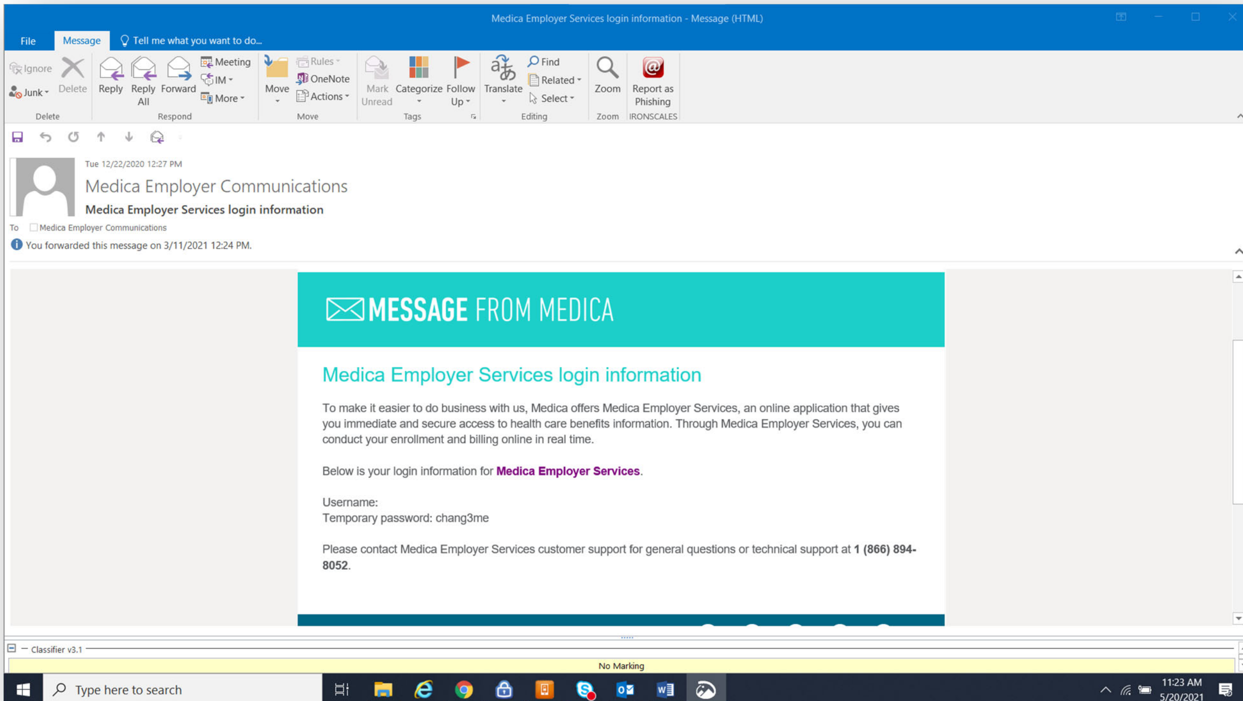
Medica Employer Services User Guide

October 2021

Contents

Login

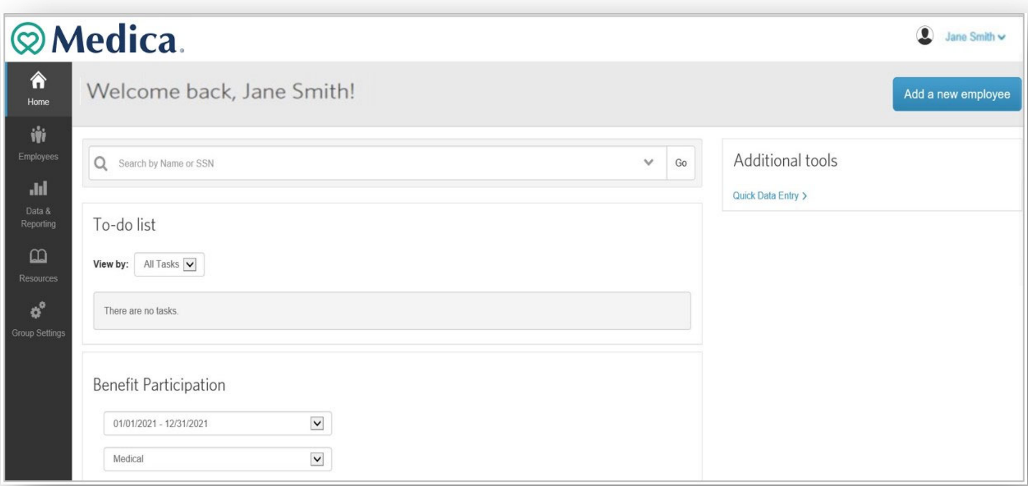
As soon as the group has been set up, we'll send you an email with your user name and temporary password. You can then set up your account and your password



