eAdministration User Guide Self Billing

New York

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CHAPTER 1: E-BILL SERVICES SYSTEM

PURPOSE	This chapter provides detailed information on opening and closing the online-billing system.
	We have 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.

E-B ILL SERVICES SYSTEM

Open e-Bill Services

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

- 1. Log into the *eAdministration* system.
- 2. The HOME menu displays a list of menu options and applications.
- 3. Click on the e-Bill Services link.

-	Home	-Bill Services	Forms Library	Report Portal	My Profile	User Administration	Change Password	Log out
						istration.		
			Pleas	e make a select	tion from the	menu above		
			GROUPS SC		s and dis	menu above. plays a table li gned to your υ		
			GROUPS SC	creen open	s and dis	plays a table li		oup ID/Nan
			GROUPS SC	creen open	s and dis	plays a table li	ISER ID.	oup ID/Nan

5. Click on the appropriate <u>SUBGROUP ID</u> or <u>NAME</u> link to open the e-Bill Services WELCOME screen. See below for an example of the Welcome screen.

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.



- Premium Mailing Address
- Billing Department

<u>Exit</u>

To close out of the E-BILL SERVICES system, please follow these steps:

- 1. Click on the Exit 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 2: SELF-BILL E-BILL PROCESSING

PURPOSE	This chapter provides detailed information regarding our online billing for Self Billed groups. We 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 1: E-Bill Services System, Section 1: Access e-Bill Services.

Section 1: **Update Invoice** PURPOSE This section provides detailed information about updating a Self Bill invoice. You will receive an e-mail from us 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 our billing department at: 1-866-322-1210. At the prompt, select #1 for billing issues. **BEFORE YOU BEGIN** Login to the e-Bill Services system.

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 <u>Subgroup ID</u> or <u>Subgroup Name</u> to open the WELCOME TO BILLING screen.

Welcome,

AMERICAN COU... Home Select Subgroup Add Subscriber Update Subscriber View/Update Invoice Payment History Change Password Contact Us Log Off

		View Invoi	ices		
Group ID :					
ubgroup ID :					
Group :					
ubgroup :					
		Current Invo	ices		
Invoice ID	Due Date	Invoice Period	Billed Amount	Balance Due	
Invoice ID	Due Date	Invoice Period	Billed Amount	Dalance Due	
201970000091	08/01/2020	08/01/2020 - 08/31/2020	\$106.25	\$106.25	Update
		Historical Inv	nices		
Invoice ID	Due Date	Invoice Period		d Amount	Balance Du
201670000307	07/01/2020	07/01/2020 - 07/31/2020	Dille	\$101.51	\$101.
201360000170	06/01/2020	06/01/2020 - 06/30/2020		\$101.51	\$101.
201060000212	05/01/2020	05/01/2020 - 05/31/2020		\$101.51	\$23.3
200750000037	04/01/2020	04/01/2020 - 04/30/2020		\$101.51	\$0.0
200470000037	03/01/2020	03/01/2020 - 03/31/2020		\$101.51	\$0.0
					\$0.0
200150000190	02/01/2020	02/01/2020 - 02/29/2020		\$101.51	\$0.t
200150000190 193490000046	02/01/2020 01/01/2020	02/01/2020 - 02/29/2020 01/01/2020 - 01/31/2020		\$101.51 \$128.32	
					\$0.0
193490000046	01/01/2020	01/01/2020 - 01/31/2020		\$128.32	\$0.0 \$0.0 \$0.0
193490000046 193190000224	01/01/2020 12/01/2019	01/01/2020 - 01/31/2020 12/01/2019 - 12/31/2019		\$128.32 \$128.32	\$0.0 \$0.0
193490000046 193190000224 192880000255	01/01/2020 12/01/2019 11/01/2019	01/01/2020 - 01/31/2020 12/01/2019 - 12/31/2019 11/01/2019 - 11/30/2019		\$128.32 \$128.32 \$128.32	\$0.0 \$0.0 \$0.0

Manage Payment Method Pay Invoice Download to Excel

Welcome,

AMERICAN COU... Home Select Subgroup Add Subscriber Update Subscriber View/Update Invoice Payment History Change Password Contact Us Log Off
View Invoices

Group ID : Subgroup ID : Group : Subgroup :

		Current Invoice	S		
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 Invoic	es		
Invoice ID	Due Date	Invoice Period	Bille	d 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
20075000037	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
<u>193490000046</u>	01/01/2020	01/01/2020 - 01/31/2020		\$128.32	\$0.00
<u>193190000224</u>	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
<u>192580000046</u>	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
			Manage Payment Metho	d Pay Invoice Do	wnload to Excel

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.

