/2020	03/01/2020 - 03/31/2020	$101.51	$0.00
200150000190	02/01/2020	02/01/2020 - 02/29/2020	$101.51	$0.00
193490000046	01/01/2020	01/01/2020 - 01/31/2020	$128.32	$0.00
193190000224	12/01/2019	12/01/2019 - 12/31/2019	$128.32	$0.00
192880000255	11/01/2019	11/01/2019 - 11/30/2019	$128.32	$0.00
192580000046	10/01/2019	10/01/2019 - 10/31/2019	$128.32	$0.00
192270000180	09/01/2019	09/01/2019 - 09/30/2019	$128.32	$0.00
191960000253	08/01/2019	08/01/2019 - 08/31/2019	$128.32	$0.00



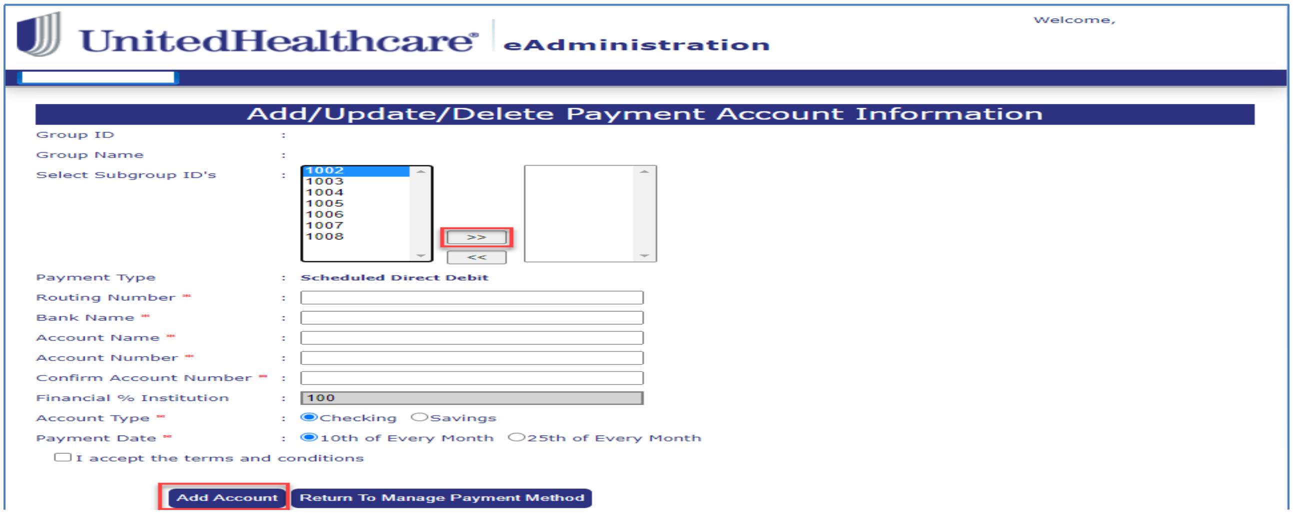
PAYMENT METHOD LIST

Group ID :
Group Name :
Subgroup ID :
Subgroup Name :

Payment Method List

There are no payment methods to display

Continued next page...



Add/Update/Delete Payment Account Information

Group ID :
Group Name :
Select Subgroup ID's : 1002 1003 1004 1005 1006 1007 1008
Payment Type : Scheduled Direct Debit
Routing Number * :
Bank Name * :
Account Name * :
Account Number * :
Confirm Account Number * :
Financial % Institution : 100
Account Type * : ● Checking ○ Savings
Payment Date * : ● 10th of Every Month ○ 25th of Every Month
☐ I accept the terms and conditions

1. Select ***View/Update Invoice***, menu option
2. Select ***Manage Payment Method***, button at bottom of screen.
3. Select ***Add Scheduled Direct Debit Payment Method***, button
4. Select ***Subgroup*** or ***Multiple Subgroups***, that will use the same Account Information
    a. Select >>, double arrows pointing right to **Add**
    b. Select <<, double arrows pointing left to **Remove**
5. Enter All Required Fields, (if incorrect Routing number entered more than two times, prompted to try again later or at another time)
    - Routing Number
    - Bank Name (will auto populate after valid routing number has been entered
    - Account Name
    - Account Number
    - Confirm Account Number
    - Account Type
    - Payment Date
6. Select Click box next to **"I Accept the terms and conditions" link**, read and review then close page or you may return to eAdministrative URL tab.
7. Click **Check box** next to "I Accept the Terms and Condition"
8. Select **Add Account**

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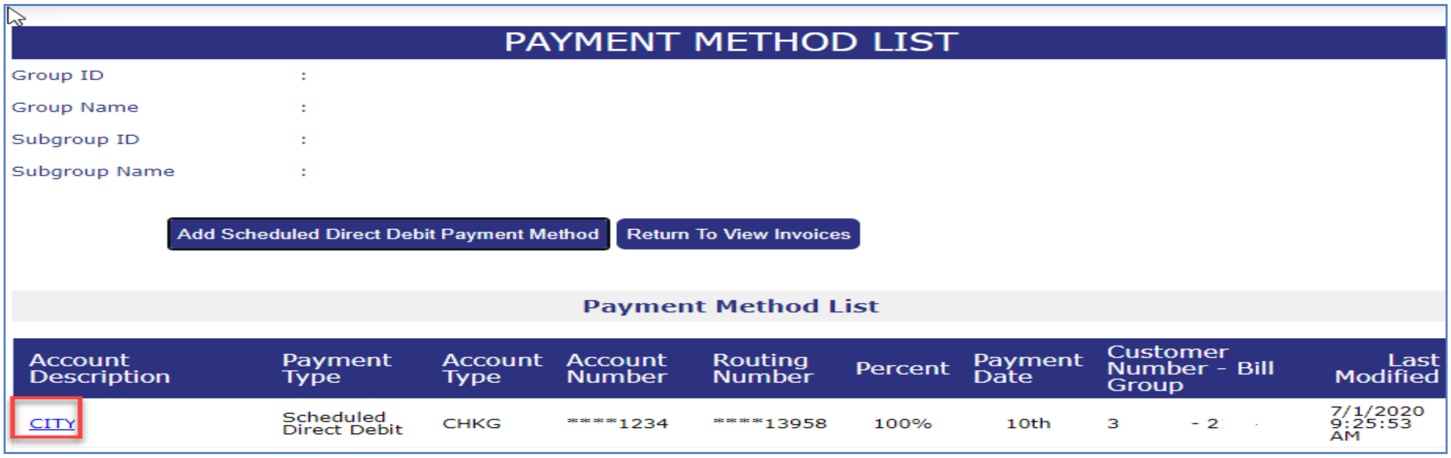
Scheduled Direct Debit ACH – Update Account

- Allowed three transaction daily, any combination of **“Add, Update or Cancel”**.

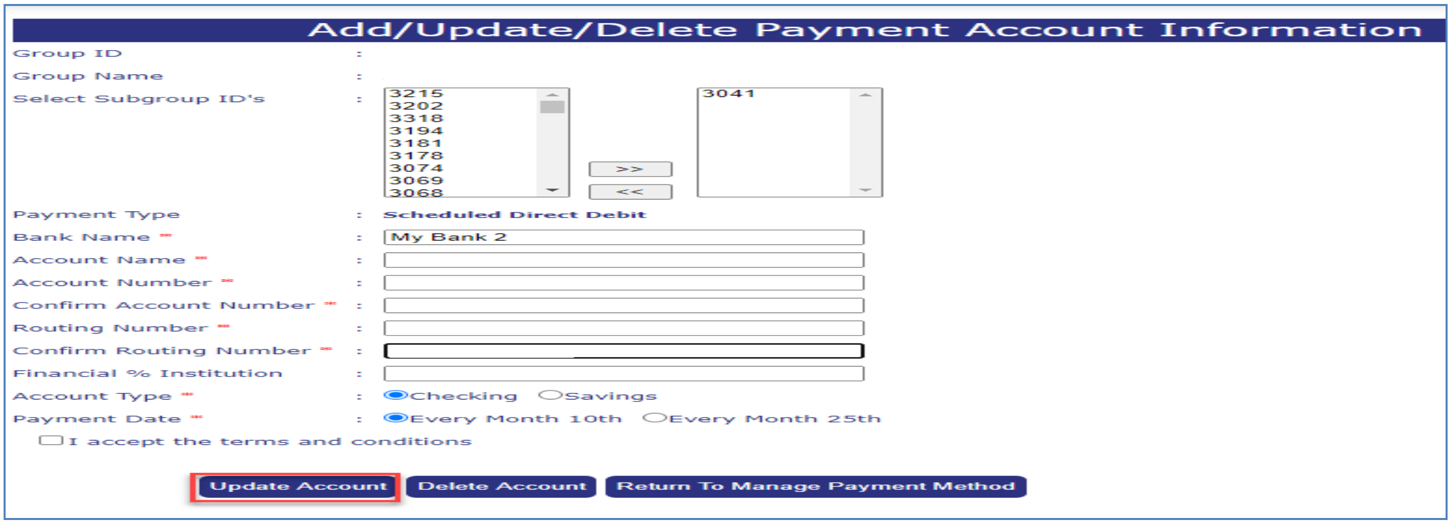


PAYMENT METHOD LIST

Group ID :
Group Name :
Subgroup ID :
Subgroup Name :

Payment Method List

Account Description	Payment Type	Account Type	Account Number	Routing Number	Percent	Payment Date	Customer Number - Bill Group	Last Modified
CITY	Scheduled Direct Debit	CHKG	*****1234	*****13958	100%	10th	3 - 2	7/1/2020 9:25:53 AM



Add/Update/Delete Payment Account Information

Group ID :
Group Name :
Select Subgroup ID's : 3215 3202 3318 3194 3181 3178 3074 3069 3068 | 3041

Payment Type : Scheduled Direct Debit
Bank Name * : My Bank 2
Account Name * :
Account Number * :
Confirm Account Number * :
Routing Number * :
Confirm Routing Number * :
Financial % Institution :
Account Type * : ● Checking ○ Savings
Payment Date * : ● Every Month 10th ○ Every Month 25th
☐ I accept the terms and conditions

1. Select ***View/Update Invoice***, menu option
2. Select ***Manage Payment Method***, button at bottom of screen.
3. Select ***Account Description***, for Subgroup you want to update
4. Select ***Subgroup*** or ***Multiple Subgroups***, that will use the same Account Information
    1. Select >>, double arrows pointing right to **Add**
    2. Select <<, double arrows pointing left to **Remove**

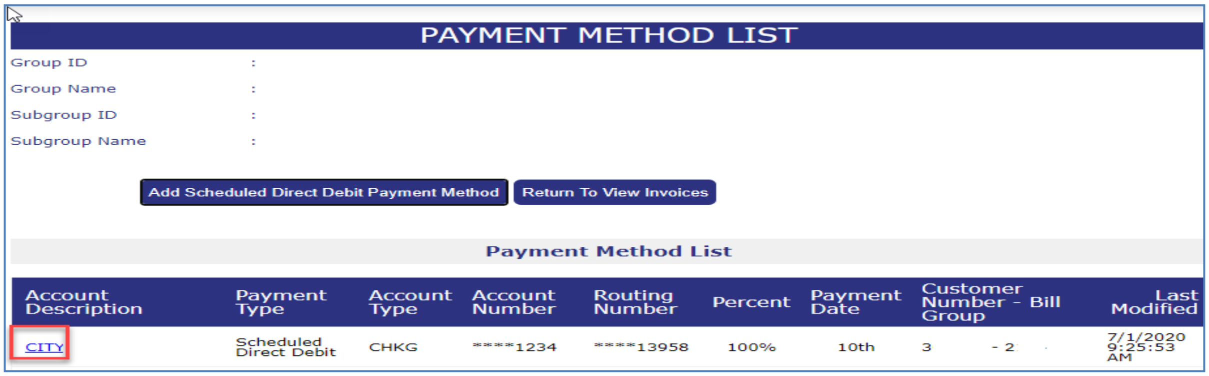
Continued next page...

Scheduled Direct Debit ACH – Update Account (cont.)

5. Enter All Required Fields, (if incorrect Routing number entered more than two times, prompted to try again later or at another time)
   - Routing Number
   - Bank Name (will auto populate after valid routing number has been entered
   - Account Name
   - Account Number
   - Confirm Account Number
   - Account Type
   - Payment Date
6. Select Click box next to **"I Accept the terms and conditions" link**, read and review then close page or you may return to eAdministrative URL tab.
7. Click **Check box** next to "I Accept the Terms and Condition"
8. Select **Update Account**

Scheduled Direct Debit ACH – Cancel Account

*Allowed three transaction daily, any combination of **"Add, Update or Cancel"**.

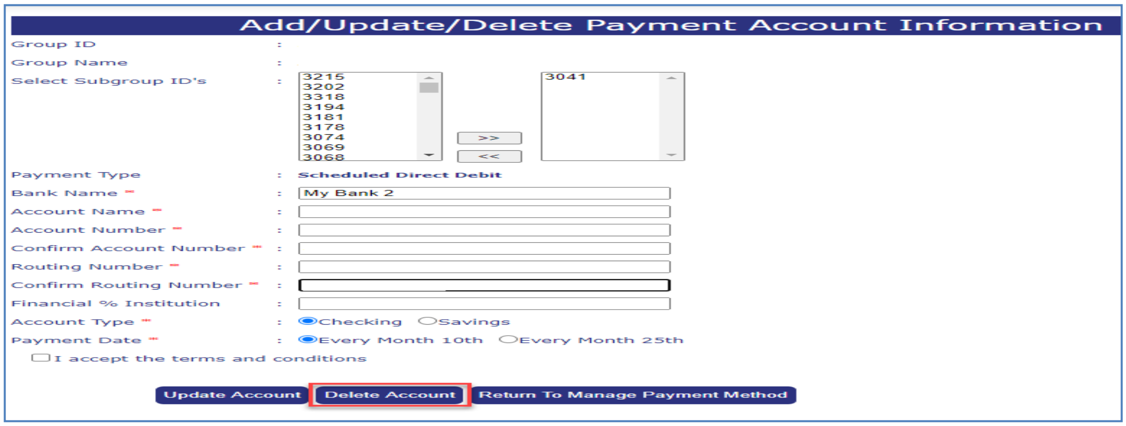


PAYMENT METHOD LIST

Group ID :
Group Name :
Subgroup ID :
Subgroup Name :

Payment Method List

Account Description	Payment Type	Account Type	Account Number	Routing Number	Percent	Payment Date	Customer Number - Bill Group	Last Modified
CITY	Scheduled Direct Debit	CHKG	****1234	****13958	100%	10th	3 - 2	7/1/2020 9:25:53 AM



Add/Update/Delete Payment Account Information

Group ID :
Group Name :
Select Subgroup ID's : 3215 3202 3318 3194 3181 3178 3074 3069 3068 | 3041

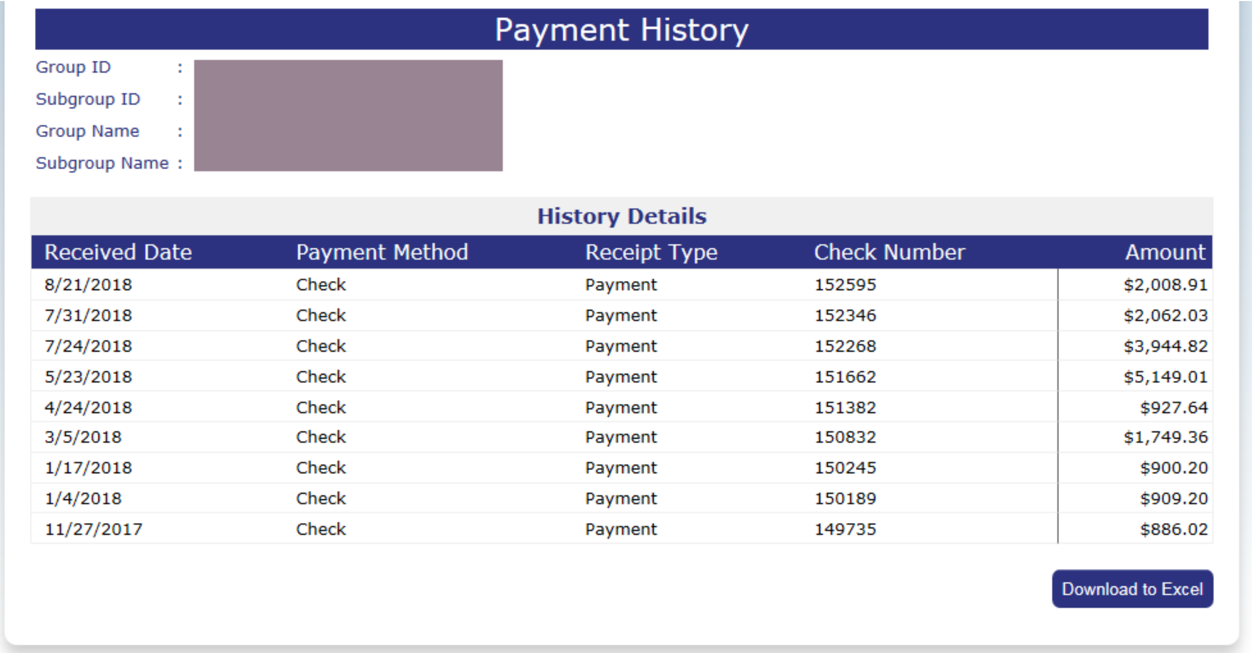
Payment Type : Scheduled Direct Debit
Bank Name * : My Bank 2
Account Name * :
Account Number * :
Confirm Account Number * :
Routing Number * :
Confirm Routing Number * :
Financial % Institution :
Account Type * : ● Checking ○ Savings
Payment Date * : ● Every Month 10th ○ Every Month 25th
☐ I accept the terms and conditions

Continued next page...

Scheduled Direct Debit ACH – Cancel Account (cont.)

1. Select ***View/Update Invoice***, menu option
2. Select ***Manage Payment Method***, button at bottom of screen.
3. Select ***Account Description***, for Subgroup you want to Cancel
4. Select ***Subgroup*** or ***Multiple Subgroups***,
    a. Select >>, double arrows pointing right to **Add**
    b. Select <<, double arrows pointing left to **Remove**
5. Select Click box next to **"I Accept the terms and conditions" link**, read and review then close page or you may return to eAdministrative URL tab.
6. Click **Check box** next to "I Accept the Terms and Condition"
7. Select **Delete Account**

Section 7: Payment History



Payment History

Group ID :
Subgroup ID :
Group Name :
Subgroup Name :
[redacted]

History Details

Received Date	Payment Method	Receipt Type	Check Number	Amount
8/21/2018	Check	Payment	152595	$2,008.91
7/31/2018	Check	Payment	152346	$2,062.03
7/24/2018	Check	Payment	152268	$3,944.82
5/23/2018	Check	Payment	151662	$5,149.01
4/24/2018	Check	Payment	151382	$927.64
3/5/2018	Check	Payment	150832	$1,749.36
1/17/2018	Check	Payment	150245	$900.20
1/4/2018	Check	Payment	150189	$909.20
11/27/2017	Check	Payment	149735	$886.02

Payment History

To review the payment history for your subgroup, please follow these steps:

1. Click on the **Payment History** menu option at the top of the WELCOME TO LIST BILL screen.
2. The **PAYMENT HISTORY** screen opens.
3. Click **<Download to Excel >** to load the information into a Microsoft Excel spreadsheet.
4. Click on the date link under the RECEIVED DATE column to open the **RECEIPT DETAIL** screen.

Continued next page...

Payment History (cont.)

5. Review the receipt detail for the specified received date.
6. Click **<Return to Payment History>** to close the screen and return to the PAYMENT HISTORY screen.

If you have any questions regarding your payment history, please contact the billing department at 1-866-322-1210. At the prompt, select #1 for billing issues.

CHAPTER 4: SELF BILL E-BILL PROCESSING

PURPOSE

This chapter provides detailed information regarding our online billing for Self Billed groups.

UnitedHealthcare Specialty Benefits will set up your access level according to the current number of invoices sent out for your group. You may be set up on the group level, which gives you access to all subgroups within your group, or at the subgroup level, which gives you access to one or more subgroups within your group.

Example of Group & Subgroup hierarchy:

Group = ABC Company
Subgroup 1001 = ABC Company Miami, Florida
Subgroup 1002 = ABC Company New York, New York
Subgroup 1003 = ABC Company Los Angeles, California

BEFORE YOU BEGIN

Login to the e-Bill Services system by following the steps in **Chapter 2: E-Bill Services System, Section 1: Access e-Bill Services**.

IN THIS CHAPTER

The following sections are included in this chapter:

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Section 1: Update Invoice

PURPOSE

This section provides detailed information about updating a Self Bill invoice.

You will receive an e-mail from UnitedHealthcare Specialty Benefits usually on the first business day after the 15th of each month stating that the latest invoice, including all subgroup information, is ready for your review and update. At that time you will be able to access the invoice on the e-Bill system.

If you do not receive an invoice by the first business day after the 15th of the month, please wait at least until the 19th of the month before contacting UnitedHealthcare Specialty Benefits billing department at 1-866-322-1210. At the prompt, select #1 for billing issues.

IN THIS SECTION

The following topics are included in this section:

Below is a sample of the billing notification email:

BEFORE YOU BEGIN Login to the e-Bill Services system.

List Bill

INVOICE NOTICE - UHC Financial Protection Benefits, Group ID:

Reference Group Name:
Group ID: Group Effective Date: **08/01/2009**

Dear

Your UHC Financial Protection Benefits (which may include some or all of the following: Life, Disability, Critical Illness, Accident, Hospital Indemnity, Family Medical Leave of Absence) **September** Invoice is now available to access on our "UnitedHealthcare Financial Protection" website at www.uhcfinancialprotection.com and Due by **09/01/2020**, please refer to the instructions below.

As a "List Bill" Group, please be sure to perform essential steps outlined below when submitting your payment, which will ensure the Subgroup account remains current.

Make Payment to UHC
Option 1) Mail Payment to: **UnitedHealthcare PO Box 860511 Minneapolis, MN 55486-0511**
Option 2) Wire Transfer or Online ACH Payment (If currently setup)*

Subgroup Subscriber Invoice
Review Subgroup Invoice for Subscriber or Member Accuracy and if any Questions please Contact our **"Billing Support"** Team.

Subgroup Name	Subgroup ID	Invoice Number	Premium Due Date	Amount Due
			09/01/2020	$3,391.23
			TOTAL AMOUNT DUE:	$3,391.23

If you have already mailed or submitted your payment, please disregard this notice.