https://secure-enroll.com/go/medicahealth

Home Page

After logging into your account, you'll see the home page.



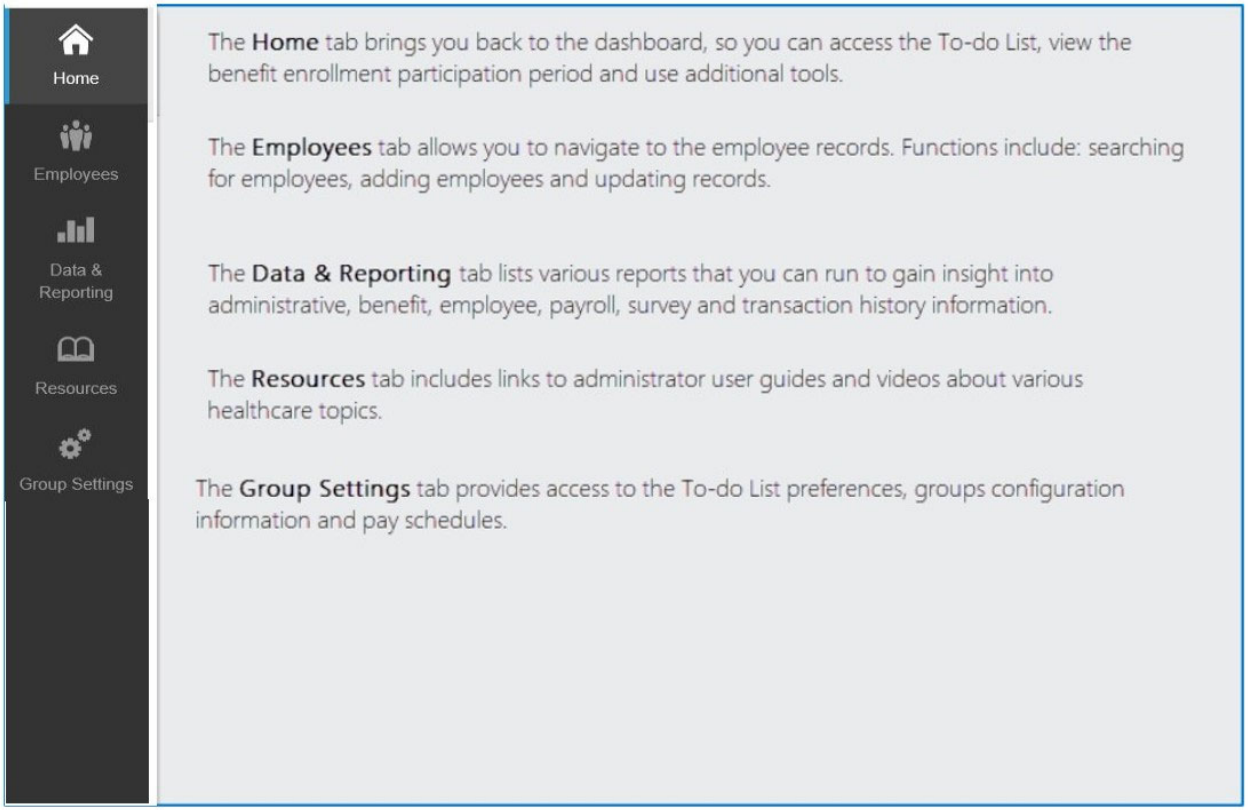
To-do List

When an employee's record has missing information or important documentation, a task will appear in your **To-do list**. Located on the home page, this tool allows you to quickly and easily complete required tasks provided you have permission to do so.

It's important to stay on top of your **To-do list** tasks.