	Select Subg	roup	View/Update	Invoice	Payment Histo	ory C	hange Password	Contact	Us Log
			U	pdate 1	Invoice D	etail	Clic	:k here to see upd	late invoice instructio
Invoice Summary Total Billed Amou Total Retro Amou Total Premium Do	unt : \$3,26 unt : \$0.00		-		Invoice# Invoice Date Coverage Per Group ID Subgroup ID Due On	: 1 iod : 1 : 3 : 1	8305000000 1/01/2018 1/01/2018 - 11/3 05144 002 Iovember 01, 201		
				Recon	ciled Invoice	es			
Plan Description	Prior Period Count	Current Period Count	Prior Period Volume	Curr Per Volu	iod 🔵 Rate	Prior Period Total Due	Current Period Total Due	Override Requested	Enter Ret Adjustme (premium onl + or
Basic Life	45	45	\$4,958,900	4,958,9	\$0.150000	\$743.84	743.84		0.0
Basic AD&D	45	45	\$4,858,700	4,858,7	\$0.020000	\$97.17	97.17		0.0
Supplemental Life 0-24	0	0	\$0		0 \$0.090000	\$0.00	0.00		0.0
Supplemental Life 25-29	0	0	\$0		0 \$0.090000	\$0.00	0.00		0.0
Supplemental Life 30-34	0	0	\$0		0 \$0.100000	\$0.00	0.00		0.0
Supplemental Life 35-39	3	3	\$300,000	300,0	\$0.110000	\$33.00	33.00		0.0
Supplemental Life 40-44	3	3	\$240,000	240,0	\$0.160000	\$38.40	38.40		0.0
Supplemental Life 45-49	2	2	\$20,000	20,0	\$0.270000	\$5.40	5.40		0.0
Supplemental Life 50-54	2	2	\$600,000	600,0	\$0.450000	\$270.00	270.00		0.0
Supplemental Life 55-59	2	2	\$170,000	170,0	\$0.740000	\$125.80	125.80		0.0
Supplemental Life 60-64	1	1	\$100,000	100,0	\$0.810000	\$81.00	81.00		0.0
Supplemental Life 65-69	1	1	\$65,000	65,0	\$1.260000	\$81.90	81.90		0.0
Supplemental Life 70-74	0	0	\$0		0 \$2.040000	\$0.00	0.00		0.0
Supplemental Life 75+	0	0	\$0		0 \$4.510000	\$0.00	0.00		0.0
Supplemental AD&D - EE	14	14	\$1,495,000	1,495,0	\$0.020000	\$29.90	29.90		0.0

- 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 and 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.

		Current Period	Due: \$3,267.88
Calculate Premiums Due Save As I	Oraft Submit Final Invoice	Download to Excel	Return To List

8. Click on the checkbox under the OVERRIDE REQUEST column for the Plan Description <u>only</u> if one of the following circumstances applies:

				Reconcile	ed Invoice	s			
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

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 <u>very important</u> that you do not unselect this check box.

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

- 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
Calculate Premiums Due	Save As Draft	Submit Final Invoice	Download to Excel	Return To List

- 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.

		View Invoice	S	
Froup ID :				
Subgroup ID :				
Group :				
ubgroup :				
		Current Invoice	5	
Invoice ID	Due Date	Invoice Period	Billed Amount	Balance Du
202290001018	09/01/2020	09/01/2020 - 09/30/2020	\$1,009.20	\$593.8
		Historical Invoice	es	
Invoice ID	Due Date	Invoice Period	Billed Amount	Balance Du
201970001340	08/01/2020	08/01/2020 - 08/31/2020	\$975.12	\$0.
201670001288	07/01/2020	07/01/2020 - 07/31/2020	\$955.04	\$0.
201360000966	06/01/2020	06/01/2020 - 06/30/2020	\$967.12	\$0.
201060001028	05/01/2020	05/01/2020 - 05/31/2020	\$967.12	\$0.
200750001087	04/01/2020	04/01/2020 - 04/30/2020	\$907.22	\$0.
200470001350	03/01/2020	03/01/2020 - 03/31/2020	\$751.03	\$0.
200360000326	02/01/2020	02/01/2020 - 02/29/2020	(\$382.54)	\$0.
193490001198	01/01/2020	01/01/2020 - 01/31/2020	\$2,002.87	\$0.
193190001428	12/01/2019	12/01/2019 - 12/31/2019	\$2,216.48	\$0.
192880001571	11/01/2019	11/01/2019 - 11/30/2019	\$2,102.76	\$0.
	10/01/2019	10/01/2019 - 10/31/2019	\$2,310.05	\$0.
192580001325				

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 <u>invoice ID</u> to open the Invoice Detail screen. You will be able to view the invoice summary information for the selected invoice ID.