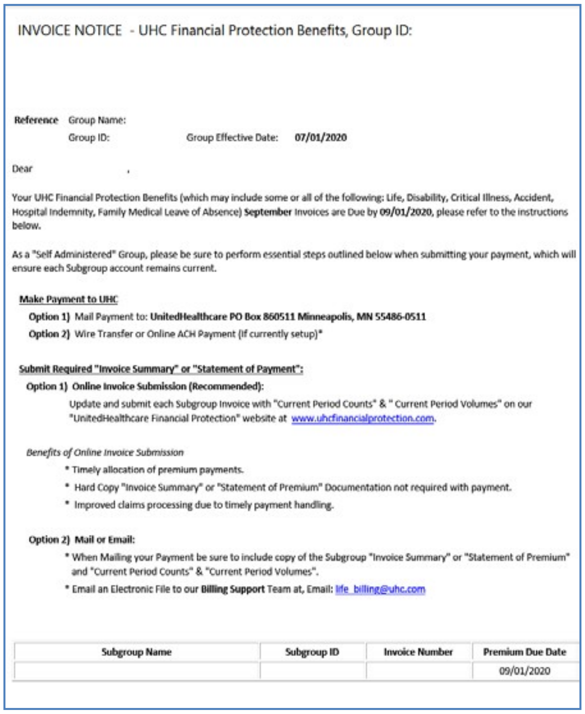
Please contact our **"Billing Support"** Team for further assistance or questions regarding this email at,
Phone: 1-866-322-1210, Option 1 or **Email:** life_billing@uhc.com

***Note:** If you are interested in Wire Transfers or Online ACH Payment options, feel free to contact us.

Thank you for your time and attention, we value our customers and look forward to continuing to serve you.

*Please **Do Not Reply** to this message, this email is not monitored and you will not receive a response.*

Self Bill



INVOICE NOTICE - UHC Financial Protection Benefits, Group ID:

Reference Group Name:
Group ID: Group Effective Date: **07/01/2020**

Dear ,

Your UHC Financial Protection Benefits (which may include some or all of the following: Life, Disability, Critical Illness, Accident, Hospital Indemnity, Family Medical Leave of Absence) **September** Invoices are Due by **09/01/2020**, please refer to the instructions below.

As a "Self Administered" Group, please be sure to perform essential steps outlined below when submitting your payment, which will ensure each Subgroup account remains current.

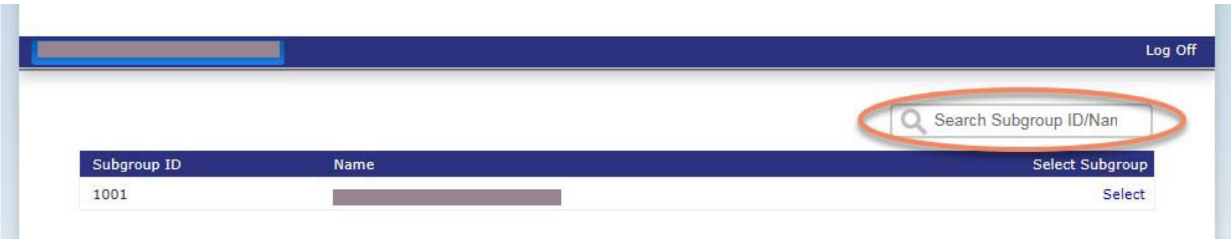
Make Payment to UHC
Option 1) Mail Payment to: **UnitedHealthcare PO Box 860511 Minneapolis, MN 55486-0511**
Option 2) Wire Transfer or Online ACH Payment (If currently setup)*

Submit Required "Invoice Summary" or "Statement of Payment":
Option 1) Online Invoice Submission (Recommended):
Update and submit each Subgroup Invoice with "Current Period Counts" & " Current Period Volumes" on our "UnitedHealthcare Financial Protection" website at www.uhcfinancialprotection.com.

Benefits of Online Invoice Submission
* Timely allocation of premium payments.
* Hard Copy "Invoice Summary" or "Statement of Premium" Documentation not required with payment.
* Improved claims processing due to timely payment handling.

Option 2) Mail or Email:
* When Mailing your Payment be sure to include copy of the Subgroup "Invoice Summary" or "Statement of Premium" and "Current Period Counts" & "Current Period Volumes".
* Email an Electronic File to our **Billing Support** Team at, Email: life_billing@uhc.com

Subgroup Name	Subgroup ID	Invoice Number	Premium Due Date
			09/01/2020



Subgroup ID	Name	Select Subgroup
1001	[redacted]	Select

Search for Subgroups

To open the WELCOME TO BILLING screen, please follow these steps:

1. When you have successfully logged into the e-Bill Services system the Search for Subgroups screen opens.
2. Click on the Subgroup ID or Subgroup Name to open the WELCOME TO BILLING screen.

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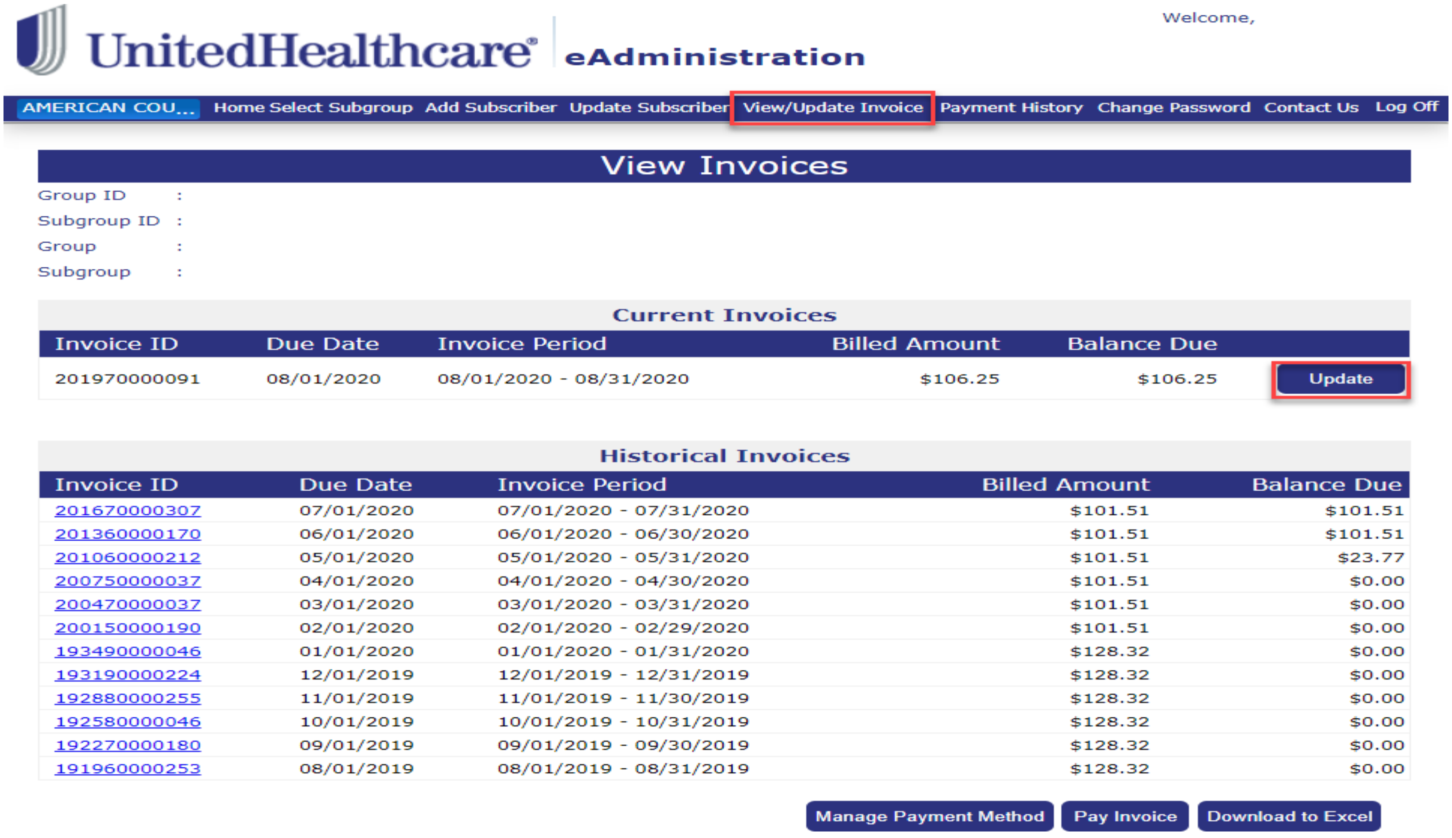

View Invoices

Group ID :
Subgroup ID :
Group :
Subgroup :

Current Invoices

Invoice ID	Due Date	Invoice Period	Billed Amount	Balance Due	
201970000091	08/01/2020	08/01/2020 - 08/31/2020	$106.25	$106.25	Update

Historical Invoices

Invoice ID	Due Date	Invoice Period	Billed Amount	Balance Due
201670000307	07/01/2020	07/01/2020 - 07/31/2020	$101.51	$101.51
201360000170	06/01/2020	06/01/2020 - 06/30/2020	$101.51	$101.51
201060000212	05/01/2020	05/01/2020 - 05/31/2020	$101.51	$23.77
200750000037	04/01/2020	04/01/2020 - 04/30/2020	$101.51	$0.00
200470000037	03/01/2020	03/01/2020 - 03/31/2020	$101.51	$0.00
200150000190	02/01/2020	02/01/2020 - 02/29/2020	$101.51	$0.00
193490000046	01/01/2020	01/01/2020 - 01/31/2020	$128.32	$0.00
193190000224	12/01/2019	12/01/2019 - 12/31/2019	$128.32	$0.00
192880000255	11/01/2019	11/01/2019 - 11/30/2019	$128.32	$0.00
192580000046	10/01/2019	10/01/2019 - 10/31/2019	$128.32	$0.00
192270000180	09/01/2019	09/01/2019 - 09/30/2019	$128.32	$0.00
191960000253	08/01/2019	08/01/2019 - 08/31/2019	$128.32	$0.00

Update Invoice

1. Click **View/Update Invoice** menu option to open the VIEW INVOICES screen.
2. The VIEW INVOICES screen shows both current (unapproved) and historical (approved) invoices.
3. Click the **Update** button to view and update the oldest unapproved/current invoice. The oldest invoice that has not been processed must be updated and approved before you can view and update the current month.

> **Important:** Any changes made to the oldest current invoice will not be reflected in the next month's invoice if invoices have already been created.
>
> Any new invoices that are created by the system will use the data of the last approved invoice as a reference.
>
> The oldest unapproved invoice is the only invoice that will have the **Update** option.

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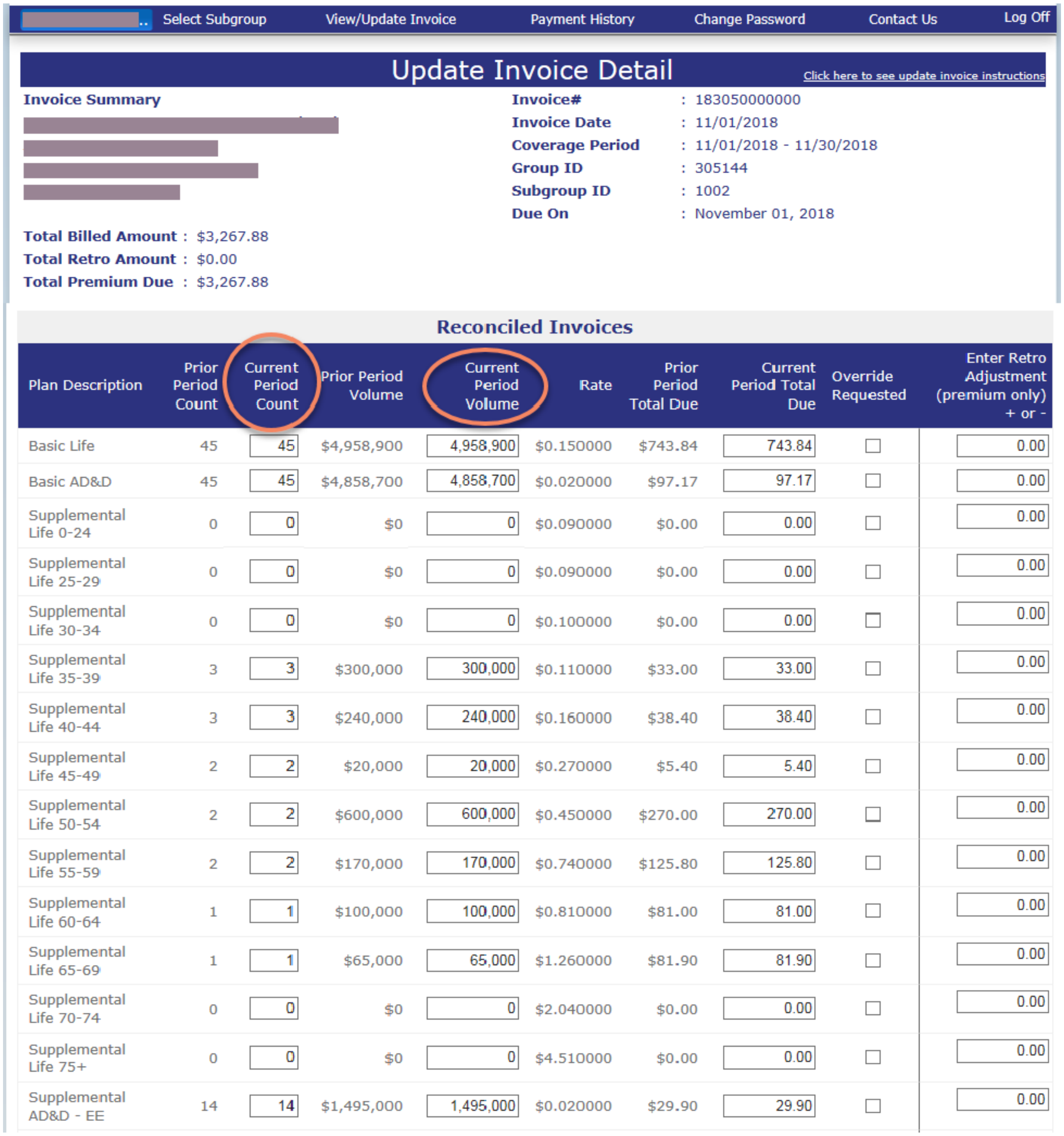

Update Invoice Detail

Click here to see update invoice instructions

Invoice Summary

[redacted]

Invoice# : 183050000000
Invoice Date : 11/01/2018
Coverage Period : 11/01/2018 - 11/30/2018
Group ID : 305144
Subgroup ID : 1002
Due On : November 01, 2018

Total Billed Amount : $3,267.88
Total Retro Amount : $0.00
Total Premium Due : $3,267.88

Reconciled Invoices

Plan Description	Prior Period Count	Current Period Count	Prior Period Volume	Current Period Volume	Rate	Prior Period Total Due	Current Period Total Due	Override Requested	Enter Retro Adjustment (premium only) + or -
Basic Life	45	45	$4,958,900	4,958,900	$0.150000	$743.84	743.84	☐	0.00
Basic AD&D	45	45	$4,858,700	4,858,700	$0.020000	$97.17	97.17	☐	0.00
Supplemental Life 0-24	0	0	$0	0	$0.090000	$0.00	0.00	☐	0.00
Supplemental Life 25-29	0	0	$0	0	$0.090000	$0.00	0.00	☐	0.00
Supplemental Life 30-34	0	0	$0	0	$0.100000	$0.00	0.00	☐	0.00
Supplemental Life 35-39	3	3	$300,000	300,000	$0.110000	$33.00	33.00	☐	0.00
Supplemental Life 40-44	3	3	$240,000	240,000	$0.160000	$38.40	38.40	☐	0.00
Supplemental Life 45-49	2	2	$20,000	20,000	$0.270000	$5.40	5.40	☐	0.00
Supplemental Life 50-54	2	2	$600,000	600,000	$0.450000	$270.00	270.00	☐	0.00
Supplemental Life 55-59	2	2	$170,000	170,000	$0.740000	$125.80	125.80	☐	0.00
Supplemental Life 60-64	1	1	$100,000	100,000	$0.810000	$81.00	81.00	☐	0.00
Supplemental Life 65-69	1	1	$65,000	65,000	$1.260000	$81.90	81.90	☐	0.00
Supplemental Life 70-74	0	0	$0	0	$2.040000	$0.00	0.00	☐	0.00
Supplemental Life 75+	0	0	$0	0	$4.510000	$0.00	0.00	☐	0.00
Supplemental AD&D - EE	14	14	$1,495,000	1,495,000	$0.020000	$29.90	29.90	☐	0.00

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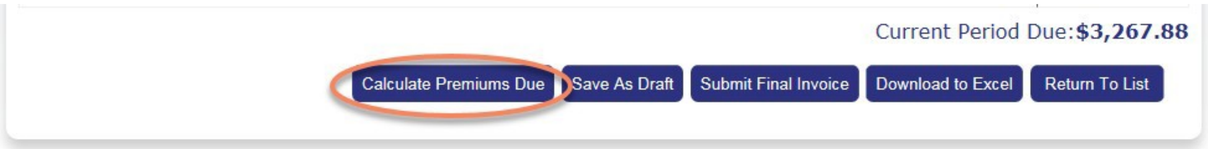
© *UnitedHealthcare Specialty Benefits* 11/20

Update Invoice (cont.)

4. The **Update Invoice Detail** screen opens. Amounts in the Prior information columns are populated from the last approved invoice.
5. Click on the CURRENT PERIOD COUNT field for each plan description and type in the correct count amount, if necessary.
6. Click on the CURRENT PERIOD VOLUME field for each plan description and type in the correct volume (or benefit) amount, if necessary.
7. Click **<Calculate Premiums Due>at the bottom of the screen**.


Current Period Due: **$3,267.88**

The system will calculate the CURRENT PERIOD TOTAL DUE amount for each plan description and the **CURRENT PERIOD DUE** amount at the bottom of the screen.

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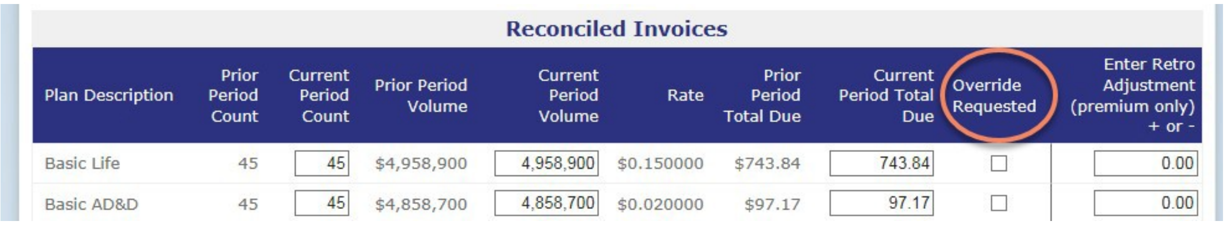

Reconciled Invoices

Plan Description	Prior Period Count	Current Period Count	Prior Period Volume	Current Period Volume	Rate	Prior Period Total Due	Current Period Total Due	Override Requested	Enter Retro Adjustment (premium only) + or -
Basic Life	45	45	$4,958,900	4,958,900	$0.150000	$743.84	743.84	☐	0.00
Basic AD&D	45	45	$4,858,700	4,858,700	$0.020000	$97.17	97.17	☐	0.00

Update Invoice (cont.)

8. Click on the checkbox under the OVERRIDE REQUEST column for the Plan Description only if one of the following circumstances applies:
   - **Rounding issues –**

     The **Current Period Due** amount calculated incorrectly due to rounding issues.

     The **Current Period Total Due** amounts for each plan row are rounded up or down for each plan.

     The **Current Period Due** amount displayed at the bottom is calculated by adding the plan rows first, and then rounding the total up or down. This may result in the **Current Period Due** being off by $0.01.

     To calculate the correct **Current Period Due** amount, check the **Override Request** checkbox and click **<Calculate Premium Due>** again.

     The system will add the plan rows together as displayed and the **Current Period Due** amount will be correct.

     If the Override request checkbox is not selected, the system will calculate the **Current Period Due** amount as before and the incorrect **Current Period Due** amount may be saved or submitted.
   - **Age banded groups –**

     The group/subgroup has age banded products that are collapsed into one product category. Total all **Current Period Counts**, **Current Period Volumes** and **Current Period Total Due** amounts and enter them in the appropriate current period column.

     Click on the OVERRIDE REQUEST checkbox and click on **<Calculate Premium Due>**.

     The system will calculate the Current Period Due amount correctly.

Important: In this situation, the rates in our system should not be used to calculate the premium due; the check box should be left selected. It is **very important** that you do not unselect this check box.

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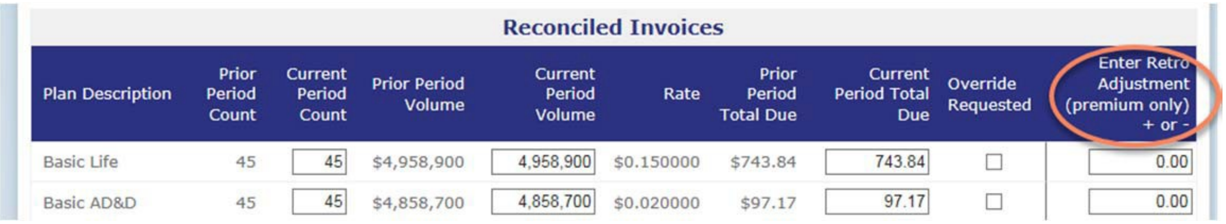
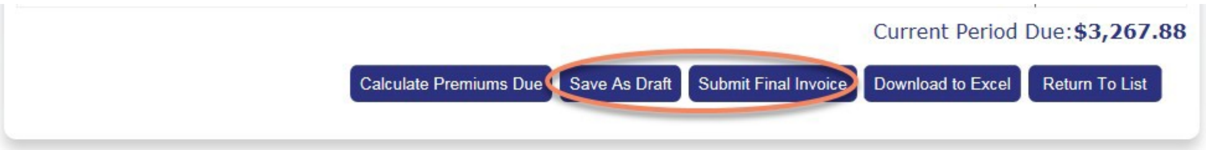


Reconciled Invoices

Plan Description	Prior Period Count	Current Period Count	Prior Period Volume	Current Period Volume	Rate	Prior Period Total Due	Current Period Total Due	Override Requested	Enter Retro Adjustment (premium only) + or -
Basic Life	45	45	$4,958,900	4,958,900	$0.150000	$743.84	743.84	☐	0.00
Basic AD&D	45	45	$4,858,700	4,858,700	$0.020000	$97.17	97.17	☐	0.00

Update Invoice (cont.)

9. Enter any retroactive prior premium adjustment amounts for any plan description row in the ENTER RETRO ADJUSTMENT column. The retroactive adjustment is made only to the prior period(s).
10. Complete the update by clicking on one of the following buttons at the bottom of the screen:



Current Period Due:**$3,267.88**

- **Save As Draft:** To save the update and finish at a later date. The invoice will still be available for updates, and will remain under the CURRENT INVOICE section of the View Invoice screen. The invoice will <u>not</u> be approved for payment.
- **Submit Final Invoice:** To submit the invoice for payment. The invoice will no longer be available for updates, and will be listed under the HISTORICAL INVOICE section of the **VIEW INVOICE** screen. The invoice will be approved for payment.

11. Click **<Download to Excel >** to download the screen data to a Microsoft Excel spreadsheet. You will be able to save the invoice for your records or print it.
12. Click **<Return to List>** to return to the **VIEW INVOICES** screen.

Section 2: View Historical Invoices

This section provides detailed information regarding historical invoices. These invoices have been updated and approved for payment, and can no longer be updated. They can be either paid or unpaid invoices.