Navigation

From the home page, you can easily access key features and tools by selecting an option from the navigation bar on the left side of the page. Below is an overview of each tab's key functionality.



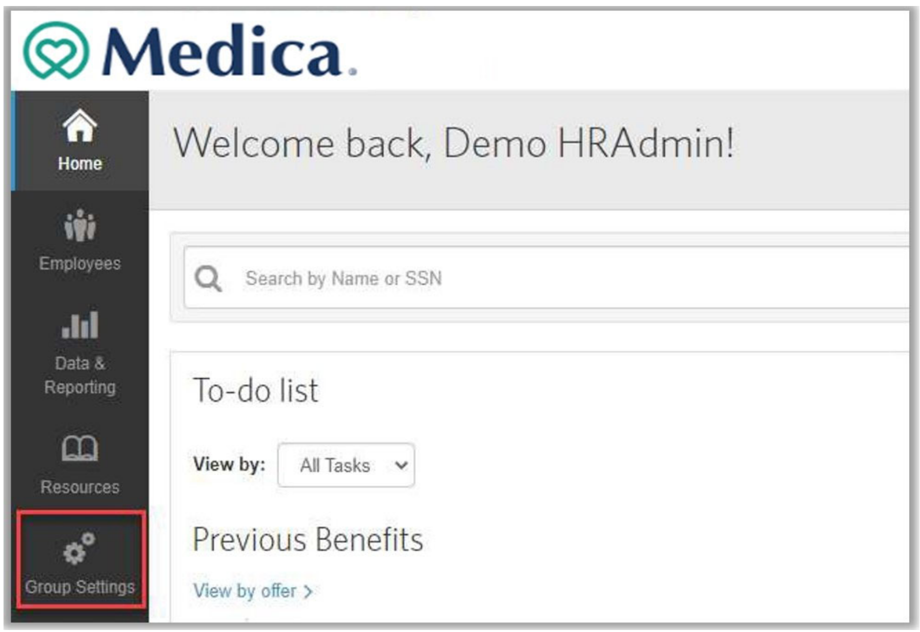
Creating Additional Users in Enrollment

The main user for the group will be a designated Client Super User. The Client Super User has the ability to add additional accounts that will be able to log in, view, and/or manage enrollments.

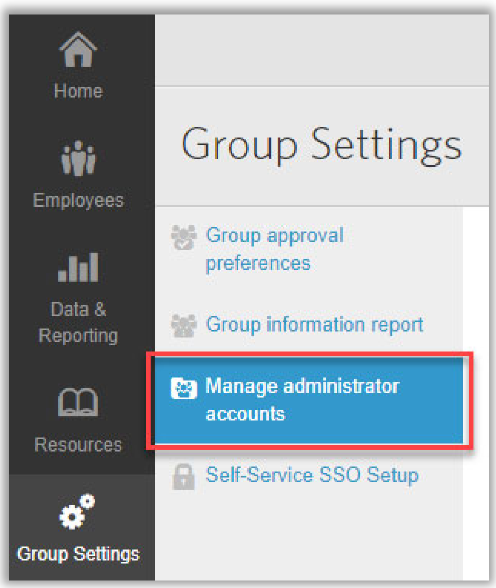
- A Client Restricted user can manage enrollments
- A Client View Only user can view reports and enrollment information

Adding and Managing Administrator Accounts

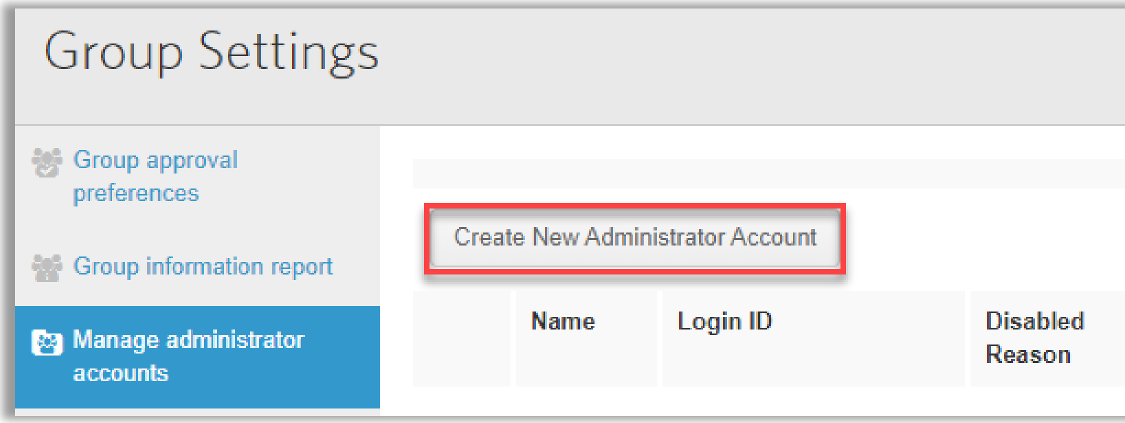
1. Access **Group Settings** from the home page