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	n 3: Pay	nvoice		
		View Invoices		
Group ID :				
Subgroup ID :				
Group :				
Subgroup :				
5 1				
		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
<u>193490001198</u>	01/01/2020	01/01/2020 - 01/31/2020	\$2,002.87	\$0.00
<u>193190001428</u>	12/01/2019	12/01/2019 - 12/31/2019	\$2,216.48	\$0.00
<u>192880001571</u>	11/01/2019	11/01/2019 - 11/30/2019	\$2,102.76	\$0.00
<u>192580001325</u>	10/01/2019	10/01/2019 - 10/31/2019	\$2,310.05	\$0.00
<u>192270001499</u>	09/01/2019	09/01/2019 - 09/30/2019	\$2,351.55	\$0.00
		_		

Manage Payment Method Pay Invoice Download to Excel
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 bycheck.
 - Make Online Payment to pay online, using e-Bill's secured screens.
 - Scheduled Direct Debit ACH to schedule monthly payments based upon "Payment Date" selection during the setup process, on either the 10th or the 25th calendar day of the month.

		Payment	t Op	tions	
Group ID :					Amount Due : \$2,326.9
Group :					
Subgroup ID :					
Subgroup :					
Get Adobe Reader Print	Remittance Form	Make Online Paymer	nt	Return to View Invoices	

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).

		-
Premium Invoice Remittance Summary		
ABC, INC	Group ID: 300000	
SUBOROUP NO. THREE 1234 APPLE STREET ANYVHERE, MN 55555-4444	Subgroup ID: 2003	
Payment Due Date :6/1/2007		
	071340000006 4/1/2007 - 4/30/2007 071570000087 5/1/2007 - 5/31/2007	\$29.50 \$143.45
	071730000013 6/1/2007 - 5/30/2007	\$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 2445 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		
Mater Mary mount have Aslaha	A such as Data day in stalland any second as second star to se	the second second second second

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

Continued on next page...

- 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 Unimerica Life Insurance Company of New York and mail your payment to the address provided at the bottom of the invoice.
- 8. Or, for Overnight payments use the following address:

Unimerica Life Insurance Company of New York Lockbox 860511 1200 Energy Park Drive St. Paul, MN 55108

- 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 On-line 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 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

Group ID	-		Due Date	Total Amount Du
Group Name	:		09/01/2020	\$7,528.
Subgroup ID	:			
Subgroup Name	:			
Amount Due	:	\$7,528.07		
Date to Submit Payment	:			
Payment Amount	:			
Bank Name	:	Old		
Account Number	:	#####		
Routing Number	:	#####		
in e-Bill the next busi	ness nd h	Submit Payment Cancel same day that are made prior to 3:30 PM CT will be credited day. Payments requested for the same day that are made o ave a receipt date in e-Bill two business days later. When sel e credited on the same day and show a receipt date in e-Bill t	n or after 3:30 PM CT ecting a future paym	will be credited to your ent date, your account will

- 3. The BANK NAME, ACCOUNT NUMBER and ROUTING NUMBER fields are populated with your bank information when you have set up this option with our Billing Department. You will <u>not</u> 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 Billing Department. You will not be able to continue with the on-line payment process.

Continued on next page

- 5. Verify the amount due matches the outstanding amount due for all your on-line invoices. If there is a discrepancy, contact our 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 our Billing Department.

Important: This must be a business day. The current date is populated by default. Click on the \geq 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.

	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	: •
	Back To View Invoice

- 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 to the VIEW INVOICES screen.