Group ID :
Subgroup ID :
Group :
Subgroup :

Current Invoices

Invoice ID	Due Date	Invoice Period	Billed Amount	Balance Due	
201970000091	08/01/2020	08/01/2020 - 08/31/2020	$106.25	$106.25	Update

Historical Invoices

Invoice ID	Due Date	Invoice Period	Billed Amount	Balance Due
201670000307	07/01/2020	07/01/2020 - 07/31/2020	$101.51	$101.51
201360000170	06/01/2020	06/01/2020 - 06/30/2020	$101.51	$101.51
201060000212	05/01/2020	05/01/2020 - 05/31/2020	$101.51	$23.77
200750000037	04/01/2020	04/01/2020 - 04/30/2020	$101.51	$0.00
200470000037	03/01/2020	03/01/2020 - 03/31/2020	$101.51	$0.00
200150000190	02/01/2020	02/01/2020 - 02/29/2020	$101.51	$0.00
193490000046	01/01/2020	01/01/2020 - 01/31/2020	$128.32	$0.00
193190000224	12/01/2019	12/01/2019 - 12/31/2019	$128.32	$0.00
192880000255	11/01/2019	11/01/2019 - 11/30/2019	$128.32	$0.00
192580000046	10/01/2019	10/01/2019 - 10/31/2019	$128.32	$0.00
192270000180	09/01/2019	09/01/2019 - 09/30/2019	$128.32	$0.00
191960000253	08/01/2019	08/01/2019 - 08/31/2019	$128.32	$0.00

View Invoices

To view the invoice detail for an historical invoice, please follow these steps:

1. Click on the **View/Update Invoice** option.
2. The **View Invoice** screen will appear and display a listing of current and historical invoices.
3. Historical invoices are defined as approved invoices and cannot be updated. However, you are able to review the details of approved invoices.
4. Click on a HISTORICAL invoice id to open the **Invoice Detail** screen. You will be able to view the invoice summary information for the selected invoice id.

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Reconciled Invoices

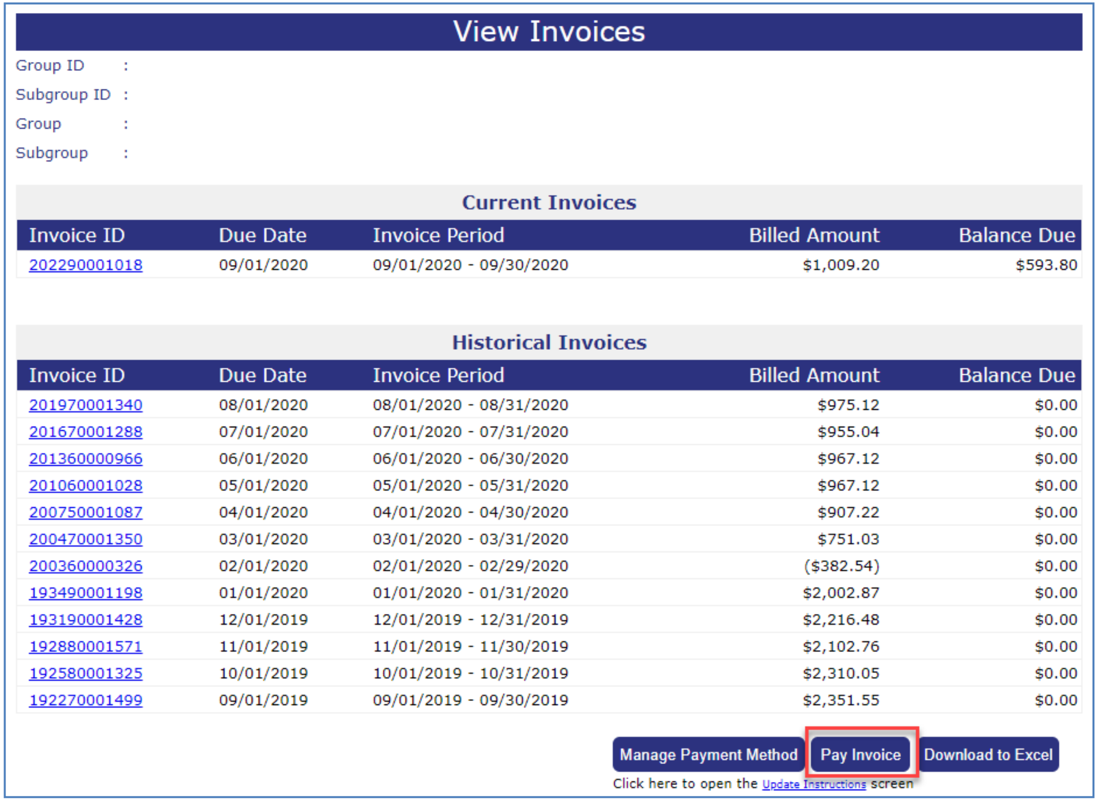
Plan Description	Current Period Count	Current Period Volume	Rate	Current Period Total Due	Retro
Basic Life	45	$4,858,700	$0.1500	$728.80	$27.00
Basic AD&D	45	$4,858,700	$0.0200	$99.23	$0.00
Supplemental Life 35-39	3	$300,000	$0.1100	$33.00	$0.00
Supplemental Life 40-44	3	$240,000	$0.1600	$38.40	$0.00
Supplemental Life 45-49	2	$20,000	$0.2700	$5.40	$0.00
Supplemental Life 50-54	2	$600,000	$0.4500	$270.00	$0.00
Supplemental Life 55-59	2	$170,000	$0.7400	$125.80	$0.00
Supplemental Life 60-64	1	$100,000	$0.8100	$81.00	$0.00
Supplemental Life 65-69	1	$65,000	$1.2600	$81.90	$0.00
Supplemental AD&D - EE	14	$1,495,000	$0.0200	$29.90	$0.00
Supplemental Dependent Life 35-39	1	$25,000	$0.1100	$2.75	$0.00
Supplemental Dependent Life 40-44	3	$95,000	$0.1600	$15.20	$0.00
Supplemental Dependent Life 45-49	1	$5,000	$0.2700	$1.35	$0.00
Supplemental Dependent Life 50-54	2	$50,000	$0.4500	$22.50	$0.00
Supplemental Dependent Life 60-64	1	$50,000	$0.8100	$40.50	$0.00
Supplemental Dependent Life 65-69	1	$32,500	$1.2600	$40.95	$0.00
Supplemental Dependent AD&D - Spouse	9	$257,500	$0.0200	$5.15	$0.00
Supplemental Dependent Life - Child	3	$30,000	$0.1200	$3.60	$0.00
Supplemental Dependent AD&D - Children	30	$30,000	$0.0200	$0.60	$0.00
Short Term Disability	42	$44,826	$0.1500	$672.39	$0.00
Long Term Disability	42	$318,826	$0.3000	$956.48	$0.00

Invoice Detail

The Invoice Detail screen opens to display detailed information for the historical invoice selected. You will be able to print the screen or download the invoice details to a Microsoft Excel workbook.

- To print the screen click on the Microsoft Internet Explorer print icon to send it to the printer.
- Or, select the File, Print menu option to open the print dialog box.
- To export the screen information to a Microsoft Excel workbook, click **<Download to Excel >**. You may then reformat the columns, manipulate the data and/or save the spreadsheet to a specified file location. For a hard copy of the invoice details, print the spreadsheet.
- To close the **INVOICE DETAIL** screen and return to the **VIEW INVOICE** screen, click **<Return to List>**.

Section 3: Pay Invoice



View Invoices

Group ID :
Subgroup ID :
Group :
Subgroup :

Current Invoices

Invoice ID	Due Date	Invoice Period	Billed Amount	Balance Due
202290001018	09/01/2020	09/01/2020 - 09/30/2020	$1,009.20	$593.80

Historical Invoices

Invoice ID	Due Date	Invoice Period	Billed Amount	Balance Due
201970001340	08/01/2020	08/01/2020 - 08/31/2020	$975.12	$0.00
201670001288	07/01/2020	07/01/2020 - 07/31/2020	$955.04	$0.00
201360000966	06/01/2020	06/01/2020 - 06/30/2020	$967.12	$0.00
201060001028	05/01/2020	05/01/2020 - 05/31/2020	$967.12	$0.00
200750001087	04/01/2020	04/01/2020 - 04/30/2020	$907.22	$0.00
200470001350	03/01/2020	03/01/2020 - 03/31/2020	$751.03	$0.00
200360000326	02/01/2020	02/01/2020 - 02/29/2020	($382.54)	$0.00
193490001198	01/01/2020	01/01/2020 - 01/31/2020	$2,002.87	$0.00
193190001428	12/01/2019	12/01/2019 - 12/31/2019	$2,216.48	$0.00
192880001571	11/01/2019	11/01/2019 - 11/30/2019	$2,102.76	$0.00
192580001325	10/01/2019	10/01/2019 - 10/31/2019	$2,310.05	$0.00
192270001499	09/01/2019	09/01/2019 - 09/30/2019	$2,351.55	$0.00

Click here to open the Update Instructions screen

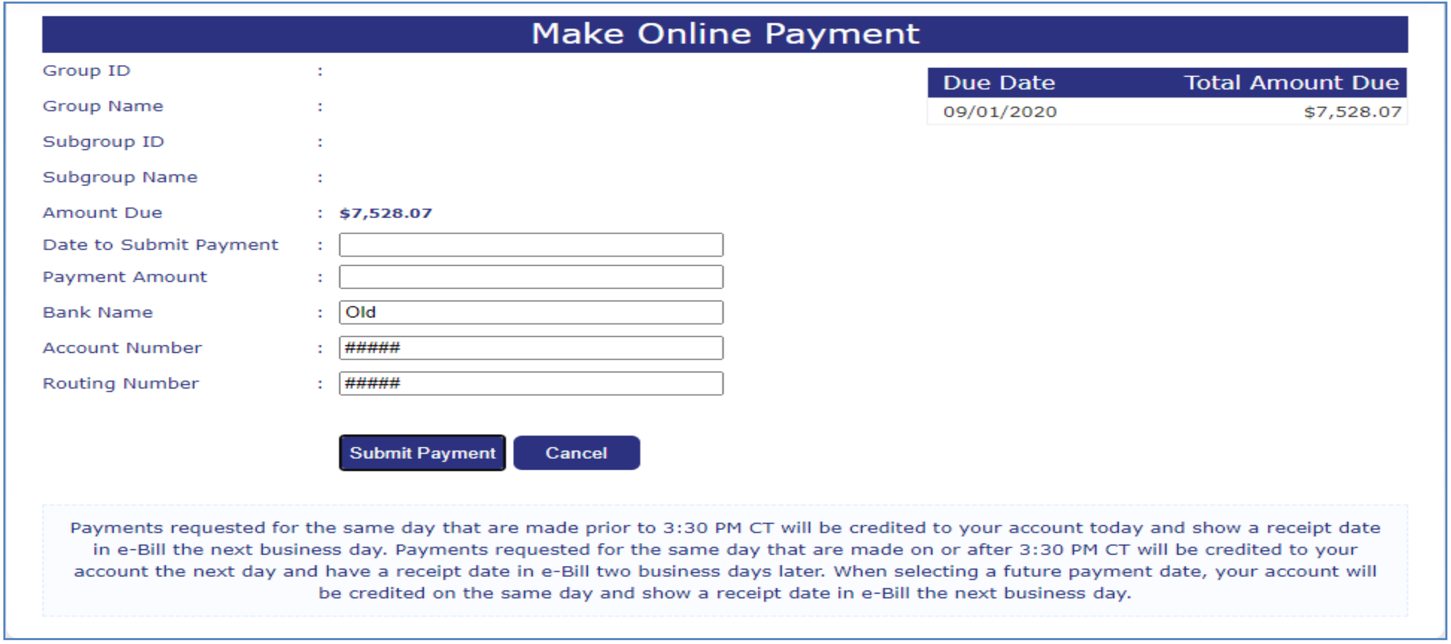
Payment Options

The **Pay Invoice** button is at the bottom of the **VIEW INVOICE** screen. After you have updated your invoice and submitted the invoice as final, you will notice that the invoice you have updated and approved appears at the top of the **Historical Invoices** list.

To pay your invoice, please follow these steps:

1. Click on the **View/Update Invoice** menu option at the top of the screen to open the **VIEW INVOICES** screen.
2. Click **<Pay Invoice>** to open the **PAYMENT OPTIONS** screen.
3. The **PAYMENT OPTIONS** screen and displays the group/subgroup id and name and premium **Amount Due** dollar amount.
4. Click on one of the following payment options:
   - **Print Remittance Form** to pay by check.
   - **Make Online Payment** to pay online, using e-Bill's secured screens.
   - **Scheduled Direct Debit ACH** to scheduled month based upon "Payment Date" selection during the setup process, on either the 10th or the 25th calendar day of the month.

Important: The invoice must be submitted as final before payment can be posted.

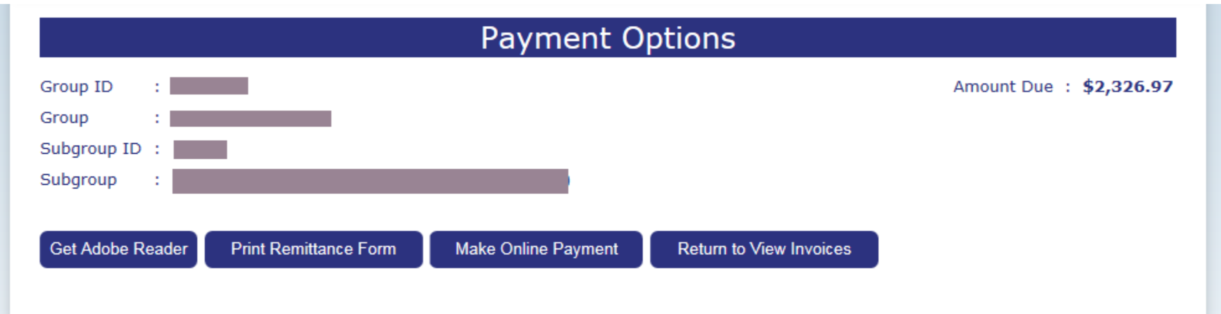


Make Online Payment

Due Date	Total Amount Due
09/01/2020	$7,528.07

Group ID :
Group Name :
Subgroup ID :
Subgroup Name :
Amount Due : **$7,528.07**
Date to Submit Payment :
Payment Amount :
Bank Name : Old
Account Number : #####
Routing Number : #####

Payments requested for the same day that are made prior to 3:30 PM CT will be credited to your account today and show a receipt date in e-Bill the next business day. Payments requested for the same day that are made on or after 3:30 PM CT will be credited to your account the next day and have a receipt date in e-Bill two business days later. When selecting a future payment date, your account will be credited on the same day and show a receipt date in e-Bill the next business day.



Payment Options

Group ID : [redacted]
Group : [redacted]
Subgroup ID : [redacted]
Subgroup : [redacted]
Amount Due : **$2,326.97**

Pay by check

To pay with a check, please follow these steps:

1. Click **<Pay Invoice>** on the **UPDATE INVOICE** screen to open the **PAYMENT OPTIONS** screen.
2. Click **<Print Remittance Form>**.
3. The Premium Invoice Remittance Summary appears as a Portable Document Format (PDF).

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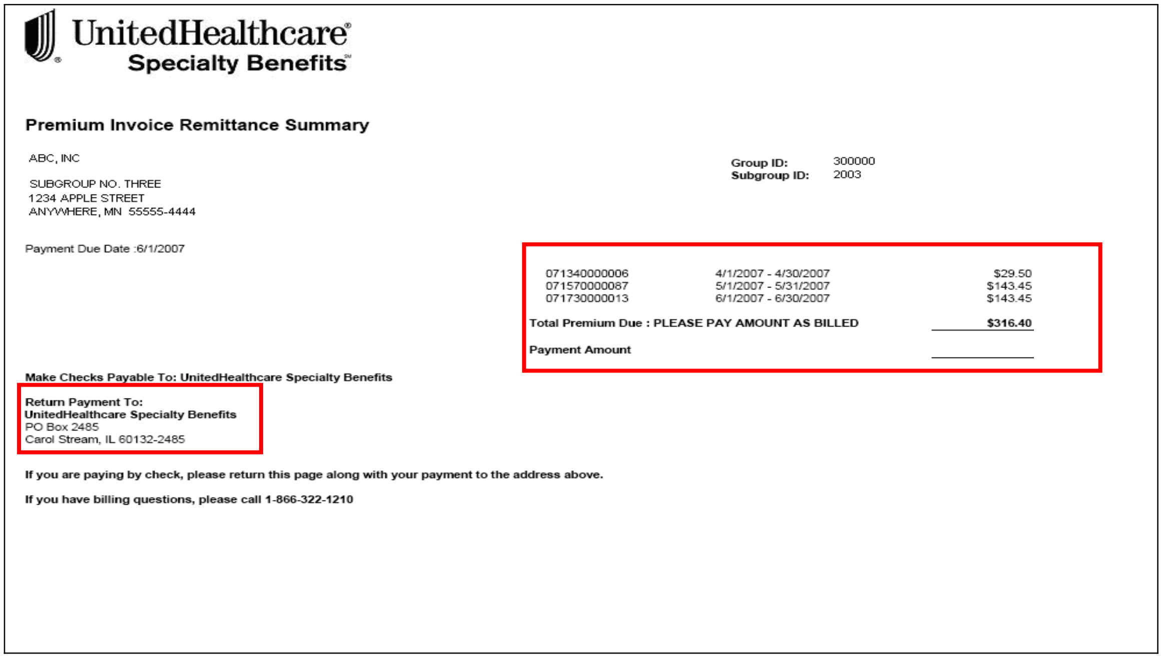


UnitedHealthcare Specialty Benefits

Premium Invoice Remittance Summary

ABC, INC

SUBGROUP NO. THREE
1234 APPLE STREET
ANYWHERE, MN 55555-4444

Group ID: 300000
Subgroup ID: 2003

Payment Due Date :6/1/2007

071340000006	4/1/2007 - 4/30/2007	$29.50
071570000087	5/1/2007 - 5/31/2007	$143.45
071730000013	6/1/2007 - 6/30/2007	$143.45
Total Premium Due : PLEASE PAY AMOUNT AS BILLED		**$316.40**
Payment Amount		

Make Checks Payable To: UnitedHealthcare Specialty Benefits

Return Payment To:
UnitedHealthcare Specialty Benefits
PO Box 2485
Carol Stream, IL 60132-2485

If you are paying by check, please return this page along with your payment to the address above.

If you have billing questions, please call 1-866-322-1210

Note: You must have Adobe Acrobat Reader installed on your computer to view and print the remittance form.

Pay by check (cont.)

4. The remittance summary will display all the invoices that are currently approved and unpaid in the following format:
   - Invoice Number
   - Coverage Period
   - Invoice Amount Due
   - Total Premium Due
5. Print the remittance summary in landscape and be sure to enclose it with your payment.
6. To print the Remittance Summary, click on the printer icon at the top of the Adobe Acrobat Reader toolbar.
7. Make checks payable to UnitedHealthcare Specialty Benefits and mail your payment to the address provided at the bottom of the invoice.

Continued next page…

Pay by check (cont.)

8. Or, for **Overnight payments** use the following address:

UnitedHealthcare Specialty Benefits 2485
C/O Citibank Lockbox Operations
8430 W. Bryn Mawr Avenue, 3rd Floor
Chicago, IL 60631

9. To close the Adobe Acrobat Reader window click on the "X" at the top right-hand side of the toolbar.
10. Or, select the FILE option at the top of the screen, then select the CLOSE menu option.

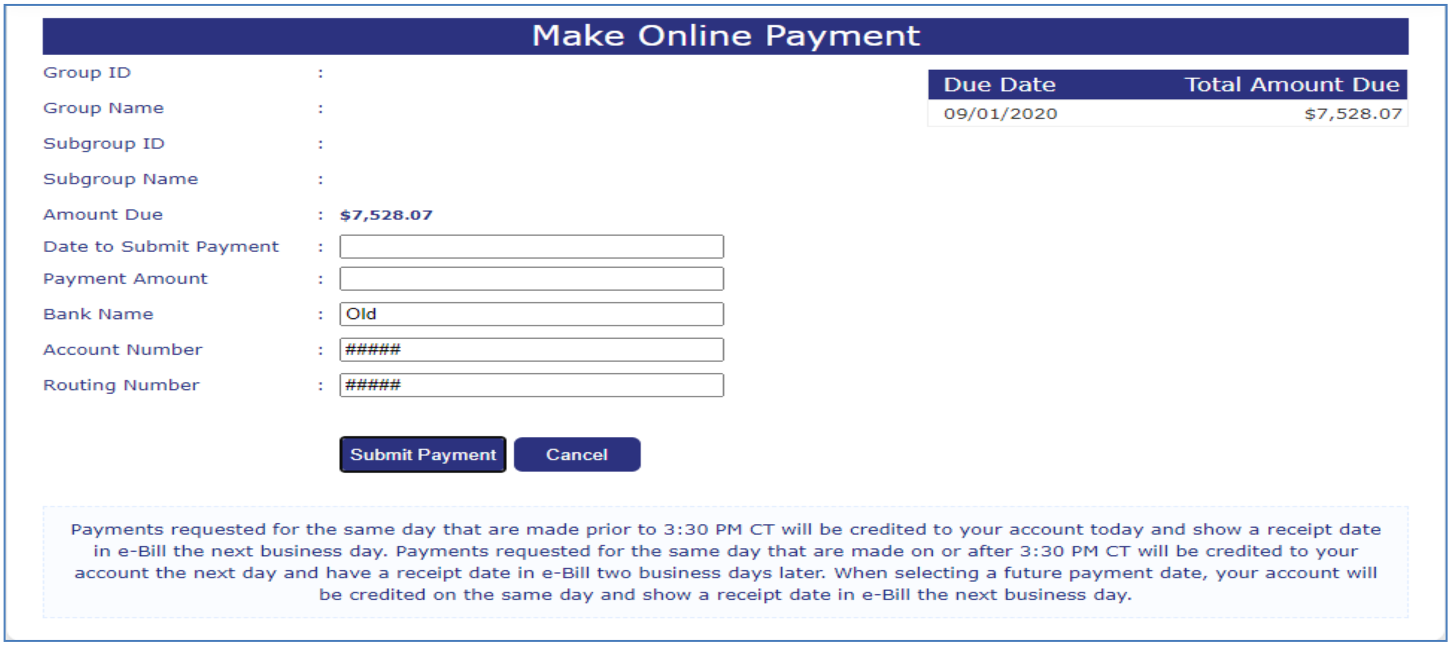
Important Note: To avoid delays in posting your payment to your account, do not mail your payment to our street address. All address information is also contained in the **CONTACT US** screen.

Make Online Payment

To pay online, please follow these steps:

1. Click **<Pay Invoice>** on the **UPDATE INVOICE** screen to open the **PAYMENT OPTIONS** screen.
2. Click **<Make Online Payment>** to open the secured online payment screen.