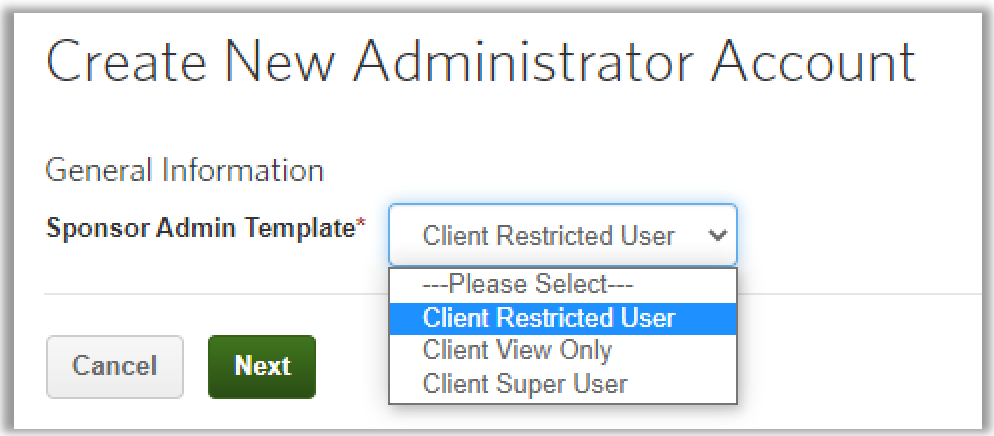
2. Once in Group Settings select **Manage administrator** accounts.



3. Select **Create New Administrator Account**



4. Select Role from the **Sponsor Admin Template** drop down menu



Reminder:

- A Client Restricted user can manage enrollments
- A Client View Only user can view reports and enrollment information
- A Client Super User can manage enrollments and agent/group users

5. Once you have selected the **Admin Template**, complete the account details on the **Create New Administrator Account** page.