Section 4: Payment History

	Select Subgroup	View/Update Invoice	Payment History	Change Password Co	ntact Us Log
		Payn	nent History		
Group ID	:				
Subgroup ID	:				
Group Name	:				
Subgroup Name	:		1		
		His	story Details		
Received Da	ite Payn	nent Method	Receipt Type	Check Numbe	er Amoun
10/17/2018	Bank	Draft	Payment		\$2,691.2
09/20/2018	Bank	Draft	Payment		\$3,015.4
08/18/2018	Bank	Draft	Payment		\$3,082.8
07/27/2018	Bank	Draft	Payment		\$3,006.6
06/20/2018	Bank	Draft	Payment		\$3,043.1
05/23/2018	Bank	Draft	Payment		\$2,999.3
04/13/2018	Bank	Draft	Payment		\$2,988.4
03/20/2018	Bank	Draft	Payment		\$2,991.9
02/23/2018	Bank	Draft	Payment		\$2,991.9
01/12/2018	Bank	Draft	Payment		\$2,991.9
12/15/2017	Bank	Draft	Payment		\$2,991.9
11/09/2017	Bank	Draft	Payment		\$3,186.1

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 we have received your online or mailed payment. For mailed payments, be sure to allow at least one week for mailingtime.

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 3: 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 our *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.

Home e-Bill Ser	rvices Forms Libr	ary Report Portal	My Profile	User Administration	Change Password	Log out
username	Forms					
Home Log out	Contract Situs State	MINNESOTA		*		
Change Password e-Bill Services Forms Library	Underwritting Company	United Healthcare In	isurance Compan	y 🔽 *		
Report Portaĺ	Category		•	1		
	Form					
	Important Note:	assigned to your use	r id. Some of the	n the situs state and u se forms may not be a ct associated with the	pplicable. Please con	firm that your grou
	Actions	policy and individual				···· , ··· , ··· ,
	Search	$\mathbf{>}$				
	Results					
	Name				Category	
		n Manual (All Sections)			Administration Manual	
		n Manual (Critical Illnes			Administration Manual	
		<u>n Manual (e-Bill System</u>			Administration Manual	
		n Manual (EAP Section)	•		Administration Manual	
		n Manual (Life Policies :			Administration Manual	
		n Manual (List Bill e-Bill		on)	Administration Manual	
	<u>Administratio</u>	n Manual (List Billed Gr	oup Section)		Administration Manual	
	<u>Administratio</u>	n Manual (LTD Section)			Administration Manual	
	<u>Administratio</u>	n Manual (On-line Form	<u>is Section)</u>		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 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 userID)
 - Report Portal (if assigned to the userID)
- 3. Click on the Forms Library link to open the FORMS screen.
- 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.

Continued on next page...

	/apps.unimerica.com/OnLineForms/OnlineFormsDocuments/100-5476_Unimerica_Pr	pof_of_Death.p - Microsoft			
File E	File Edit GoTo Favorites Help				
Bac	k 🔹 🕗 👻 🛃 🚮 🔎 Search 👷 Favorites 🚱 😒 🍛 🔜	<mark>_</mark> 12 - 28			
Address	https://apps.unimerica.com/OnLineForms/OnlineFormsDocuments/100-5476_Unimerica_Proof_	f_Death.pdf			
🛛 🔚 Save	a Copy 🚔 🧮 🦓 👔 Search 🛛 🕐 🗈 Select 📷 🔍 + 🚺 💀 G	119% · · ·			
Pages					
	PROOF OF DEATH FOR GROUP INSURA	NCE			
Sector 2	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 insurance company files a or misleading information under law.			
(m)	SECTION 1				
Attachments	CLAIMANT'S S	GNATURE			
Atta	I hereby make claim for the death benefits on the life of				
Comments	under Group Policy Number	S.S. Number			
Com	If a dependent, name of insured				
	Address				
	10f2				
Done					

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.

	db02:808170nLin GoTo Favorites	Forms/UploadFiles/100-5476_Unimerica_Pro Help	oof_of_Death.pdf - Microsoft In	
New Open	Ctrl+O] 🐔 🔎 Search 🥁 Favorites 🧔	2• 🕹 🖬 🛄	
Save As		OnLineForms/UploadFiles/100-5476_Unimerica_Proo	f_of_Death.pdf	
Page Setup Print	ctrl+P	👔 🕅 🚺 🚺 Select 📷 🛛 🔍 - 🚺	•• • 100% • •	
Send	٠			
Import and	Export			
Properties				
Work Offlin	e			
Close				
2	Unimerica Insurance	Company		
Comments	PROOF (F DEATH FOR GROUP INS	URANCE	
Con	INSTRUCTIONS			
	1. Claimant plea	se fill in and sign section below. h Certificate must be included in proofs.	Any person who knowing insurance company files	
		f police report, if accidental	or misleading information	
		1 of		
	Ν.			