> **Important Note:** To make an electronic payment, the Electronic Payment Authorization Form must be completed, signed and mailed to the UnitedHealthcare Specialty Benefits billing department. See **Chapter 5: Forms Library System, Topic: Electronic Payment Authorization Form** for instructions on obtaining a copy of the form. The address to send the form is located in the **Contact Us** menu item. You will need to provide the following account information:
>
> - Bank Name, Address and Phone
> - Bank Routing Number
> - Your Account Name, Number and Type
> - Authorized Signer Name, Phone Number and email address



Make Online Payment

Group ID :
Group Name :
Subgroup ID :
Subgroup Name :
Amount Due : $7,528.07
Date to Submit Payment :
Payment Amount :
Bank Name : Old
Account Number : #####
Routing Number : #####

Due Date	Total Amount Due
09/01/2020	$7,528.07

Payments requested for the same day that are made prior to 3:30 PM CT will be credited to your account today and show a receipt date in e-Bill the next business day. Payments requested for the same day that are made on or after 3:30 PM CT will be credited to your account the next day and have a receipt date in e-Bill two business days later. When selecting a future payment date, your account will be credited on the same day and show a receipt date in e-Bill the next business day.

Continued next page…

Make Online Payment (cont.)

3. The BANK NAME, ACCOUNT NUMBER and ROUTING NUMBER fields are populated with your bank information when you have set up this option with UnitedHealthcare Specialty Benefits Billing Department. You will not be able to enter this information on-line.
4. If the bank information has not been previously set up with the billing department, you will receive the following message at the top of the MAKE ONLINE PAYMENT screen: Your bank information was not found. Please submit the Electronic Payment Authorization form to the UnitedHealthcare Specialty Benefits Billing Department. You will not be able to continue with the on-line payment process.
5. Verify the amount due matches the outstanding amount due for all your on-line invoices. If there is a discrepancy, contact the UnitedHealthcare Specialty Benefits billing department.
6. Click on the PAYMENT AMOUNT field and type in the correct amount of your payment
7. Click on the down arrow at the end of the DATE TO SUBMIT PAYMENT field to open the pop-up calendar.
8. Select the date of the month the money will be transferred from your account to UnitedHealthcare Specialty Benefits.

> **Important:** This must be a business day. The current date is populated by default. Click on the > arrow on the pop-up calendar to change to the following month. Please review the selecting a payment date information at the bottom of the screen.

9. Click on the **Submit Payment** button to submit your online payment and open the confirmation screen.
10. Or, click on the **Cancel** button to close the MAKE ONLINE PAYMENT screen and return to the Payment Options screen.

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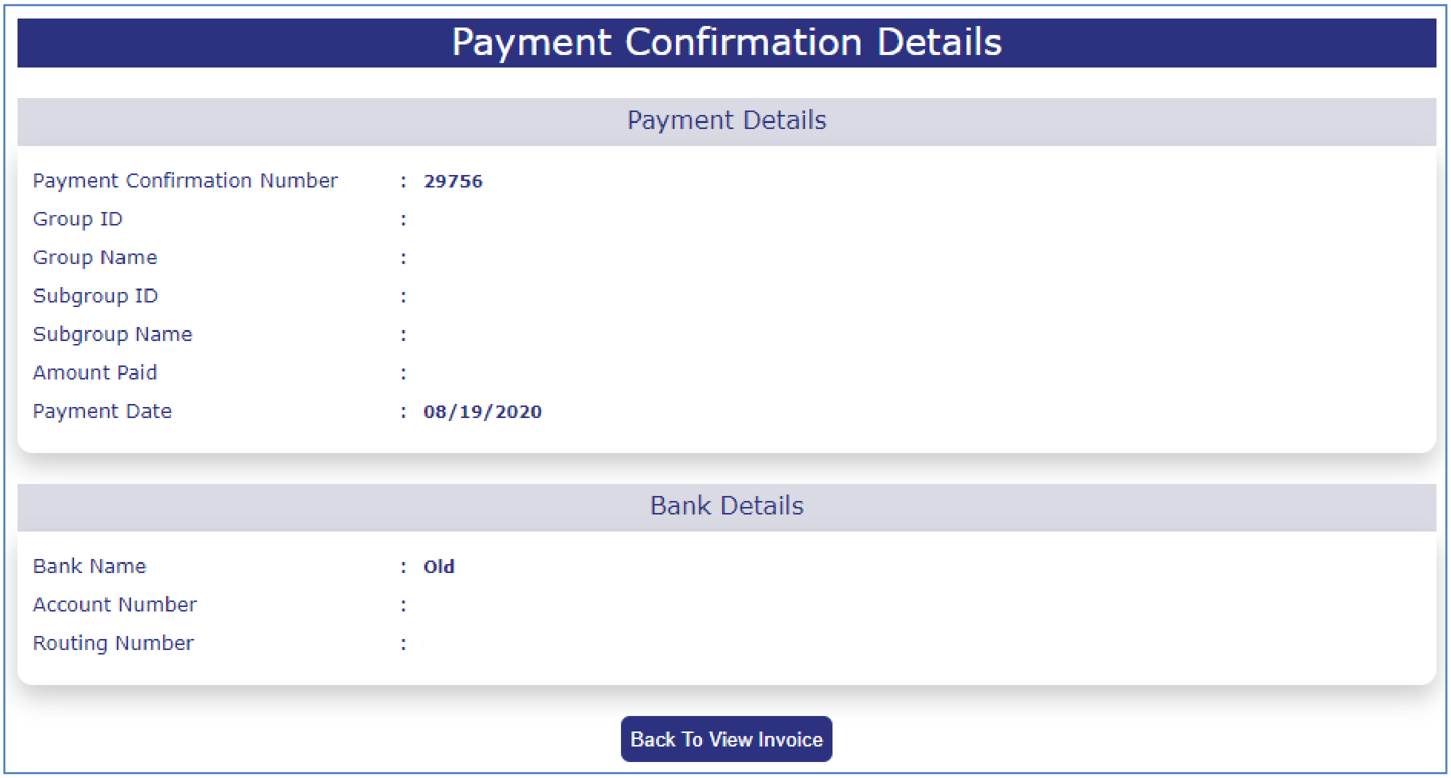


Payment Confirmation Details

Payment Details

Payment Confirmation Number : 29756
Group ID :
Group Name :
Subgroup ID :
Subgroup Name :
Amount Paid :
Payment Date : 08/19/2020

Bank Details

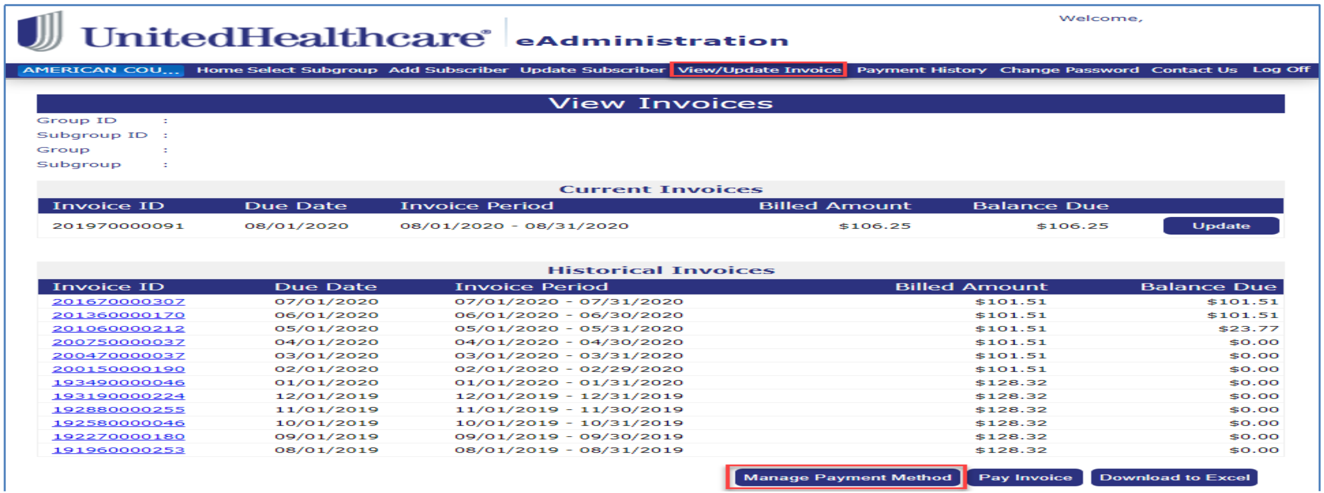
Bank Name : Old
Account Number :
Routing Number :

Make Online Payment (cont.)

11. When the on-line payment is successful, you will see the confirmation screen. This screen displays the following:
    - Payment Confirmation Number
    - Group and Subgroup ID and Name
    - Amount Paid
    - Payment Date
    - Bank Information
12. Print the screen for your records, if necessary.
13. Click **<Back to View Invoice>** to close the confirmation screen and return tothe **VIEW INVOICES** screen.

Scheduled Direct Debit ACH – Add Account

- Allowed three transaction daily, any combination of **“Add, Update or Cancel”**.



View Invoices

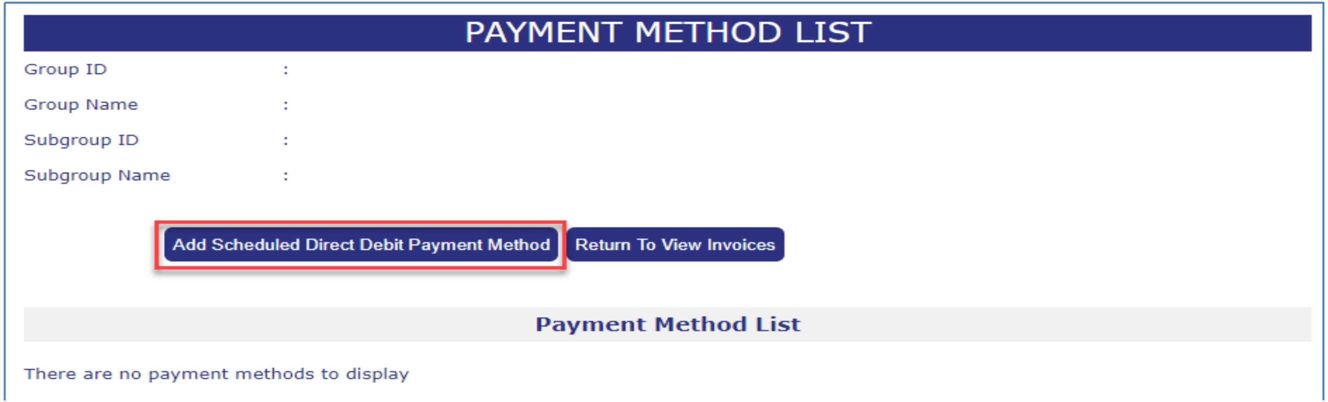
Group ID :
Subgroup ID :
Group :
Subgroup :

Current Invoices

Invoice ID	Due Date	Invoice Period	Billed Amount	Balance Due
201970000091	08/01/2020	08/01/2020 - 08/31/2020	$106.25	$106.25

Historical Invoices

Invoice ID	Due Date	Invoice Period	Billed Amount	Balance Due
201670000307	07/01/2020	07/01/2020 - 07/31/2020	$101.51	$101.51
201360000170	06/01/2020	06/01/2020 - 06/30/2020	$101.51	$101.51
201060000212	05/01/2020	05/01/2020 - 05/31/2020	$101.51	$23.77
200750000037	04/01/2020	04/01/2020 - 04/30/2020	$101.51	$0.00
200470000037	03/01/2020	03/01/2020 - 03/31/2020	$101.51	$0.00
200150000190	02/01/2020	02/01/2020 - 02/29/2020	$101.51	$0.00
193490000046	01/01/2020	01/01/2020 - 01/31/2020	$128.32	$0.00
193190000224	12/01/2019	12/01/2019 - 12/31/2019	$128.32	$0.00
192880000255	11/01/2019	11/01/2019 - 11/30/2019	$128.32	$0.00
192580000046	10/01/2019	10/01/2019 - 10/31/2019	$128.32	$0.00
192270000180	09/01/2019	09/01/2019 - 09/30/2019	$128.32	$0.00
191960000253	08/01/2019	08/01/2019 - 08/31/2019	$128.32	$0.00

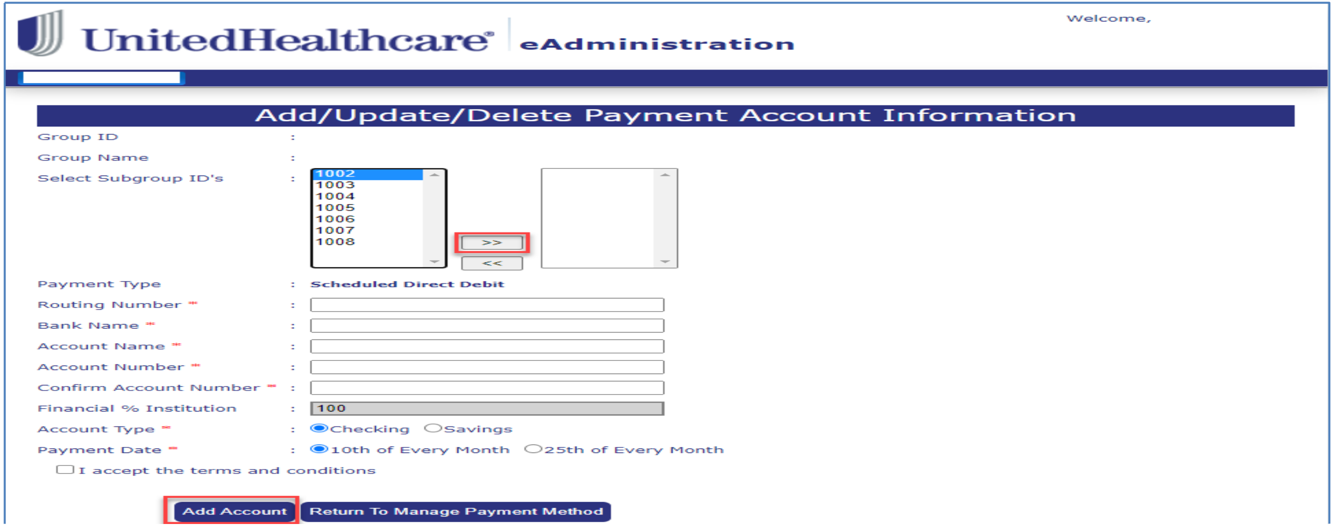


PAYMENT METHOD LIST

Group ID :
Group Name :
Subgroup ID :
Subgroup Name :

Payment Method List

There are no payment methods to display



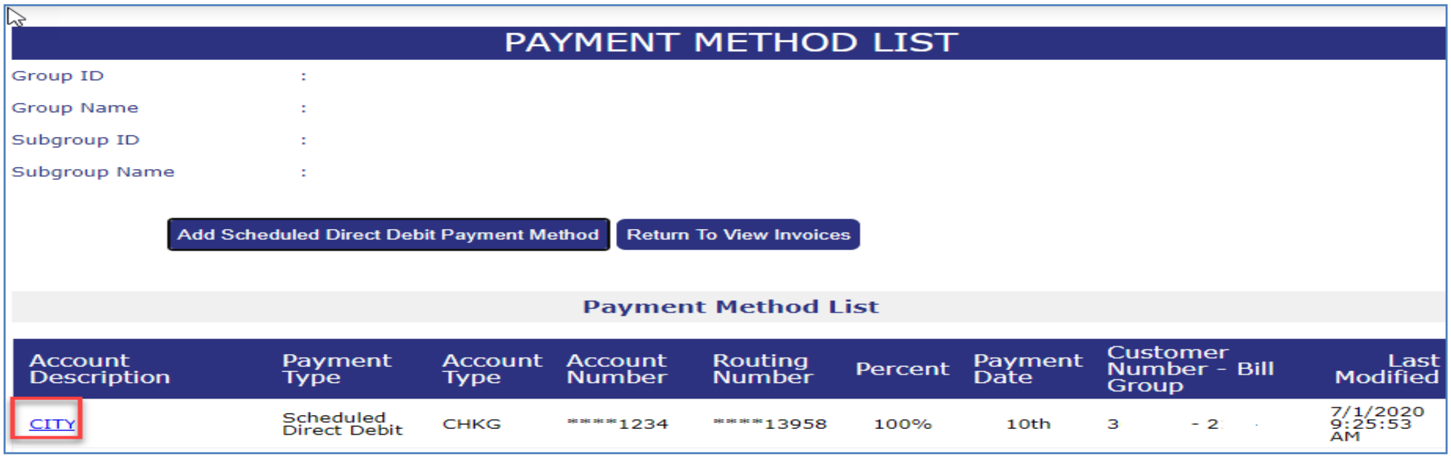
Add/Update/Delete Payment Account Information

Group ID :
Group Name :
Select Subgroup ID's :
Payment Type : Scheduled Direct Debit
Routing Number * :
Bank Name * :
Account Name * :
Account Number * :
Confirm Account Number * :
Financial % Institution : 100
Account Type * : ● Checking ○ Savings
Payment Date * : ● 10th of Every Month ○ 25th of Every Month
☐ I accept the terms and conditions

1. Select ***View/Update Invoice***, menu option
2. Select ***Manage Payment Method***, button at bottom of screen.
3. Select ***Add Scheduled Direct Debit Payment Method***, button
4. Select ***Subgroup*** or ***Multiple Subgroups***, that will use the same Account Information
    a. Select >>, double arrows pointing right to **Add**
    b. Select <<, double arrows pointing left to **Remove**
5. Enter All Required Fields, (if incorrect Routing number entered more than two times, prompted to try again later or at another time)
    - Routing Number
    - Bank Name (will auto populate after valid routing number has been entered
    - Account Name
    - Account Number
    - Confirm Account Number
    - Account Type
    - Payment Date
6. Select Click box next to **"I Accept the terms and conditions" link**, read and review then close page or you may return to eAdministrative URL tab.
7. Click **Check box** next to "I Accept the Terms and Condition"
8. Select **Add Account**

Scheduled Direct Debit ACH – Update Account

- Allowed three transaction daily, any combination of **"Add, Update or Cancel"**.



Group ID :
Group Name :
Subgroup ID :
Subgroup Name :

Account Description	Payment Type	Account Type	Account Number	Routing Number	Percent	Payment Date	Customer Number - Bill Group	Last Modified
CITY	Scheduled Direct Debit	CHKG	****1234	****13958	100%	10th	3 - 2	7/1/2020 9:25:53 AM

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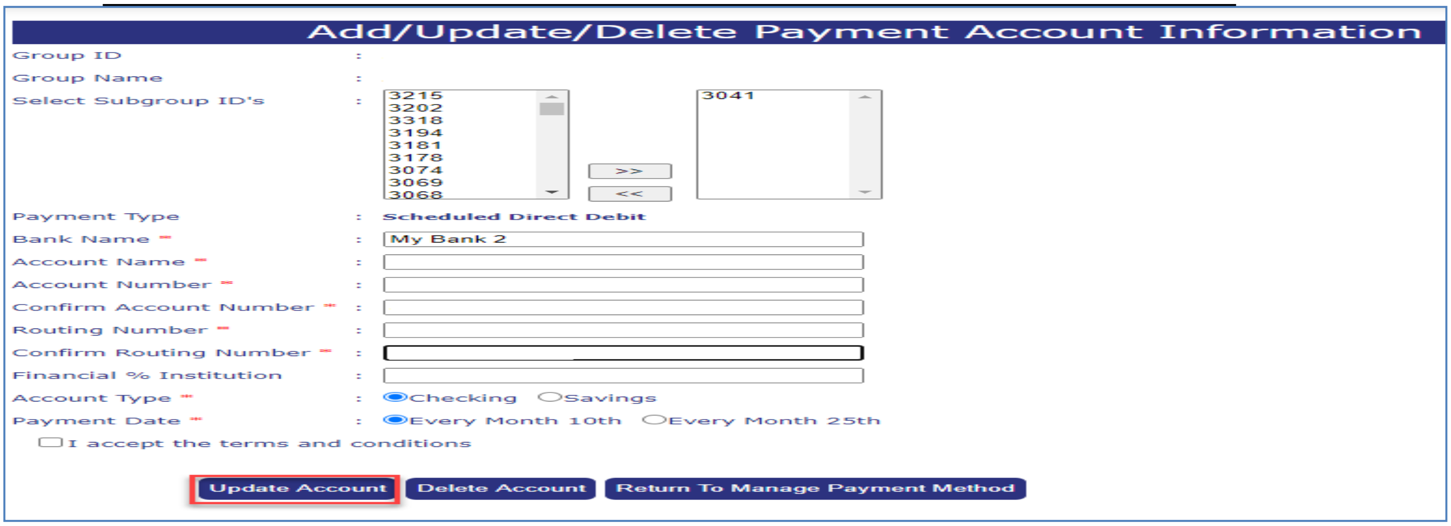


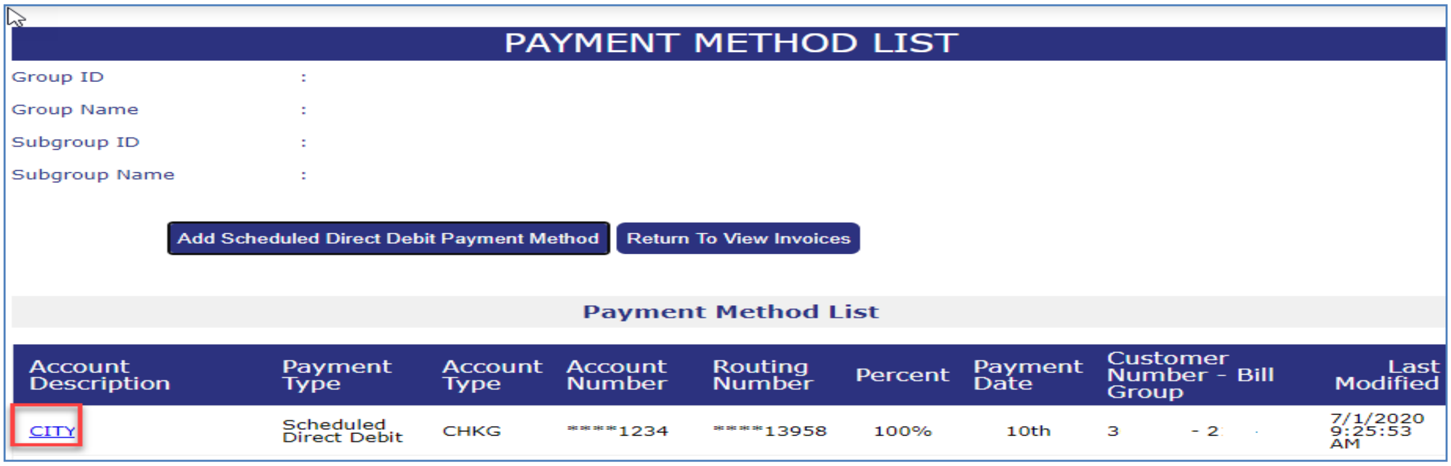
Add/Update/Delete Payment Account Information

Group ID :
Group Name :
Select Subgroup ID's : 3215 3202 3318 3194 3181 3178 3074 3069 3068 | 3041
Payment Type : Scheduled Direct Debit
Bank Name * : My Bank 2
Account Name * :
Account Number * :
Confirm Account Number * :
Routing Number * :
Confirm Routing Number * :
Financial % Institution :
Account Type * : ● Checking ○ Savings
Payment Date * : ● Every Month 10th ○ Every Month 25th
☐ I accept the terms and conditions

1. Select ***View/Update Invoice***, menu option
2. Select ***Manage Payment Method***, button at bottom of screen.
3. Select ***Account Description***, for Subgroup you want to update
4. Select ***Subgroup*** or ***Multiple Subgroups***, that will use the same Account Information
    a. Select >>, double arrows pointing right to **Add**
    b. Select <<, double arrows pointing left to **Remove**
5. Enter All Required Fields, (if incorrect Routing number entered more than two times, prompted to try again later or at another time)
    - Routing Number
    - Bank Name (will auto populate after valid routing number has been entered
    - Account Name
    - Account Number
    - Confirm Account Number
    - Account Type
    - Payment Date
6. Select Click box next to **"I Accept the terms and conditions" link**, read and review then close page or you may return to eAdministrative URL tab.
7. Click **Check box** next to "I Accept the Terms and Condition"
8. Select **Update Account**

Scheduled Direct Debit ACH – Cancel Account

*Allowed three transaction daily, any combination of **“Add, Update or Cancel”**.

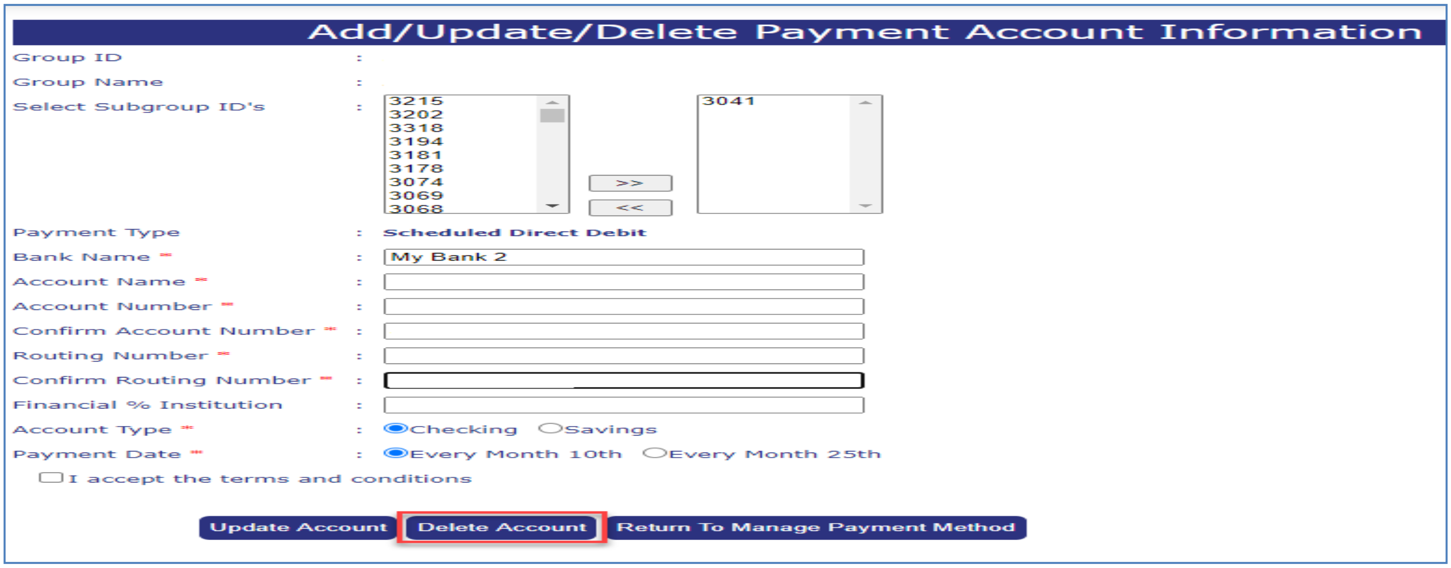


PAYMENT METHOD LIST

Group ID :
Group Name :
Subgroup ID :
Subgroup Name :

Payment Method List

Account Description	Payment Type	Account Type	Account Number	Routing Number	Percent	Payment Date	Customer Number - Bill Group	Last Modified
CITY	Scheduled Direct Debit	CHKG	*****1234	*****13958	100%	10th	3 - 2	7/1/2020 9:25:53 AM

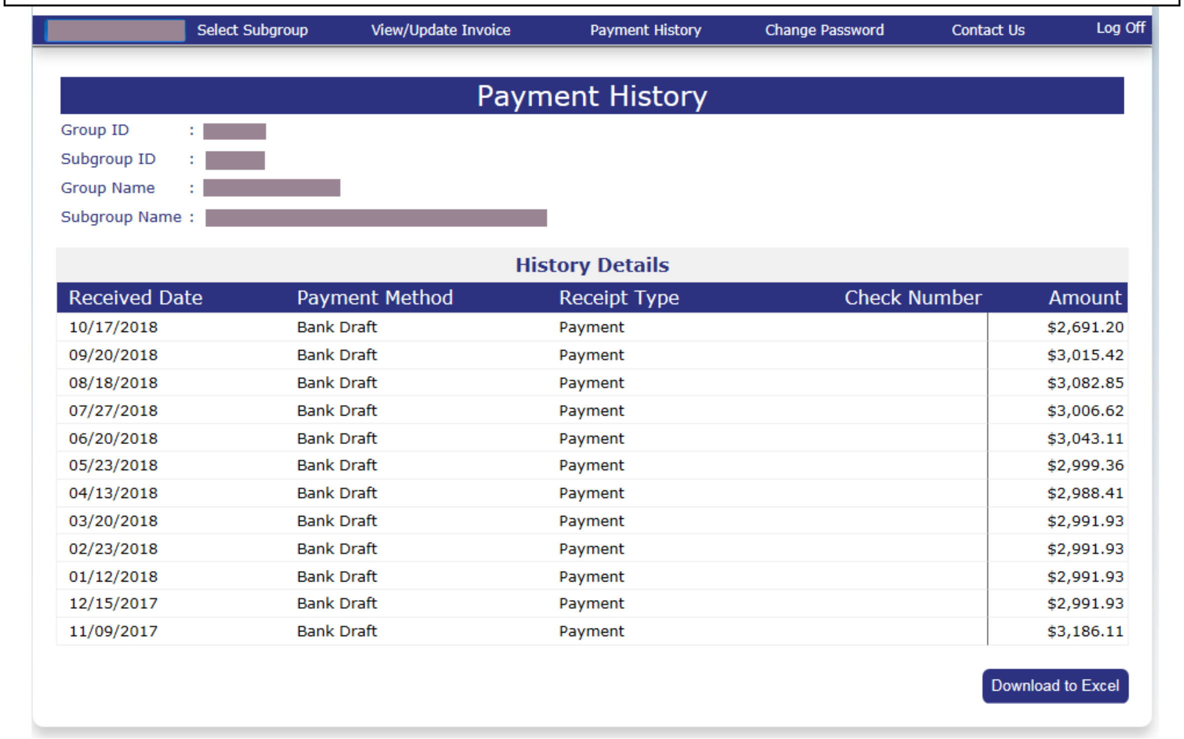


Add/Update/Delete Payment Account Information

Group ID :
Group Name :
Select Subgroup ID's : 3215 3202 3318 3194 3181 3178 3074 3069 3068 | 3041
Payment Type : Scheduled Direct Debit
Bank Name ** : My Bank 2
Account Name ** :
Account Number ** :
Confirm Account Number ** :
Routing Number ** :
Confirm Routing Number ** :
Financial % Institution :
Account Type ** : ● Checking ○ Savings
Payment Date ** : ● Every Month 10th ○ Every Month 25th
☐ I accept the terms and conditions

1. Select ***View/Update Invoice***, menu option
2. Select ***Manage Payment Method***, button at bottom of screen.
3. Select ***Account Description***, for Subgroup you want to Cancel
4. Select ***Subgroup*** or ***Multiple Subgroups***,
   a. Select >>, double arrows pointing right to **Add**
   b. Select <<, double arrows pointing left to **Remove**
5. Select Click box next to **“I Accept the terms and conditions” link**, read and review then close page or you may return to eAdministrative URL tab.
6. Click **Check box** next to "I Accept the Terms and Condition"
7. Select **Delete Account**

Section 4: Payment History



Payment History

Group ID : [redacted]
Subgroup ID : [redacted]
Group Name : [redacted]
Subgroup Name : [redacted]

History Details

Received Date	Payment Method	Receipt Type	Check Number	Amount
10/17/2018	Bank Draft	Payment		$2,691.20
09/20/2018	Bank Draft	Payment		$3,015.42
08/18/2018	Bank Draft	Payment		$3,082.85
07/27/2018	Bank Draft	Payment		$3,006.62
06/20/2018	Bank Draft	Payment		$3,043.11
05/23/2018	Bank Draft	Payment		$2,999.36
04/13/2018	Bank Draft	Payment		$2,988.41
03/20/2018	Bank Draft	Payment		$2,991.93
02/23/2018	Bank Draft	Payment		$2,991.93
01/12/2018	Bank Draft	Payment		$2,991.93
12/15/2017	Bank Draft	Payment		$2,991.93
11/09/2017	Bank Draft	Payment		$3,186.11

Payment History

To review a twelve-month history of payments, please follow these steps:

1. Click on the **Payment History** menu option at the top of the screen.
2. The **PAYMENT HISTORY** screen opens and displays the following information about the payments received:
    - Received Date
    - Payment Method
    - Receipt Type
    - Check Number
    - Payment Amount
3. Verify that UnitedHealthcare Specialty Benefits has received your online or mailed payment. For mailed payments, be sure to allow at least one week for mailing time.

> **Note:** There may be some reversals due to keying errors; the correct premium amount should appear after the reversal of the incorrect premium amount.

CHAPTER 5: FORMS LIBRARY SYSTEM

PURPOSE

This chapter provides detailed information regarding the Forms Library System. Most of the forms identified in the Administration Manual are accessible through the UnitedHealthcare Specialty Benefits *eAdministration* website.

As an external user, the user id assigned to you will identify the appropriate Contract Situs State and Underwriting Company necessary to provide a listing of available forms.

The list of forms can be restricted by selecting one of the following categories:

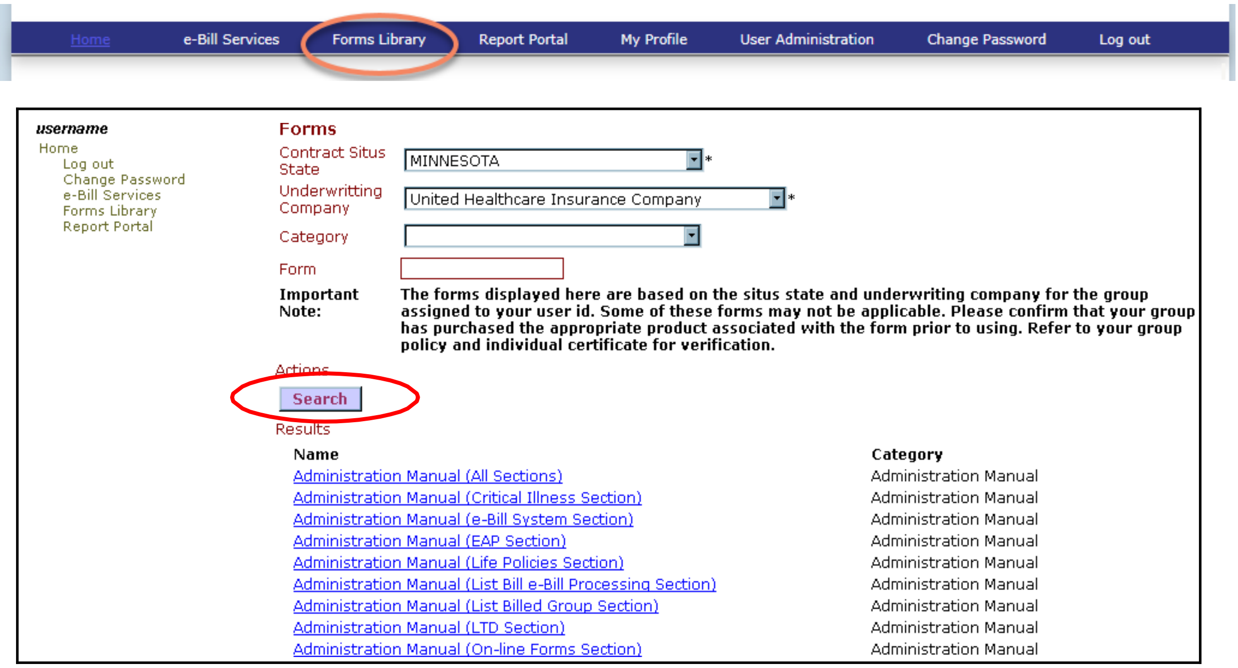
- Admin Guide
- Beneficiary Forms
- Claim Forms
- Conversion & Portability Forms
- Enrollment Forms
- Evidence of Insurability (EOI) Forms
- Miscellaneous Forms

BEFORE YOU BEGIN

Login to the *eAdministration* Home page.

IN THIS CHAPTER

The following topics are included in this chapter



Contract Situs State: MINNESOTA *

Underwritting Company: United Healthcare Insurance Company *

Category:

Form:

Important Note: **The forms displayed here are based on the situs state and underwriting company for the group assigned to your user id. Some of these forms may not be applicable. Please confirm that your group has purchased the appropriate product associated with the form prior to using. Refer to your group policy and individual certificate for verification.**

Name	Category
Administration Manual (All Sections)	Administration Manual
Administration Manual (Critical Illness Section)	Administration Manual
Administration Manual (e-Bill System Section)	Administration Manual
Administration Manual (EAP Section)	Administration Manual
Administration Manual (Life Policies Section)	Administration Manual
Administration Manual (List Bill e-Bill Processing Section)	Administration Manual
Administration Manual (List Billed Group Section)	Administration Manual
Administration Manual (LTD Section)	Administration Manual
Administration Manual (On-line Forms Section)	Administration Manual

Opening Forms Library

You will access the FORMS LIBRARY from the *eAdministration* HOME screen.

To open the Forms Library, please follow these steps:

1. Follow the steps to open the *eAdministration* HOME screen. See **Chapter1: System Overview, Section 2: Getting Started, topic: Opening eAdministration** for more detailed information.
2. The *eAdministration* HOME menu displays a list of applications and/or functions you have access to. For example:
   - Log out
   - Change Password
   - My Profile
   - e-Bill Services
   - Forms Library (if assigned to the user id)
   - Report Portal (if assigned to the user id)
3. Click on the **Forms Library** link to open the **FORMS** screen.

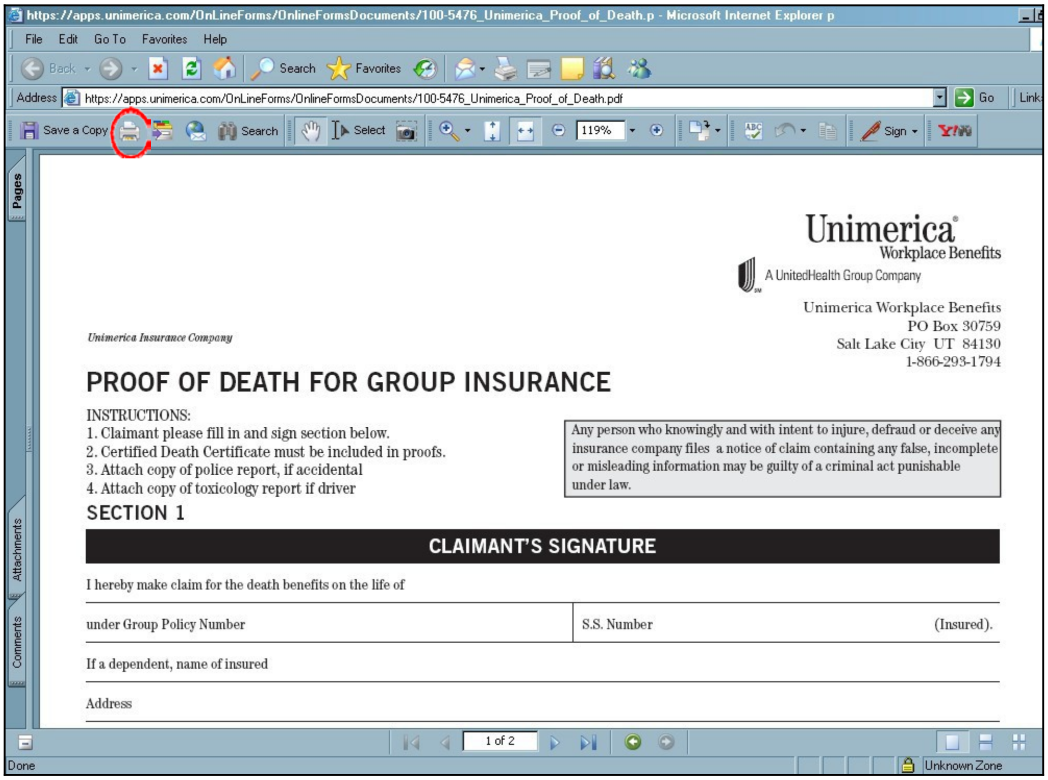
Continued on next page...

Opening Forms Library (cont.)

4. The CONTRACT SITUS STATE and UNDERWRITING COMPANY fields are disabled and are for display only. These fields are populated based on the Contract Situs State and Underwriting Company associated with the group assigned to the user id.

> **Important Note:** Some of these forms may not be applicable. Please confirm that your group has purchased the appropriate product associated with the form prior to using. Refer to your group policy and individual certificate for verification.

5. Click **<Search>** to display a listing of all the available forms. Each form will display as a link.
6. Click on the appropriate form name/link to open the form in a Portable Document Format (PDF) into a separate window.
7. To print the form, click on the printer icon on the Adobe Acrobat Reader toolbar.



Unimerica®
Workplace Benefits
A UnitedHealth Group Company

Unimerica Workplace Benefits
PO Box 30759
Salt Lake City UT 84130
1-866-293-1794

Unimerica Insurance Company

PROOF OF DEATH FOR GROUP INSURANCE

INSTRUCTIONS:
1. Claimant please fill in and sign section below.
2. Certified Death Certificate must be included in proofs.
3. Attach copy of police report, if accidental
4. Attach copy of toxicology report if driver

Any person who knowingly and with intent to injure, defraud or deceive any insurance company files a notice of claim containing any false, incomplete or misleading information may be guilty of a criminal act punishable under law.

SECTION 1

CLAIMANT'S SIGNATURE

I hereby make claim for the death benefits on the life of

under Group Policy Number

S.S. Number (Insured).

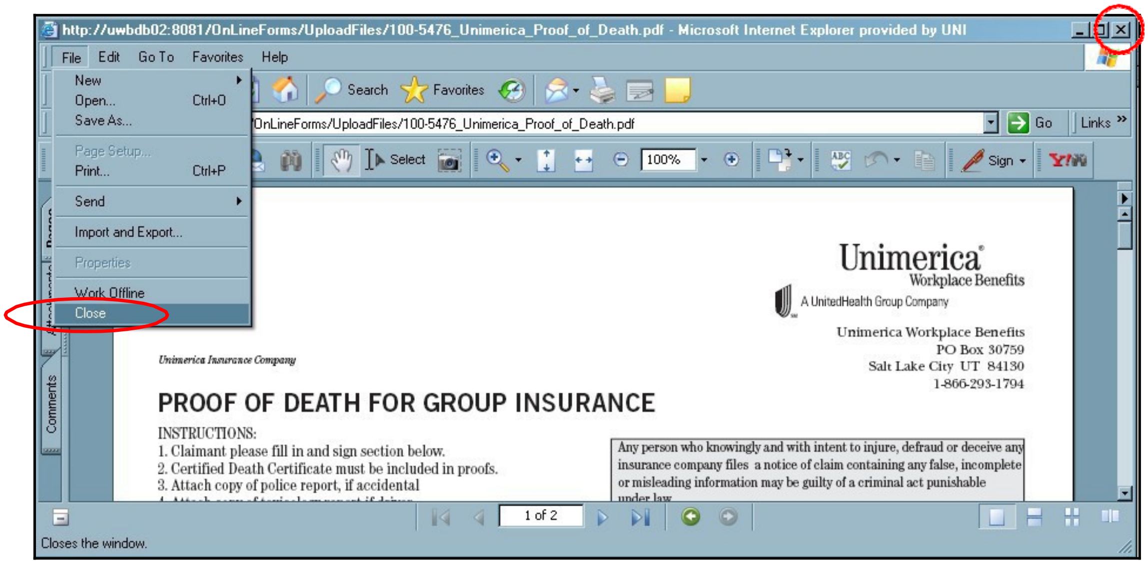
If a dependent, name of insured

Address

Continued next page…

Opening Forms Library (cont.)

8. To close the Adobe Acrobat Reader window, click on the ‘X” at the top right-hand side of the window, or click on the **File** menu option then click on the **Close** option.



http://uwbdb02:8081/OnLineForms/UploadFiles/100-5476_Unimerica_Proof_of_Death.pdf - Microsoft Internet Explorer provided by UNI

/OnLineForms/UploadFiles/100-5476_Unimerica_Proof_of_Death.pdf

Unimerica® Workplace Benefits
A UnitedHealth Group Company

Unimerica Workplace Benefits
PO Box 30759
Salt Lake City UT 84130
1-866-293-1794

Unimerica Insurance Company

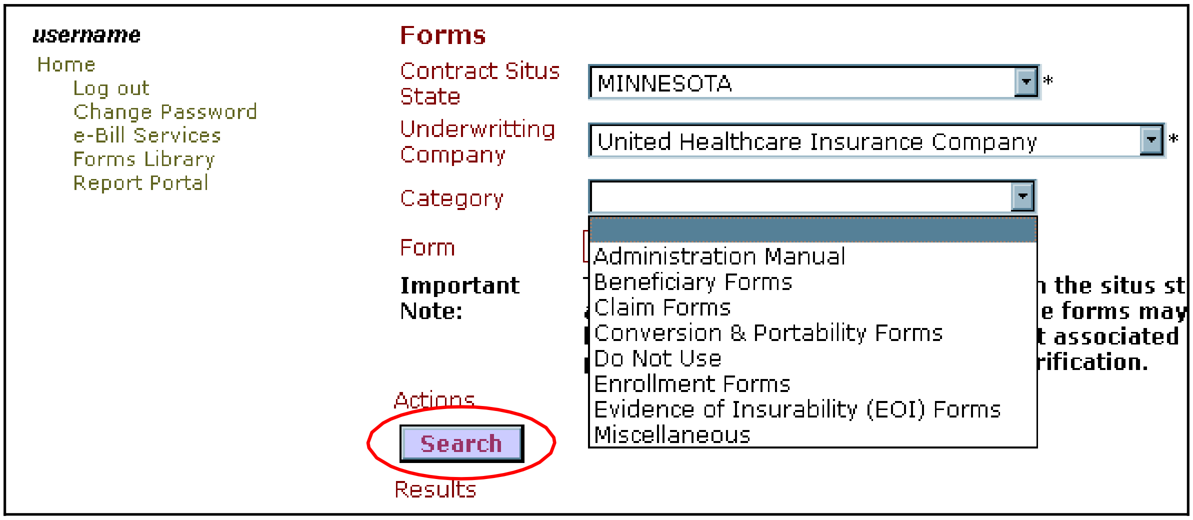
PROOF OF DEATH FOR GROUP INSURANCE

INSTRUCTIONS:
1. Claimant please fill in and sign section below.
2. Certified Death Certificate must be included in proofs.
3. Attach copy of police report, if accidental

Any person who knowingly and with intent to injure, defraud or deceive any insurance company files a notice of claim containing any false, incomplete or misleading information may be guilty of a criminal act punishable under law

Closes the window.