- 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.

username Home Log out Change Password e-Bill Services Forms Library	Forms Contract Situs State Underwritting Company	MINNESOTA •*
Report Portal	Category Form Important Note: Actions Search Results	Administration Manual Beneficiary Forms Claim Forms Conversion & Portability Forms Do Not Use Enrollment Forms Evidence of Insurability (EOI) Forms Miscellaneous

Search on a Category

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.

Forms		
Contract Situs State	MINNESOTA *	
Underwritting Company	United Healthcare Insurance Company	*
Category	Claim Forms	
Form		
Important Note:	assigned to your user id. Some of these forms r	s state and underwriting company for the group nay not be applicable. Please confirm that your group ted with the form prior to using. Refer to your group
Actions		
Search		
Results		
Name		Category
Claimant Stat	tement for STD/LTD	Claim Forms
Critical Illnes	s Claim Form Package	Claim Forms
Critical Illnes	s Health Screening Benefit Claim Form	Claim Forms
LTD Claim Pa	<u>ckage</u>	Claim Forms
STD Claim Pa	<u>ckage</u>	Claim Forms
United Health	Care Notice of Claim for Accelerated Benefits	Claim Forms
United Health	Care Proof of Death for Group Insurance	Claim Forms
United Health	Care Statement of Claim for Accidental Dismember	r <u>ment</u> Claim Forms
United Health	Care 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.
Actions	
Search	
Results	
Name <u>STD Claim Pa</u>	Category ckaqe 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.

Username Home Log out Change Password e-Bill Services Forms Library Report Portal	Forms Contract Situs State Underwritting Company Category Form Important Note:	MINNESOTA Wiscellaneous 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.
	Actions	
	Search	
	Results	
	Name <u>Electronic Pa</u>	Category yment 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 <u>Electronic Payment Authorization Form</u> 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 4: REPORT PORTAL SYSTEM

PUR	POSE		This chapter provides detailed information regarding the Report Portal system on our <i>eAdministration</i> website. We have developed several reports that are accessible through our website. As an external user, the user ID assigned to you will identify the appropriate Group/subgroup necessary to create the available reports.
BEFC	ORE YOU BE	GIN	Login to the <i>eAdministration</i> HOMEscreen.
<u>Home</u>	e-Bill Services F	orms Library	Report Portal My Profile User Administration Change Password Log out

Welcome user <u>Exit</u>	rname	
		n arrow below to view a report. If the report has Excel formatting available, a checkbox will appear to allow you ne 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
L		

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)
- 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 yourgroup.
- 5. Click on the green arrow to the left of the report name to open the report parameter screen.

Return To Report List Exit						
Group Name ABC COMPANY Incurred Start Date	NULL	Subgroup Incurred End Date	1002 ABC COMPAN		Vi	ew Report
I I of 15 ▶ ▶ I 100% ▼	Find Next	Select a format	토 Export	Ø 🎒		*
	Life Paid Cla	aim Repo	rt			*
	Detail of all sele	cted accounts				
Group Number: 300000 Group Name: ABC COMPANY	Y					
Subgroup Number: 1002 Subgroup Name: ABC COMPANY	Y SUBGROUP TWO					
Incurred Dates: -						
Claim ID Benefit	Incurred Date Received D	ate 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 prepopulated with the subgroups associated with your user ID.
- 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.



Continued on next page ...

- 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 Incurred Start Date	Subgroup 1002 ABC COMPANY SUBGROUP T
4 4 1 of 15 ▶ ▶ 100% ▼ F	ind Next Select a format 💽 Export 🔮 🎒

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 I to move to the next page
 - Click on the left arrow down to the previous page
 - Click on the right arrow with a barafter it Ito jump to the last page
 - Click on the left arrow with a bar before it to jump III to the first page
- 2. Or, click on the page field and type a page number to jump $\begin{bmatrix} 2 & \text{of } 15 \end{bmatrix}$ 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.

Select a format 💽	Export	¢	
Select a format XML file with report data CSV (comma delimited) TIFF file Acrobat (PDF) file Web archive Excel			

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



- 10. To close the report portal, click on the <u>Exit</u> 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 LOG IN screen displays.

CHAPTER 5: 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.