9. To log out of the **FORMS** Library and *eAdministration* system, click on the Log out link on the menu list located on the left-hand side of the **FORMS** screen.
10. When you select the Log-out link, or have timed out of the website, the **Log In** screen will display.



Contract Situs State: MINNESOTA *

Underwritting Company: United Healthcare Insurance Company *

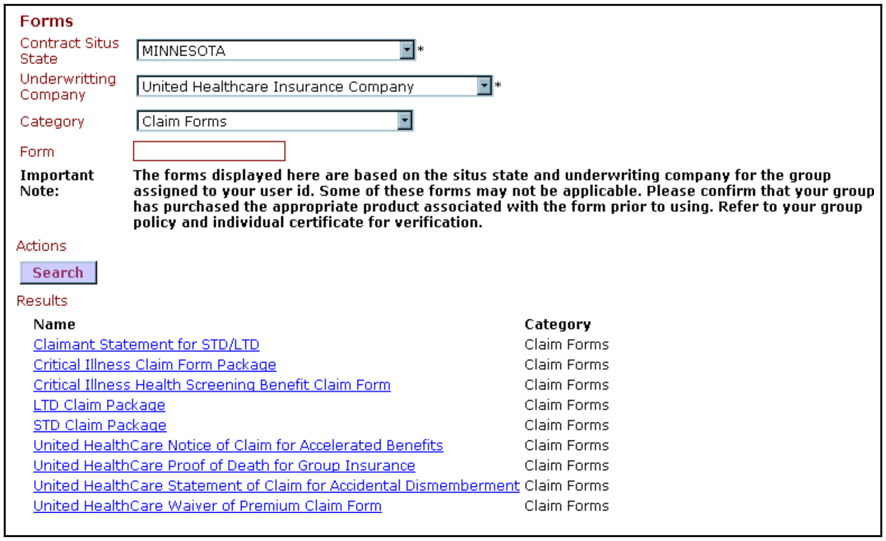
Category:

Form

Important Note: n the situs st e forms may t associated rification.

To limit the results form listing by category, please follow these steps:

1. Log on into the **Forms Library** system to open the **FORMS** screen.
2. The CONTRACT SITUS STATE and UNDERWRITING COMPANY are automatically populated based on the group assigned to your user id.
3. Click on the CATEGORY field down arrow to open the drop-down list.
4. Click on an option from the category drop-down menu list.
5. Click **<Search >** to create a list of available forms based on the category selected.
6. The list of available forms will display in the Results area based on the Contract Situs State, Underwriting Company and Category. In this example, the Claim Forms category was used.



Contract Situs State: MINNESOTA *

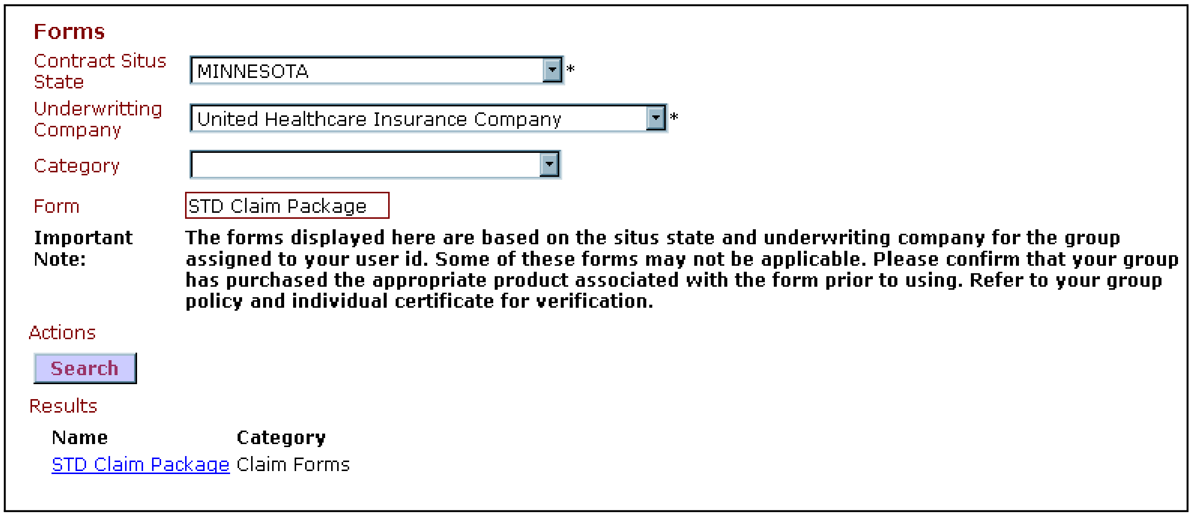
Underwritting Company: United Healthcare Insurance Company *

Category: Claim Forms

Form

Important Note: **The forms displayed here are based on the situs state and underwriting company for the group assigned to your user id. Some of these forms may not be applicable. Please confirm that your group has purchased the appropriate product associated with the form prior to using. Refer to your group policy and individual certificate for verification.**

Name	Category
Claimant Statement for STD/LTD	Claim Forms
Critical Illness Claim Form Package	Claim Forms
Critical Illness Health Screening Benefit Claim Form	Claim Forms
LTD Claim Package	Claim Forms
STD Claim Package	Claim Forms
United HealthCare Notice of Claim for Accelerated Benefits	Claim Forms
United HealthCare Proof of Death for Group Insurance	Claim Forms
United HealthCare Statement of Claim for Accidental Dismemberment	Claim Forms
United HealthCare Waiver of Premium Claim Form	Claim Forms



Forms

Contract Situs State: MINNESOTA *

Underwritting Company: United Healthcare Insurance Company *

Category:

Form: STD Claim Package

Important Note: **The forms displayed here are based on the situs state and underwriting company for the group assigned to your user id. Some of these forms may not be applicable. Please confirm that your group has purchased the appropriate product associated with the form prior to using. Refer to your group policy and individual certificate for verification.**

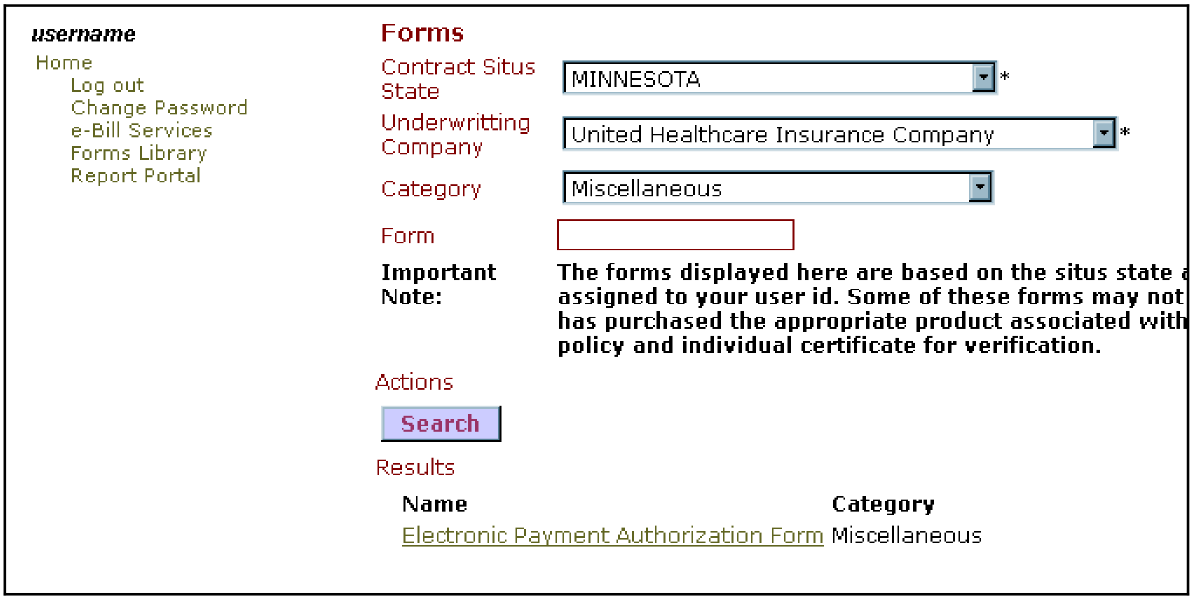
Results

Name	Category
STD Claim Package	Claim Forms

Search by Form Name

If you know the exact name of the form you need, search by the form name by following these steps:

1. Click on the **Forms Library** link on the *eAdministration* **HOME** screen to open the **FORMS** screen.
2. Click on the FORM field and type in the exact name of the form.
3. Click **<Search>** to display the form as a link under the Results section.



Contract Situs State: MINNESOTA *

Underwritting Company: United Healthcare Insurance Company *

Category: Miscellaneous

Form:

Important Note: The forms displayed here are based on the situs state a
assigned to your user id. Some of these forms may not
has purchased the appropriate product associated with
policy and individual certificate for verification.

Name	Category
Electronic Payment Authorization Form	Miscellaneous

Electronic Payment Authorization Form

To print the Electronic Payment Authorization form, please follow these steps:

1. Click on the **Forms Library** link on the *eAdministration* **HOME** screen to open the **FORMS** screen.
2. Click on the CATEGORY down arrow to open the drop-down menu list.
3. Click on the **Miscellaneous** option from the drop-down menu list.
4. Click **<Search>** to display the Electronic Payment Authorization form as a link under the Results section.
5. Click on the Electronic Payment Authorization Form link to open the form in Adobe Acrobat Reader.
6. Click on the printer icon on the Adobe Acrobat Reader toolbar to send the form to your local printer.
7. Click on the “X” at the top right-hand side of the window to close the Adobe Acrobat Reader window.
8. Or, click on the **File** menu option at the top toolbar, then click on the **Close** option.

CHAPTER 6: REPORT PORTAL SYSTEM

PURPOSE

This chapter provides detailed information regarding the Report Portal system on our *eAdministration* website.

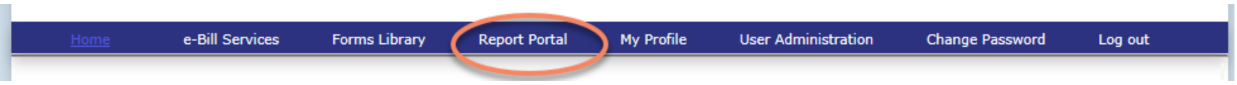
UnitedHealthcare Specialty Benefits has developed several reports that are accessible through the UnitedHealthcare Specialty Benefits website. As an external user, the user id assigned to you will identify the appropriate Group/subgroup necessary to create the available reports.

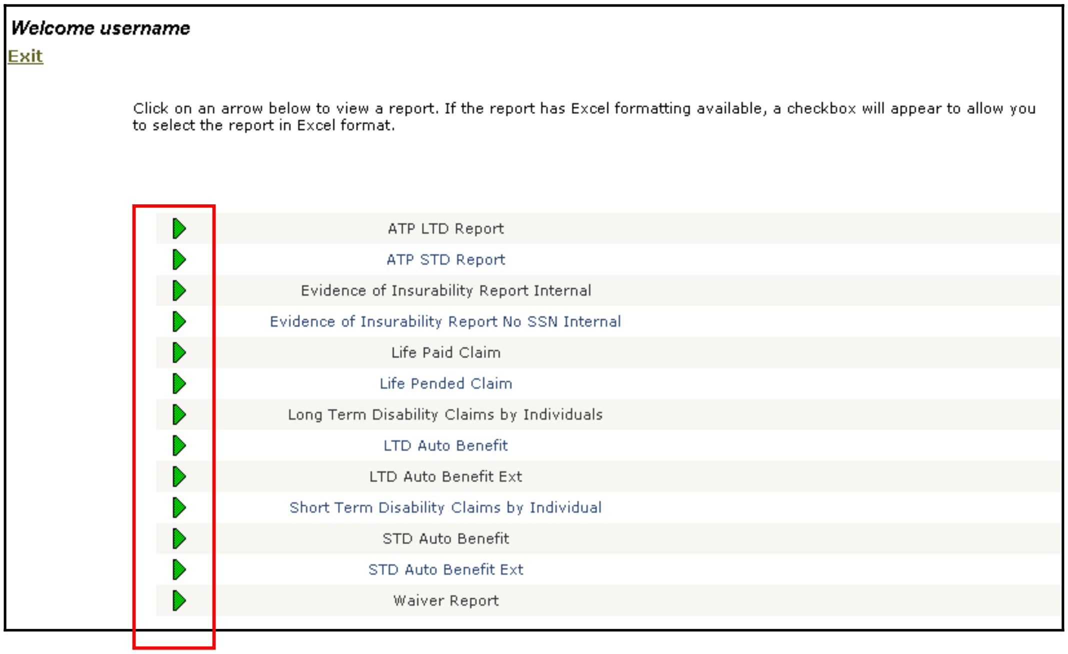
BEFORE YOU BEGIN

Login to the *eAdministration* HOME screen.

IN THIS CHAPTER

The following topics are included in this chapter:




Welcome username

Exit

Click on an arrow below to view a report. If the report has Excel formatting available, a checkbox will appear to allow you to select the report in Excel format.

ATP LTD Report
ATP STD Report
Evidence of Insurability Report Internal
Evidence of Insurability Report No SSN Internal
Life Paid Claim
Life Pended Claim
Long Term Disability Claims by Individuals
LTD Auto Benefit
LTD Auto Benefit Ext
Short Term Disability Claims by Individual
STD Auto Benefit
STD Auto Benefit Ext
Waiver Report

Opening the Report Portal

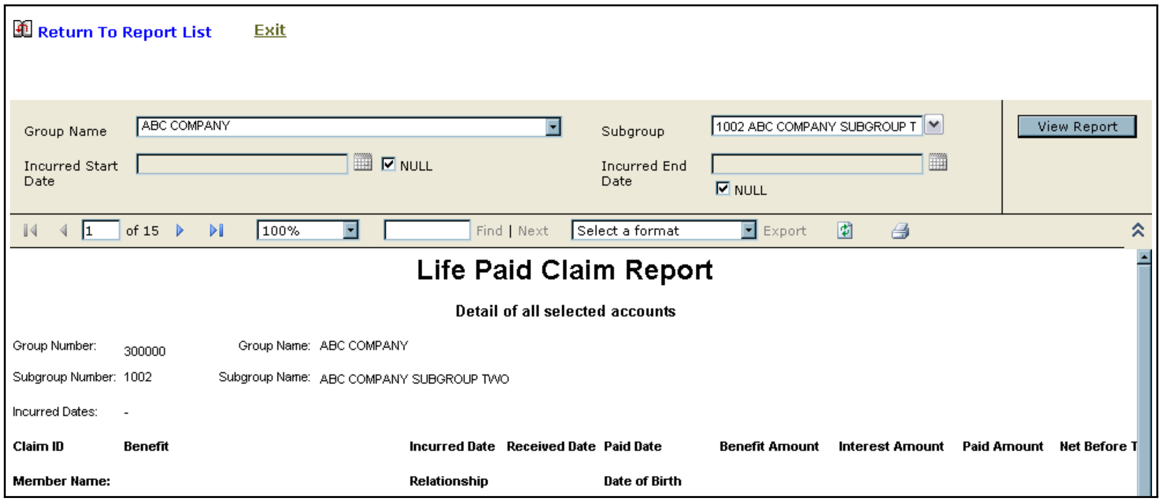
To access the web-based Report Portal, please follow these steps:

1. Follow the steps to open the *eAdministration* HOME screen. See **Chapter 1: System Overview, Section 2: Getting Started, topic: Opening *eAdministration*** for more detailed information.
2. The *eAdministration* HOME menu displays a list of applications and/or functions you have access to. For example:
    - Log out
    - Change Password
    - My Profile
    - e-Bill Services
    - Forms Library (if assigned to the user id)
    - Report Portal (if assigned to the user id)

Continued next page...

Opening the Report Portal (cont.)

3. Select the **Report Portal** link to open the **REPORT PORTAL** screen.
4. The **REPORT PORTAL** screen will display a listing of the report. The reports listed are limited by the products associated with your group.
5. Click on the green arrow to the left of the report name to open the report parameter screen.



Group Name: ABC COMPANY

Subgroup: 1002 ABC COMPANY SUBGROUP T

Incurred Start Date: ☑ NULL

Incurred End Date: ☑ NULL

Life Paid Claim Report

Detail of all selected accounts

Group Number: 300000 Group Name: ABC COMPANY

Subgroup Number: 1002 Subgroup Name: ABC COMPANY SUBGROUP TWO

Incurred Dates: -

Claim ID	Benefit	Incurred Date	Received Date	Paid Date	Benefit Amount	Interest Amount	Paid Amount	Net Before T
Member Name:		Relationship		Date of Birth				

Report Parameter

When you select a report from the **Report Portal** screen, a report parameter screen may appear. The report parameter screen allows the user to enter criterion in order to limit the report content.

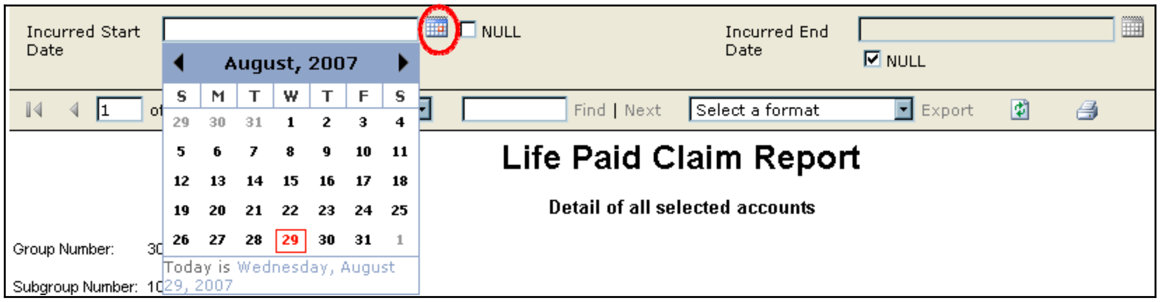
To filter a report from the **REPORT PARAMETER** screen, please follow these steps:

1. Open the **Report Portal** screen to view a listing of the available reports.
2. Click on the green arrow to the left of the report you want to create.
3. The GROUP NUMBER or NAME field will be pre-populated with the Group ID and Name associated with your user ID.
4. The SUBGROUP ID and NAME field will contain a drop-down list and will be pre-populated with the subgroups associated with your user id.

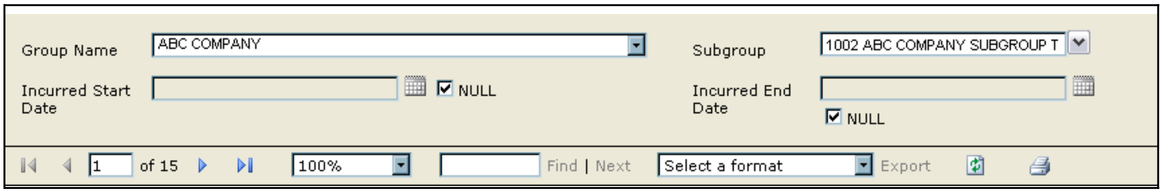
Continued next page...

Report Parameter (cont.)

5. Some fields may default to **Null**, which means that all available information based on these fields will display on the report.
6. To restrict the information displayed on the screen, de-select the **Null** checkbox by clicking on it. The checkmark will be removed and the textbox next to the de-selected checkbox will be opened for you to enter text.



7. For date fields, click on the calendar icon to open the pop-up calendar and select a date.
8. Or, just click on the date field and type in a valid date in mm/dd/yyyy format.
9. Click on the open textbox field that is not a date field and type in valid information.
10. Or, if the field has a down arrow, click on the down arrow to open the drop-down menu list.
11. Click **<View Report>** to create the report based on the criteria entered or defaulted.
12. The report will display on the screen.



Group Name: ABC COMPANY

Subgroup: 1002 ABC COMPANY SUBGROUP T

Incurred Start Date: ☑ NULL

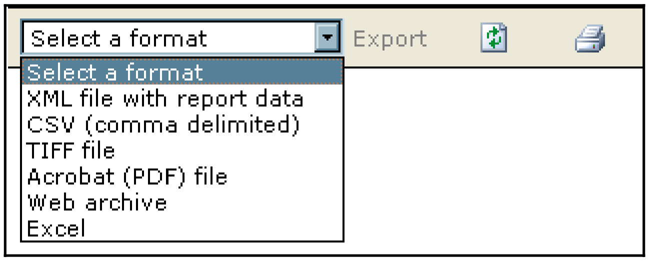
Incurred End Date: ☑ NULL

Report Functions

The report displayed on the screen can be viewed on the screen page by page, exported in a different format or printed.

To page through the report, please follow these steps:

1. To page through the report click:
   - Click on the right arrow ▷ to move to the next page
   - Click on the left arrow ◁ to move to the previous page
   - Click on the right arrow with a bar after it ▷| to jump to the last page
   - Click on the left arrow with a bar before it to jump |◁ to the first page
2. Or, click on the page field and type a page number to jump [2] of 15 to that page.
3. Click on the FIND | NEXT textbox field [ ] Find | Next to type in a specific word, and then click **Find** to search through the report for a specific item.
4. Click **Next** to search for the next instance of the item in the textbox.
5. To export the report into a different format, click on the down arrow on the Export field to open the drop-down list.

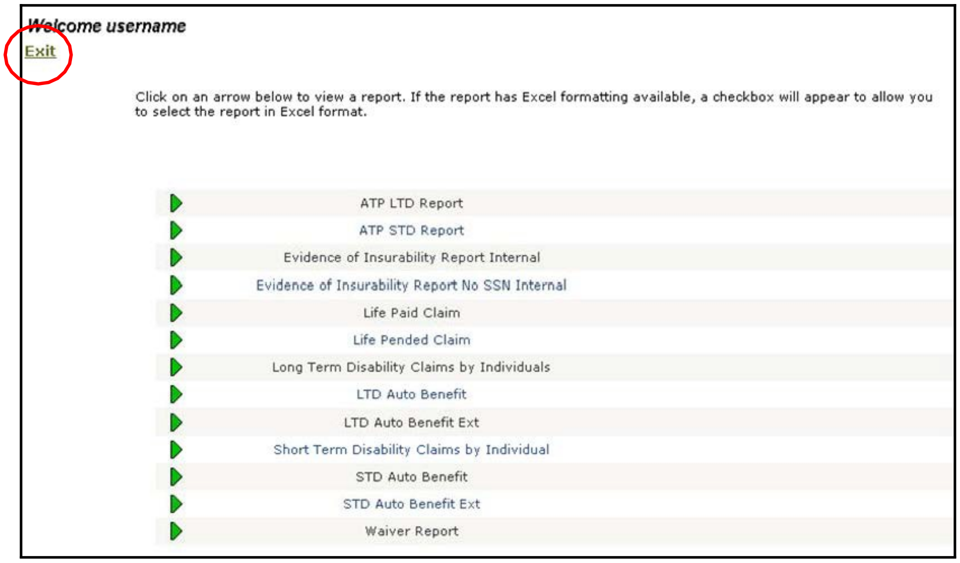


6. Click on a format then select **Export**.
7. The report will be exported into the format selected and will open in a separate window.
8. To print the report as displayed on the screen, click on the **printer** icon to send it to your local printer.

Continued next page...

Report Functions (cont.)

9. To close the report and report parameter screen, click on the **Return to Report List** icon. The listing of available reports will appear.



Welcome username

Exit

Click on an arrow below to view a report. If the report has Excel formatting available, a checkbox will appear to allow you to select the report in Excel format.

- ATP LTD Report
- ATP STD Report
- Evidence of Insurability Report Internal
- Evidence of Insurability Report No SSN Internal
- Life Paid Claim
- Life Pended Claim
- Long Term Disability Claims by Individuals
- LTD Auto Benefit
- LTD Auto Benefit Ext
- Short Term Disability Claims by Individual
- STD Auto Benefit
- STD Auto Benefit Ext
- Waiver Report

10. To close the report portal, click on the **Exit** link. You will return to the **WELCOME** screen.

11. If you have not timed out of the web site, you may need to also select the Log out link on the **WELCOME** screen.

12. When you select the Log-out link, or have timed out of the web site, the **LOGIN** screen displays.

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CHAPTER 7: USER ADMINISTRATION

PURPOSE

This chapter provides detailed information regarding the User Administration functionality. You must be setup as the group or subgroup "Super User" to gain access to this functionality. You will be able to add and maintain the users for your organization. This chapter will provide step-by-step instructions on the following functions:

- Add User
- Update User
- View User
- Reset Password
- Terminate User

Once you login to the *eAdministration* system, the USER ADMINISTRATION link will be displayed in the menu list on the HOME page.

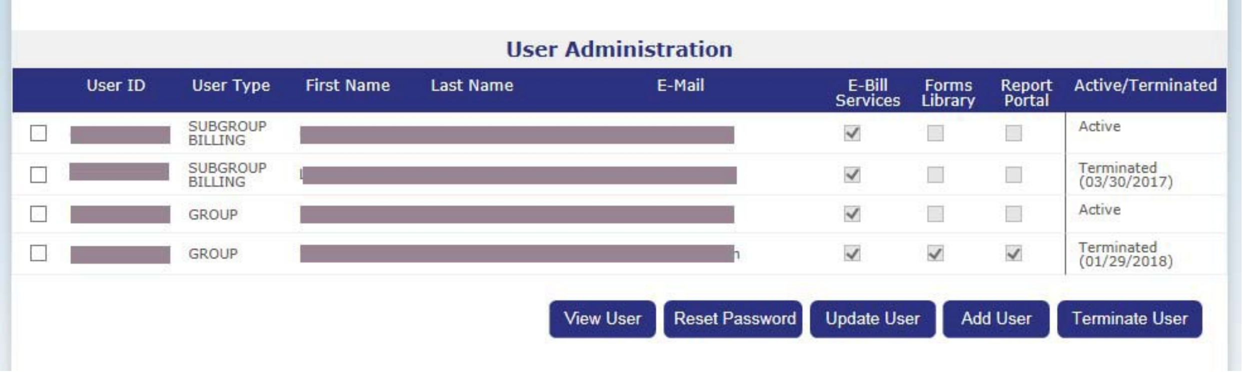
BEFORE YOU BEGIN

You must have been given access to the User Administration system. And login to the *eAdministration* HOME screen.

IN THIS CHAPTER

The following sections are included in this chapter:

Section 1: User Listing



	User ID	User Type	First Name	Last Name	E-Mail	E-Bill Services	Forms Library	Report Portal	Active/Terminated
☐	[redacted]	SUBGROUP BILLING	[redacted]	[redacted]	[redacted]	☑	☐	☐	Active
☐	[redacted]	SUBGROUP BILLING	[redacted]	[redacted]	[redacted]	☑	☐	☐	Terminated (03/30/2017)
☐	[redacted]	GROUP	[redacted]	[redacted]	[redacted]	☑	☐	☐	Active
☐	[redacted]	GROUP	[redacted]	[redacted]	[redacted]	☑	☑	☑	Terminated (01/29/2018)

Opening the User Maintenance system

To open the User Administration system, click on the USER ADMINISTRATION link.

The User Listing screen displays all existing user assigned to your organization. You will be able to review the following information for each user:

- A checkbox to select an existing user
- User ID
- User Type
- First Name
- Last Name
- E-mail address
- System access to e-Bill Services, Forms Library or Report Portal
- Active or Terminated status

The following command buttons are available from this screen:

- View User (to review the existing information for a user)
- Reset Password
- Update User
- Add User
- Terminate User

Section 2: Add User

PURPOSE

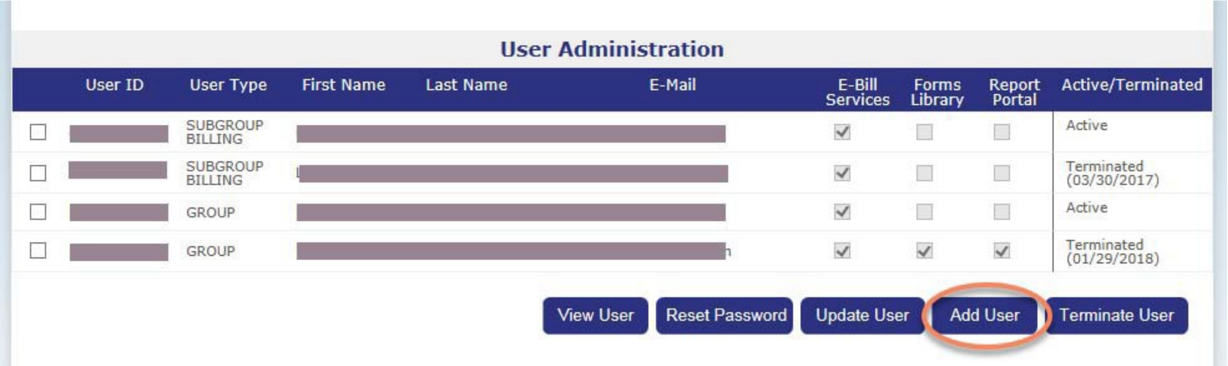
This section provides detailed information regarding how to add a new user.

BEFORE YOU BEGIN

Login to the eAdministration system and open the User Listing screen by clicking on the User Administration link.

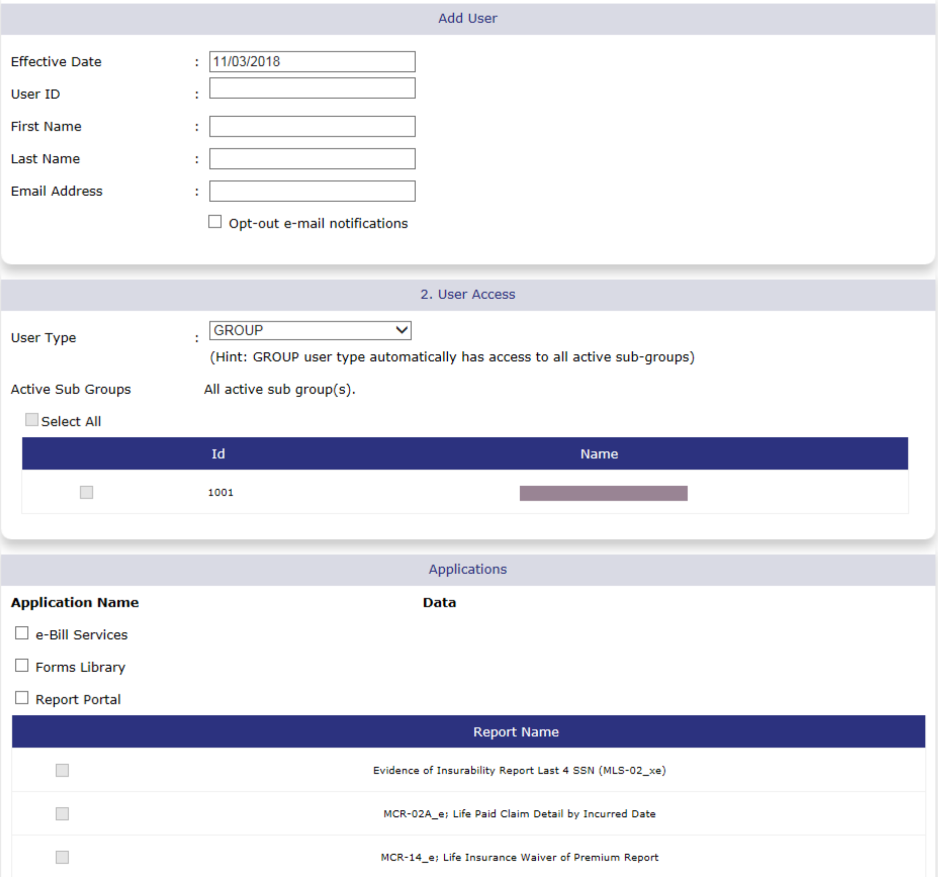
IN THIS SECTION

The following topics are included in this section:



User Administration

	User ID	User Type	First Name	Last Name	E-Mail	E-Bill Services	Forms Library	Report Portal	Active/Terminated
☐	[redacted]	SUBGROUP BILLING	[redacted]	[redacted]	[redacted]	☑	☐	☐	Active
☐	[redacted]	SUBGROUP BILLING	[redacted]	[redacted]	[redacted]	☑	☐	☐	Terminated (03/30/2017)
☐	[redacted]	GROUP	[redacted]	[redacted]	[redacted]	☑	☐	☐	Active
☐	[redacted]	GROUP	[redacted]	[redacted]	[redacted]	☑	☑	☑	Terminated (01/29/2018)



Add User

Effective Date : 11/03/2018
User ID :
First Name :
Last Name :
Email Address :
☐ Opt-out e-mail notifications

2. User Access

User Type : GROUP
(Hint: GROUP user type automatically has access to all active sub-groups)

Active Sub Groups All active sub group(s).

☐ Select All

	Id	Name
☐	1001	[redacted]

Applications

Application Name **Data**

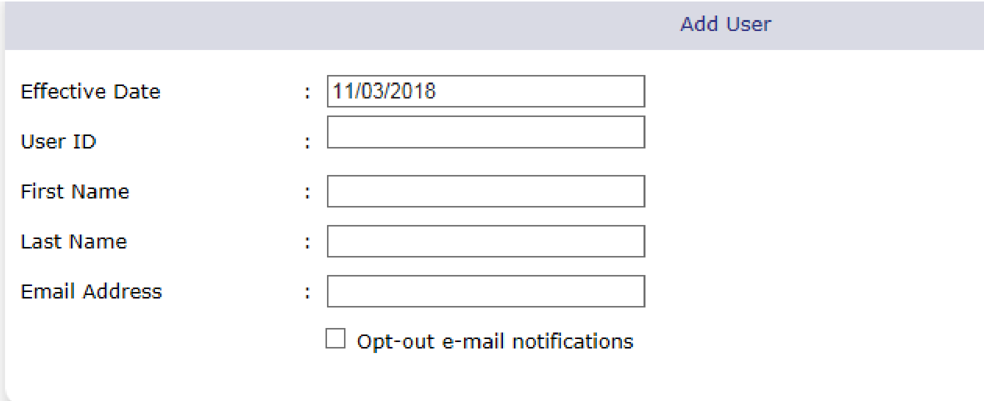
☐ e-Bill Services
☐ Forms Library
☐ Report Portal

	Report Name
☐	Evidence of Insurability Report Last 4 SSN (MLS-02_xe)
☐	MCR-02A_e; Life Paid Claim Detail by Incurred Date
☐	MCR-14_e; Life Insurance Waiver of Premium Report

Add User Screen

To add a new user, please follow these steps:

1. Click **<Add User>** on the USER LISTING screen to open the ADD USER screen.
2. The **ADD USER** screen displays these areas:
    - Identity
    - User Access



Add User

Effective Date : 11/03/2018

User ID :

First Name :

Last Name :

Email Address :

☐ Opt-out e-mail notifications

Identity Section

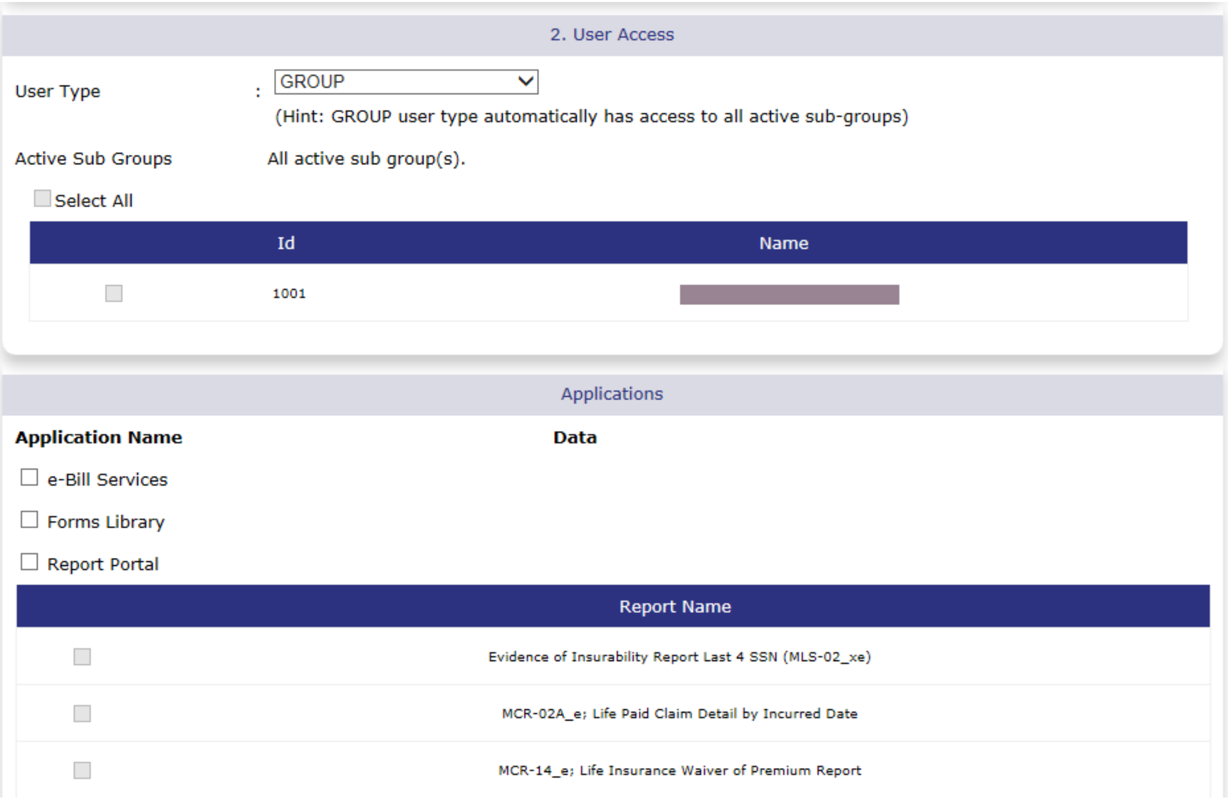
To enter user identity information, please follow these steps:

1. Open the Add User screen.
2. To change the default effective date, click on the EFFECTIVE DATE field and type in a future date in mm/dd/yyyy format.
3. To keep the default effective date, click on the USER ID field
4. Type a valid user id into the USER ID field. User ids must be at least 8 characters in length. User ids cannot be modified so be sure they are correct before you select the **Submit** command button.

    > Recommended guidelines for user ids are:
    >
    > The first letter of the user’s first name and the last name.
    >
    > If the first letter of the first name and last name are less than 8 characters, back fill the remaining characters with numeric characters.
    >
    > For example: If user’s name is Alice Blue, user id could be ablue123 or ablue2007.
    >
    > If user’s name is Alice Blueandgold, user id could be ablueandgold (user id can exceed 8 characters.)

5. Click on the FIRST NAME field and type in the user’s actual first name.
6. Click on the LAST NAME field and type in the user’s actual last name.
7. Click on the EMAIL ADDRESS field and type in the user’s actual email address.

Important: The user’s email address is required as the passwords are system generated and sent to the user via email.



2. User Access

User Type : GROUP

(Hint: GROUP user type automatically has access to all active sub-groups)

Active Sub Groups All active sub group(s).

☐ Select All

	Id	Name
☐	1001	[redacted]

Applications

Application Name **Data**

☐ e-Bill Services

☐ Forms Library

☐ Report Portal

	Report Name
☐	Evidence of Insurability Report Last 4 SSN (MLS-02_xe)
☐	MCR-02A_e; Life Paid Claim Detail by Incurred Date
☐	MCR-14_e; Life Insurance Waiver of Premium Report

User Access Section – User Type

To assign user access, please follow these steps:

1. Click on the down arrow of the USER TYPE field to open the drop-down menu list.
2. Select one of the following options:
   - Group – to allow user access to all data within your organization as well as all available eBill Services system functionality.
   - Subgroup – to limit access to subgroup(s) data only with all available eBill Services functionality.
   - Subgroup Billing – to limit access to only subgroup(s) data and eBill Services billing functionality for List Billed subgroups. This user type will not be able to access Self Billed subgroups in the eBill Services system.
   - Subgroup Enrollment – to limit access to only subgroup(s) data and eBill Services enrollment functionality for List Billed groups. This user type will not be able to access Self Billed subgroups in the eBill Service system.
3. All user types will be eligible for Forms Library and Report Portal access.

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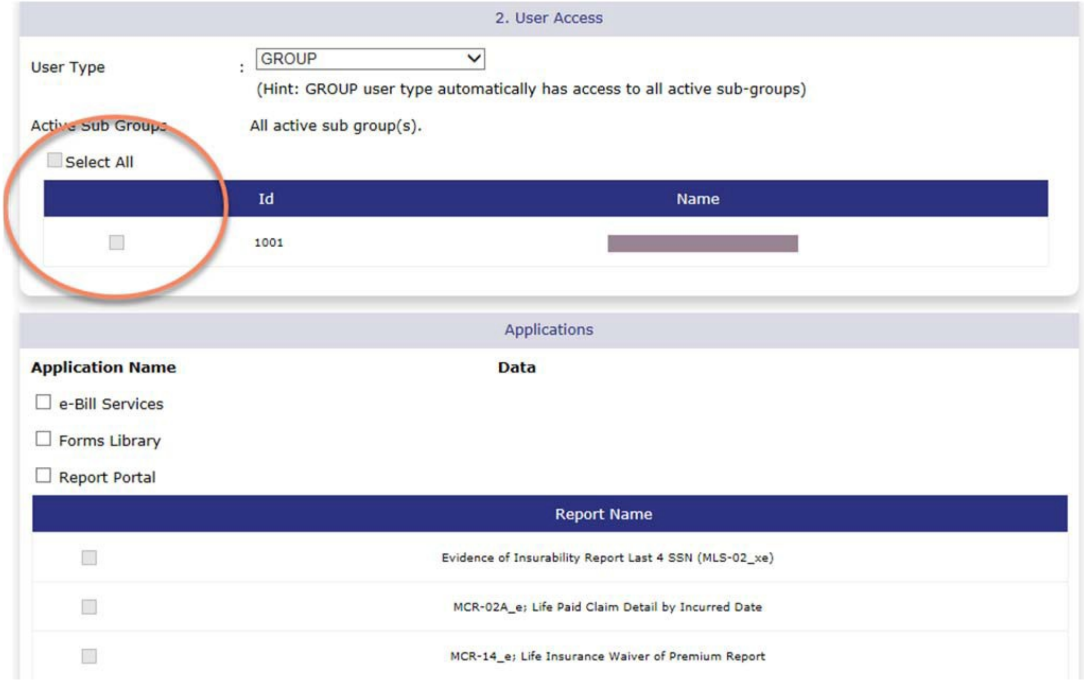


2. User Access

User Type : GROUP

(Hint: GROUP user type automatically has access to all active sub-groups)

Active Sub Groups All active sub group(s).

☐ Select All

	Id	Name
☐	1001	[redacted]

Applications

Application Name	Data
☐ e-Bill Services	
☐ Forms Library	
☐ Report Portal	

	Report Name
☐	Evidence of Insurability Report Last 4 SSN (MLS-02_xe)
☐	MCR-02A_e: Life Paid Claim Detail by Incurred Date
☐	MCR-14_e: Life Insurance Waiver of Premium Report

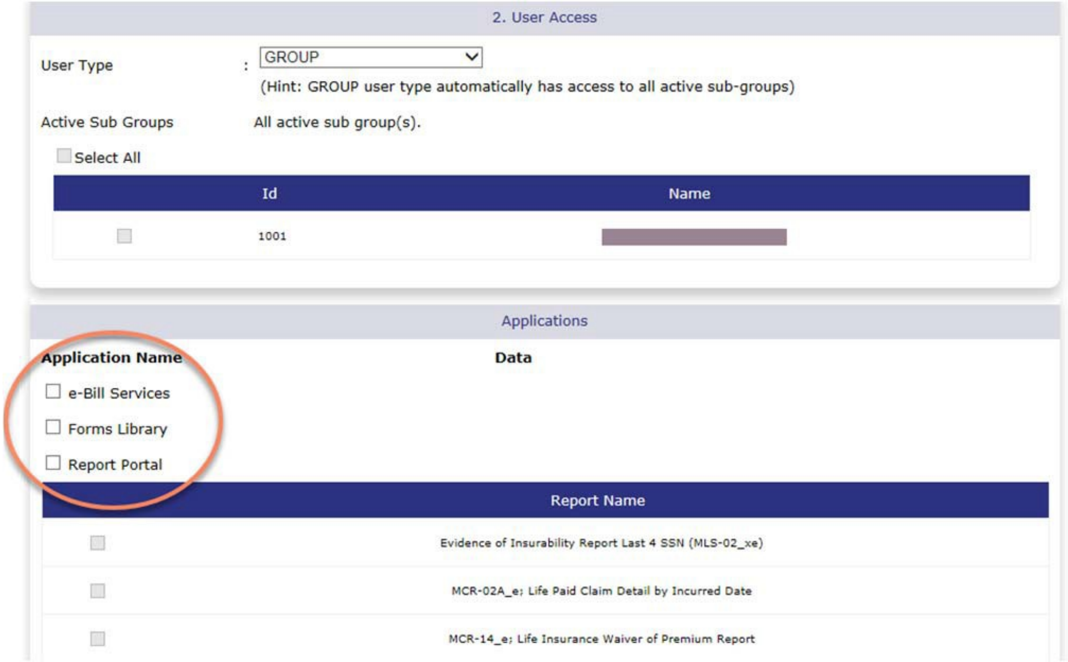
User Access Section – Active Subgroups

If a subgroup user type is selected, please follow these steps:

1. Click on at least one of the checkboxes to the left of the subgroup ID and Name to select the subgroup. You are able to assign more than one subgroup to a user.
2. A checkmark will appear, and the user will only have access to the selected subgroup(s).
3. To select all subgroup, click on the SELECT ALL checkbox.