Section 1: User Listing

User ID	User Type	First Name	Last Name	E-Mail	E-Bill Services	Forms Library	Report Portal	Active/Terminated
	SUBGROUP BILLING				>			Active
	SUBGROUP BILLING				V			Terminated (03/30/2017)
	GROUP				~			Active
	GROUP			'n	1	~	4	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 Us | ser |
|-------------------------|---|
| PURPOSE | This section provides detailed information regarding howto add a new user. |
| BEFORE YOU BEGIN | Login to the e <i>Administration</i> system and open the User
Listing screen by clicking on the User Administration
link. |

StrUcks Birling Advice StrUcks Birling Advice StrUcks W W Terminated provide advice StrUcks Update User Advice Terminated user GROUP W W W Terminated user Convertige Wew User Reset Password Update User Terminate User Image: Struck advice Image: Struck advice Terminate User Terminate User Image: Struck advice Image: Struck advice Terminate User Terminate User Image: Struck advice Image: Struck advice Terminate User Terminate User Image: Struck advice Image: Struck advice Terminate User Terminate User Image: Struck advice Struck advice Image: Struck advice Struck advice Terminate User Image: Struck advice Stru										
SBEENCOUP SBEENCOUP SBEENCOUP SBEENCOUP GROUP GROUP GROUP GROUP GROUP GROUP GROUP Adve Torrisation Very User Reset Password Update User Add User Torrisation uses Torrisation Torris				Us	ser Admini	stration				
BILLING	User ID	User Type	First Name	Last Name		E-Mail	E-Bill Services	Forms Library	Report Portal	Active/Terminat
GROUP GROUP GROUP Create data GROUP Create data		SUBGROUP BILLING					1			Active
GROUP Active GROUP Course GROUP Course Create Passwort Update User Add User Course Effective Date : [1032018 Uer To : [1032018 East Name : [1032018 East Name : [1032018 East Name : [1032018 Cher Type : [1032018 Cher Type : [1032018 East Name : [1032018 East		SUBGROUP	1				1			Terminated (03/30/2017)
Circlewide Circlewide Circlewide <td></td> <td>GROUP</td> <td></td> <td></td> <td></td> <td></td> <td>1</td> <td></td> <td></td> <td></td>		GROUP					1			
Add User Effective Date Wer ID User ID Hint Name Imail Address Imail Address <td></td> <td>GROUP</td> <td></td> <td></td> <td></td> <td>'n</td> <td>4</td> <td>\checkmark</td> <td>~</td> <td>Terminated (01/29/2018)</td>		GROUP				'n	4	\checkmark	~	Terminated (01/29/2018)
Effective Date : User ID : First Name : Last Name : Email Address : Dopt-out e-mail notifications Lest Type (Hint: GROUP user: yee automacally has access to all active sub-groups) Cative Sub Groups All active sub group(s). Select All Applications Name 0 201 Applications Name Date e Jill Services Porms Library Report Portal Evidence of Insurability Report Last 4 SEN (NLS+92_a/s) Insurability Report Data bits Insurability Report Last 4 SEN (NLS+92_a/s)					View User	Reset Password	Update Use	er A	dd User	Terminate User
User ID					Add User					
First Name	Effe	ective Date	: 11/03/2018							
Last Name	Use	er ID	:							
Email Address										
Image: construction of the construc										
Luser Access User Type (Hint: GROUP user type automatically has access to all active sub-groups) Active Sub Groups All active sub group(s). Select All 1 1 1 Applications Applications Porms Library Report Portal MCR-02A_et: Life Pad Claim Detail by Incurred Data	Em	all Address		e-mail notifications						
User Type : GROUP (Hint: GROUP user type automatically has access to all active sub-groups) Active Sub Groups All Id Name 1001 Application Name Points Library Porms Library Report Portal Evidence of Insurability Report Last 4 SN (MLS-02_me)										
Over Type : (IInt: GROUP user type automatically has access to all active sub-groups) Active Sub Groups All active sub group(s). Select All 1001 Application Name Oata e-Bill Services Forms Library Report Portal Evidence of Insurability Report Last 4 SSN (MLS-02_ve) MCR-024_e: Life Paid Claim Detail by Incurred Date					2. User Access					
Active Sub Groups All active sub group(s). Select All Id Name 1001 Application Name Oata e-Bill Services Forms Library Report Portal Evidence of Insurability Report Last 4 SSN (MLS-02_va) MCR-02A_er, Life Paid Claim Detail by Incurred Date	Use	er Type				e to all active cub erouse				
Id Name 101 Application Name Oata e-Bill Services Forms Library Report Portal Evidence of Insurability Report Last 4 SSN (MLS-02_xe) MCR-02A_er, Life Paid Claim Detail by Incurred Date	Act	ive Sub Groups			natically has acces	s to an active sub-groups	.)			
1001 Application Name Application Name Bab - e-Bill Services Forms Library Report Portal Evidence of Insurability Report Last 4 SSN (MLS-02_xe) MCR-02A_e; Life Paid Claim Detail by Incurred Date				5,						
Applications Application Name Data e-Bill Services - Forms Library - Report Portal - Evidence of Insurability Report Last 4 SSN (MLS-02_xe) MCR-02A_e: Life Paid Claim Detail by Incurred Date			Id			Name				
Application Name Data			1001							
Berbill Services Forms Library Report Portal Report Name Evidence of Insurability Report Last 4 SSN (MLS-02_xs) MCR-02A_e; Life Paid Claim Detail by Incurred Date					Applications				_	
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	Ар	plication Name			Data					
Report Portal Report Name Evidence of Insurability Report Last 4 SSN (MLS-02_xe) MCR-02A_e; Life Paid Claim Detail by Incurred Date										
Report Name Evidence of Insurability Report Last 4 SSN (MLS-02_xe) MCR-02A_e; Life Paid Claim Detail by Incurred Date										
Evidence of Insurability Report Last 4 SSN (MLS-02_xe) MCR-02A_e; Life Paid Claim Detail by Incurred Date		Report Portal			Bonnet	Namo				
MCR-02A_e; Life Paid Claim Detail by Incurred Date				Evider						
MCR-14 e: Life Insurance Waiver of Premium Report										
				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
- 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 typ	 e automatically has access to all active sub-groups)
Active Sub Groups	All active sub group(s).	
Select All		
	Id	Name
	1001	
		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 <u>not</u> 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.