Continued next page...

Important: If the GROUP user type is selected, all subgroups are automatically selected and will be available to the new user.



2. User Access

User Type : GROUP

(Hint: GROUP user type automatically has access to all active sub-groups)

Active Sub Groups All active sub group(s).

☐ Select All

	Id	Name
☐	1001	[redacted]

Applications

Application Name	Data
☐ e-Bill Services	
☐ Forms Library	
☐ Report Portal	

	Report Name
☐	Evidence of Insurability Report Last 4 SSN (MLS-02_xe)
☐	MCR-02A_e; Life Paid Claim Detail by Incurred Date
☐	MCR-14_e; Life Insurance Waiver of Premium Report

User Access Section – Applications

To assign specific applications to a user, please follow these steps:

1. Click on the checkbox next to the application to select it.
2. If you select the E-BILL SERVICES application checkbox, the user will have access to the on-line billing system.

If you selected User Type:	**Then user will have eBill Services access for:**
Group	All e-Bill functionality for all subgroups within your organization.
Subgroup	All e-Bill functionality for only subgroup(s) specified.
Subgroup Billing	Only billing functionality for the Self Billed subgroup(s) specified. Not applicable to List Billed subgroups.
Subgroup Enrollment	Only enrollment functionality for the List Billed subgroup(s) specified. Not applicable to List Billed subgroups.

Continued next page...

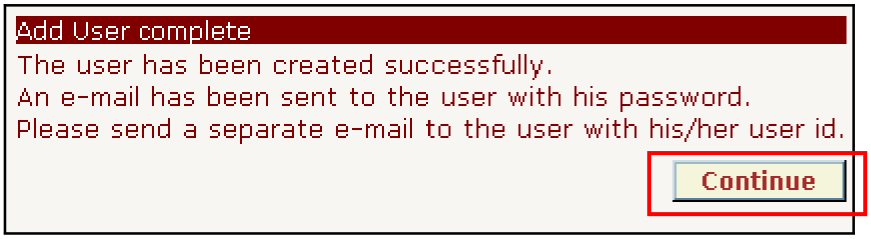
User Access Section – Applications (cont.)

3. If you select the FORMS LIBRARY application checkbox, the user will have access to the online forms. The user will be able to view and print any necessary forms and the Administration Manual.
4. If you select the REPORT PORTAL application checkbox, the user will have access to the online reports. And the report selection checkboxes will become enabled.
5. If you selected the REPORT PORTAL application checkbox, you must select at least one report. A Group user type will have access to all the data for all the subgroups within your organization. Any of the Subgroup user types will be limited to data for only the specified subgroup(s).

Complete the Add User process

To complete the **Add User** process, please follow these steps:

1. Review all the information entered for this user. Verify the USER ID and USER TYPE is correct as these fields cannot be modified later.
2. Click on the **Submit** command button to save the user information entered.
3. Click on the **Cancel** command button to close the ADD USER screen and return to the USER LISTING screen without saving the user information entered.
4. When the user has been created successfully, you will receive the following confirmation message:



Add User complete

The user has been created successfully.
An e-mail has been sent to the user with his password.
Please send a separate e-mail to the user with his/her user id.

5. Click on the **Continue** command button to close the confirmation message and return to the USER LISTING screen.
6. The system generates a random alpha-numeric temporary password and sends it to the user via email.
7. You must notify the user in a separate email of his/her user id.

Note: When the user logs into *eAdministration* using the temporary password, he or she will be prompted to change the password, select a security question and provide a security answer. The security information is used to validate the user when they forget their password.

Section 3: Update User

PURPOSE

This chapter provides detailed information regarding the Update User process. You will be able to modify the following information for an existing user:

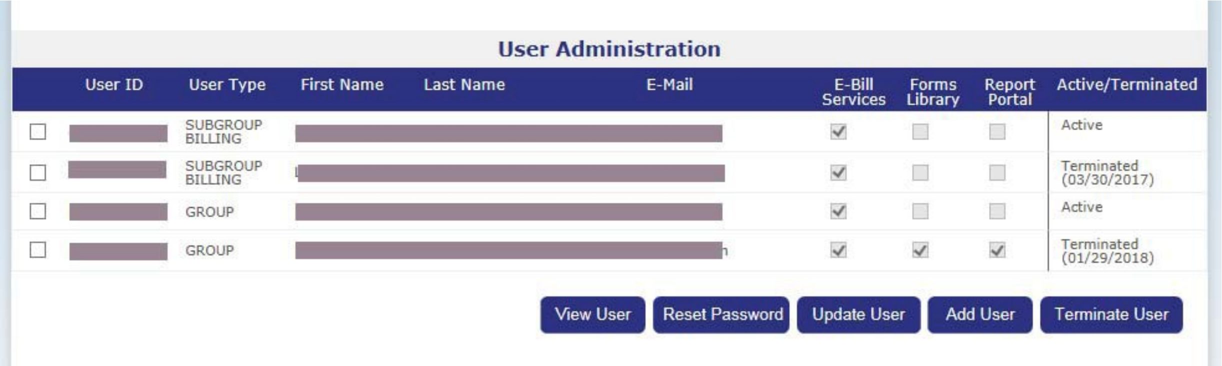
- First and Last Name
- Email address
- Access to active subgroup
- Access to the applications; eBill Services, Forms Library, Report Portal

BEFORE YOU BEGIN

Login to the *eAdministration* system and open the USER LISTING screen.

IN THIS SECTION

The following topics are included in this section:



User Administration

	User ID	User Type	First Name	Last Name	E-Mail	E-Bill Services	Forms Library	Report Portal	Active/Terminated
☐	[redacted]	SUBGROUP BILLING	[redacted]	[redacted]	[redacted]	☑	☐	☐	Active
☐	[redacted]	SUBGROUP BILLING	[redacted]	[redacted]	[redacted]	☑	☐	☐	Terminated (03/30/2017)
☐	[redacted]	GROUP	[redacted]	[redacted]	[redacted]	☑	☐	☐	Active
☐	[redacted]	GROUP	[redacted]	[redacted]	[redacted]	☑	☑	☑	Terminated (01/29/2018)

Update User

To update an existing user, please follow these steps:

1. Click on the USER ADMINISTRATION link at the *eAdministration* HOME screen to open the USER LISTING screen.
2. Click on the checkbox to the left of the user id to select an existing user. A checkmark will appear in the checkbox.
3. Click on the **Update User** command button to open the UPDATE USER screen.
4. The following fields are disabled and display the information entered when the user was set up:
   - Effective Date
   - User ID
   - User Type

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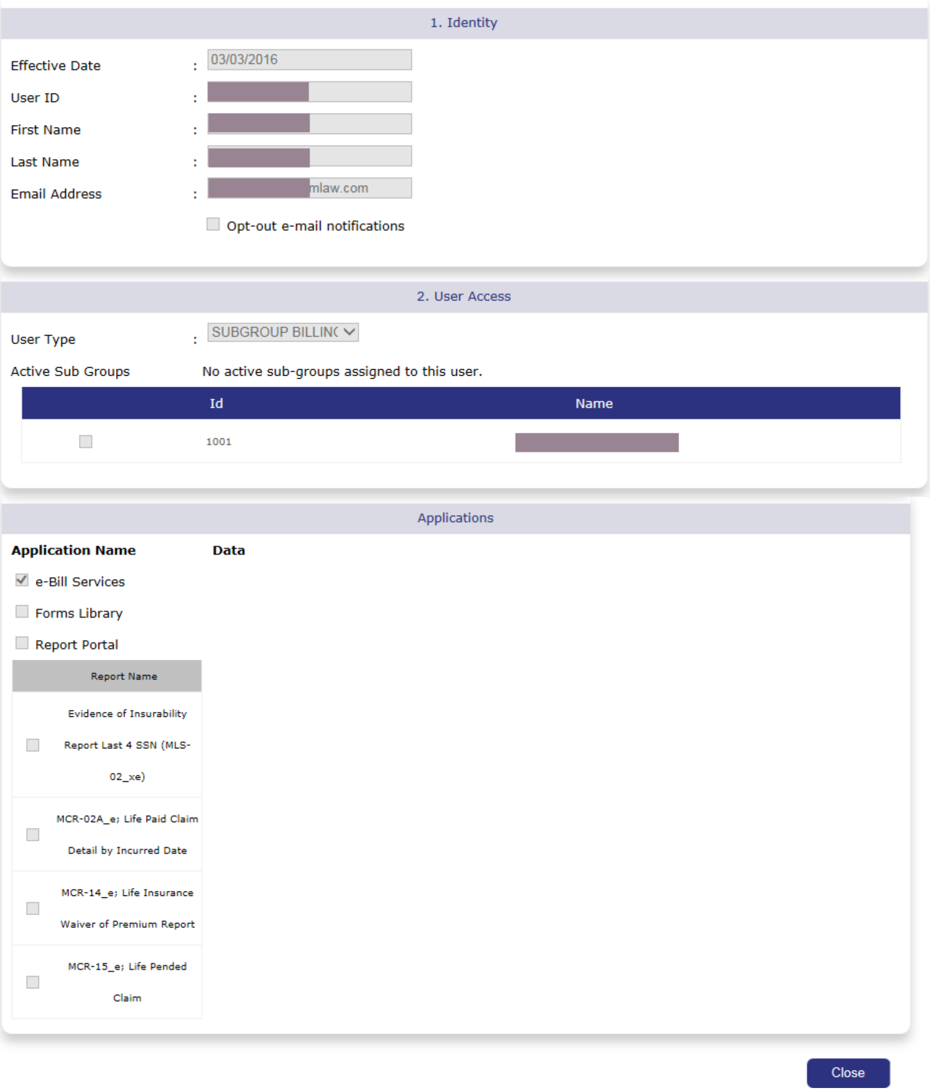

1. Identity

Effective Date : 03/03/2016
User ID : [redacted]
First Name : [redacted]
Last Name : [redacted]
Email Address : [redacted]mlaw.com

☐ Opt-out e-mail notifications

2. User Access

User Type : SUBGROUP BILLIN(
Active Sub Groups No active sub-groups assigned to this user.

	Id	Name
☐	1001	[redacted]

Applications

Application Name **Data**

☑ e-Bill Services
☐ Forms Library
☐ Report Portal

	Report Name
☐	Evidence of Insurability Report Last 4 SSN (MLS-02_xe)
☐	MCR-02A_e; Life Paid Claim Detail by Incurred Date
☐	MCR-14_e; Life Insurance Waiver of Premium Report
☐	MCR-15_e; Life Pended Claim

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Update User (cont.)

5. Click on any of these identity fields to modify the information entered:
   - First Name
   - Last Name
   - Email Address
6. Click on the checked checkbox for an active subgroup or application to remove it. The user will no longer have access to the data for the subgroup or application.
7. Click on the unchecked checkbox for an active subgroup or application to add a checkmark. The user will now have access to that subgroup or application.
8. Click on the SELECT ALL checkbox to check all the subgroups. The user will have access to the data for all the subgroups within your group or organization.
9. Unchecking the REPORT PORTAL application checkbox will remove access to the previously selected reports.
10. Click on an unchecked report to add a checkmark. The user will have access to that report.
11. Click on a checked report to remove the checkmark. The user will no longer have access to that report.

Complete the Update User process

To complete the **Update User** process, please follow these steps:

1. Review all the modifications for this user.
2. Click **<Submit >** to save the modified user information and close the UPDATE USER screen. The USER LISTING screen opens.
3. Click **<Cancel >** to close the UPDATE USER screen and return to the USER LISTING screen without saving the user information entered.

Important: If the EFFECTIVE DATE, USER ID or USER TYPE needs to be changed, you must terminate the old user id and create a new one. See **Section 6: Terminate User** for more detailed information.

Section 4: Miscellaneous Functions

PURPOSE

This section provides detailed information regarding the remaining functions of the User Administration application. You will be able to:

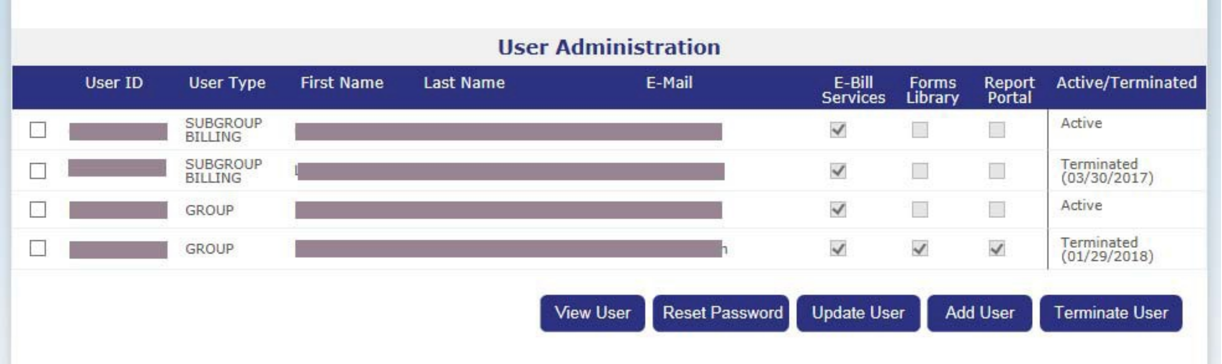
- View the current information for an existing user
- Reset an existing user's password
- Terminate an existing user

BEFORE YOU BEGIN

Login to the *eAdministration* system and open the USER LISTING screen.

IN THIS SECTION

The following topics are included in this section:



User Administration

	User ID	User Type	First Name	Last Name	E-Mail	E-Bill Services	Forms Library	Report Portal	Active/Terminated
☐	[redacted]	SUBGROUP BILLING	[redacted]	[redacted]	[redacted]	☑	☐	☐	Active
☐	[redacted]	SUBGROUP BILLING	[redacted]	[redacted]	[redacted]	☑	☐	☐	Terminated (03/30/2017)
☐	[redacted]	GROUP	[redacted]	[redacted]	[redacted]	☑	☐	☐	Active
☐	[redacted]	GROUP	[redacted]	[redacted]	[redacted]	☑	☑	☑	Terminated (01/29/2018)

View User

If you need to verify the current information for a user, you are able to view this information without going through the UPDATE USER process.

To review information on an existing user, please follow these steps:

1. Click on the USER ADMINISTRATION link at the *eAdministration* HOME screen to open the USER LISTING screen.
2. Click on the checkbox to the left of the user id to select an existing user. A checkmark will appear in the checkbox.
3. Click **<View User>** to open the VIEW USER screen.

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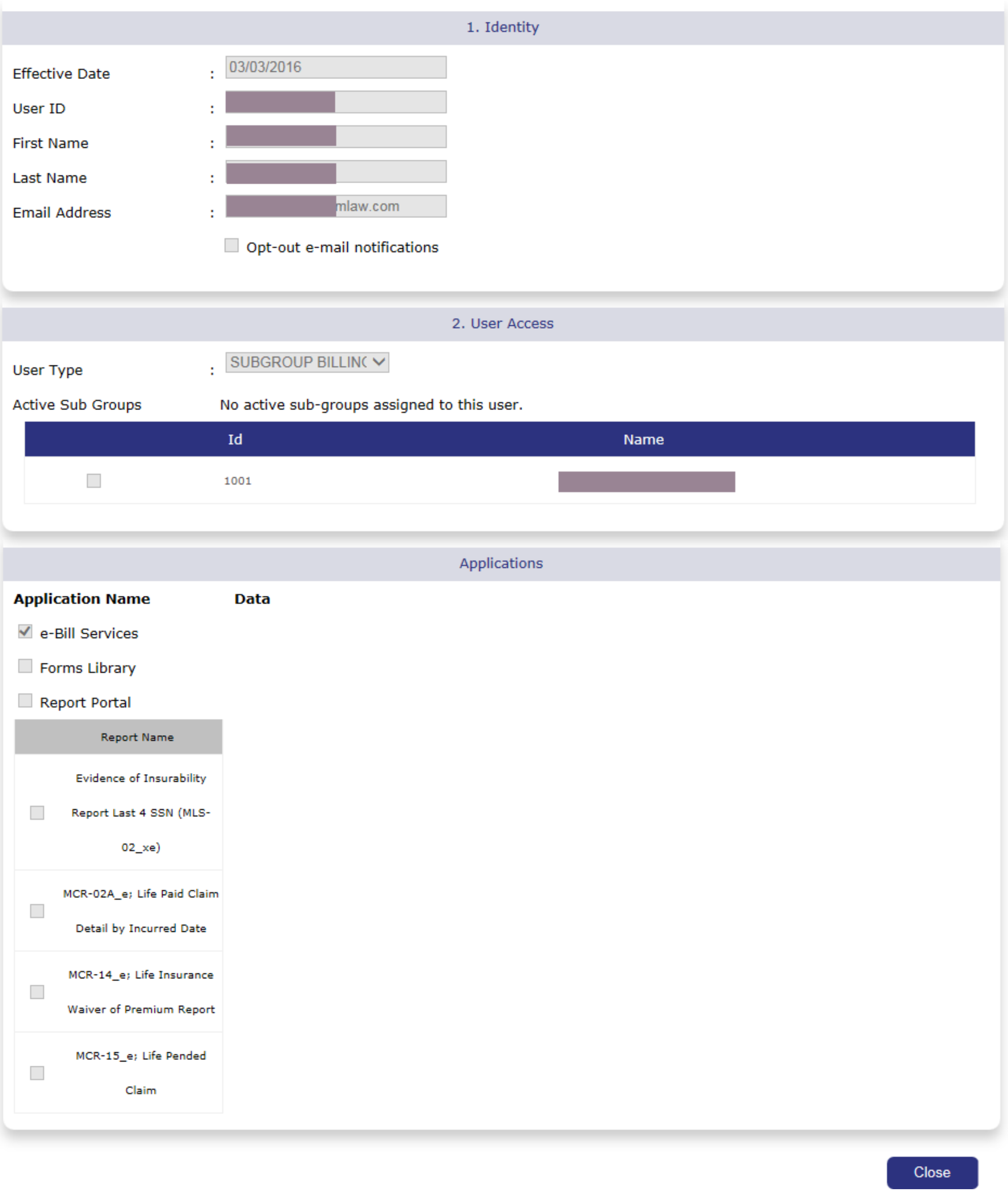


1. Identity

Effective Date : 03/03/2016
User ID : [redacted]
First Name : [redacted]
Last Name : [redacted]
Email Address : [redacted]mlaw.com
☐ Opt-out e-mail notifications

2. User Access

User Type : SUBGROUP BILLIN(
Active Sub Groups No active sub-groups assigned to this user.

	Id	Name
☐	1001	[redacted]

Applications

Application Name **Data**

☑ e-Bill Services
☐ Forms Library
☐ Report Portal

	Report Name
☐	Evidence of Insurability Report Last 4 SSN (MLS-02_xe)
☐	MCR-02A_e; Life Paid Claim Detail by Incurred Date
☐	MCR-14_e; Life Insurance Waiver of Premium Report
☐	MCR-15_e; Life Pended Claim

View User (cont.)

4. All the fields on this screen are disabled and display the current information for the user selected on the USER LISTING screen.
5. Click **<Close >** to close the VIEW USER screen and return to the USER LISTING screen.

Reset Password

If the user is locked out of the login process, it may be necessary for you to assist them in resetting their password.

To reset a password for an existing user, please follow these steps:

1. Click on the USER ADMINISTRATION link at the *eAdministration* HOME screen to open the USER LISTING screen.
2. Click on the checkbox to the left of the user id to select an existing user. A checkmark will appear in the checkbox.
3. Click **<Reset Password>** and the system will generate a new password for the user.
4. The following confirmation message will display:

Reset Password complete

The user password has been reset and an e-mail has been sent to the e-mail address on file.

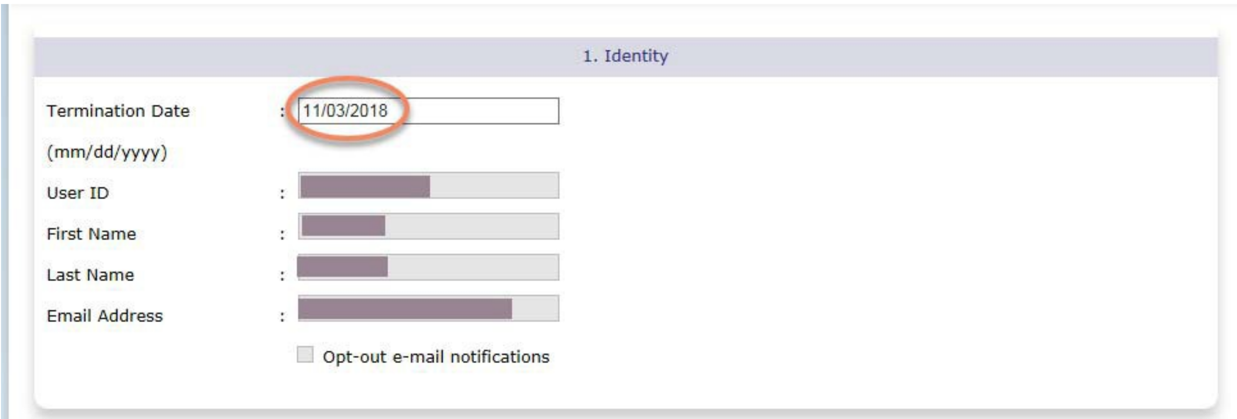
5. The user will receive an email with the system-generated temporary password.
6. Click **<Continue >** to close the confirmation message and return to the USER LISTING screen.

Terminate User

It may be necessary to terminate users that are no longer with your organization or if the EFFECTIVE DATE, USER ID or USER TYPE for an existing user needs to be corrected.

To terminate an existing user, please follow these steps:

1. Click on the USER ADMINISTRATION link at the *eAdministration* HOME screen to open the USER LISTING screen.
2. Click on the checkbox to the left of the user id to select an existing user. A checkmark will appear in the checkbox.
3. Click **<Terminate User>** to open the TERMINATE USER screen.



1. Identity

Termination Date (mm/dd/yyyy) : 11/03/2018

User ID : [redacted]

First Name : [redacted]

Last Name : [redacted]

Email Address : [redacted]

☐ Opt-out e-mail notifications

4. The TERMINATE USER screen opens with only the TERMINATION DATE field enabled. The other fields are disabled and display current user information.
5. Click on the TERMINATION DATE field to enter a valid date in mm/dd/yyyy format.
6. If the default date is correct, you do not need to enter a new date.
7. Click **<Cancel >** to return to the USER LISTING screen without terminating the user.
8. Click **<Submit >** to save the termination date.

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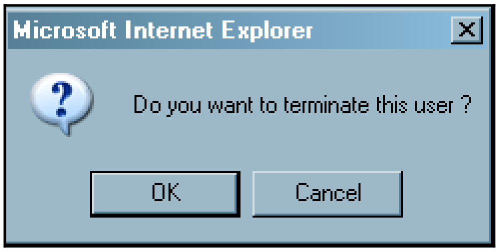
Terminate User (cont.)

9. The following confirmation message will display in a separate window:



Do you want to terminate this user ?

10. Click **<Ok >** to terminate the user and return to the USER LISTING screen.
11. Click **<Cancel** to close the confirmation message and return to the TERMINATE USER Screen.