	2. User Access
User Type Active Sub Groups	: GROUP (Hint: GROUP user type automatically has access to all active sub-groups) All active sub group(s).
Select All	Id Name
	1001
	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

<u>User Access Section – Active Subgroups</u>

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.

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 Active Sub Groups	: GROUP (Hint: GROUP user ty All active sub group(s)	pe automatically has access to all active sub-groups) I.	
Select All	Id	Name	
	1001		
		Applications	
Application Name e-Bill Services Forms Library Report Portal		Data	
		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. <u>Not</u> applicable to List Billed subgroups.
Subgroup Enrollment	Only enrollment functionality for the List Billed subgroup(s) specified. <u>Not</u> applicable to List Billed subgroups.

- 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:



- 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.

User ID	User Type	First Name	Last Name	E-Mail	E-Bill Services	Forms Library	Report Portal	Active/Terminated
	SUBGROUP BILLING				7			Active
	SUBGROUP BILLING	4			V			Terminated (03/30/2017)
	GROUP				\checkmark			Active
	GROUP			h	1	\checkmark	~	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

	1. Identity
Effective Date : User ID : First Name : Last Name : Email Address :	03/03/2016
	2. User Access
User Type :	SUBGROUP BILLIN(V
Active Sub Groups	No active sub-groups assigned to this user.
	Id Name
	1001
	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	

- 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 <u>remove</u> access to the previously selected reports.
- 10. Click on an unchecked report to <u>add</u> 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'spassword Terminate an existing user
BEFORE YOU BEG	GIN Login to the <i>eAdministration</i> system and open the USER LISTING screen.

User ID	User Type	First Name	Last Name	E-Mail	E-Bill Services	Forms Library	Report Portal	Active/Terminated
-	SUBGROUP BILLING				>			Active
	SUBGROUP BILLING	1			1			Terminated (03/30/2017)
	GROUP				1			Active
	GROUP			h	1	~	~	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.

	1. Identity
User ID	: 03/03/2016 :
	2. User Access
User Type	SUBGROUP BILLINC V
Active Sub Groups	No active sub-groups assigned to this user.
	Id Name
	1001
	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 Clair	m
Detail by Incurred Date	
MCR-14_e; Life Insurance	
Waiver of Premium Repor	t
MCR-15_e; Life Pended	
Claim	
	Close

- 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:



- 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

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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	: 11/03/2018
(mm/dd/yyyy)	
User ID	
First Name	
Last Name	
Email Address	
	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.

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



- 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.