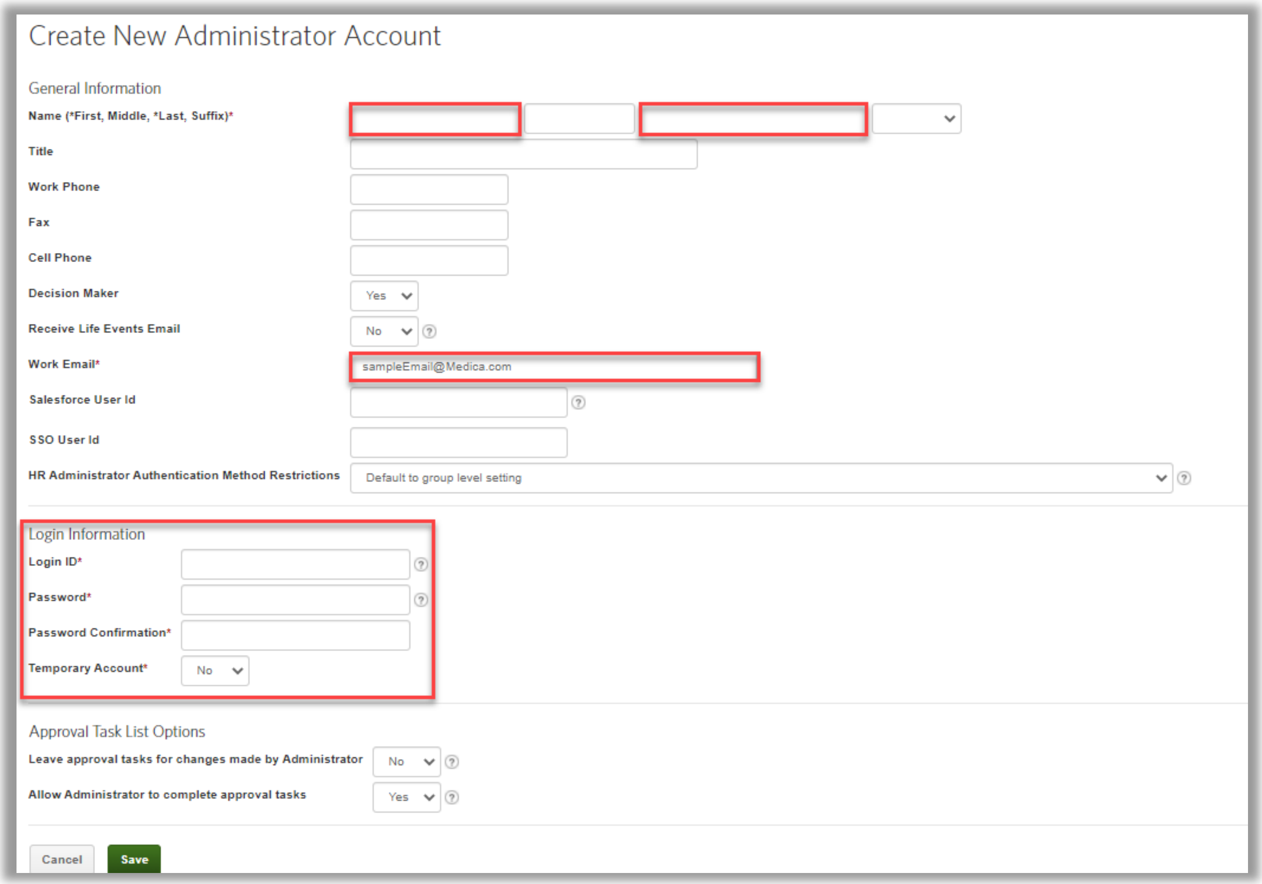
   The following information is required in order to save and create the account:

   — General Information
     - First Name
     - Last Name
     - Work Email

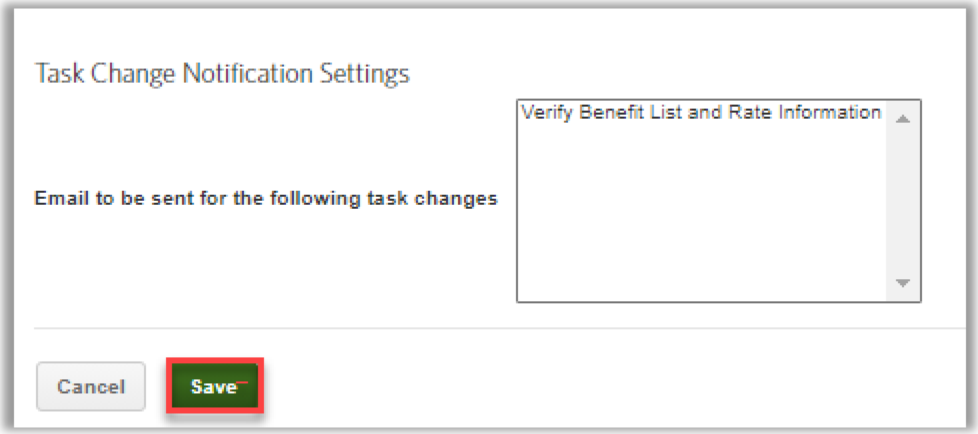
   — Login Information
     - Login ID (typically their email) (Must contain 8-24 characters, at least one letter, optional special characters: dashes, decimals, underscores, the @ symbol. It may not contain any spaces, special characters other than those referenced or the password).
     - Password
     - Password Confirmation

     Temporary Account (Select No unless account should have a limited time to access the platform)

   — Approval Task List Options
     - No changes should be needed in this section



6. The next screen is **Task Change Notification Settings.** You don't need to enter anything in this screen. Click **Save to** continue.



Creating Additional Users in Billing

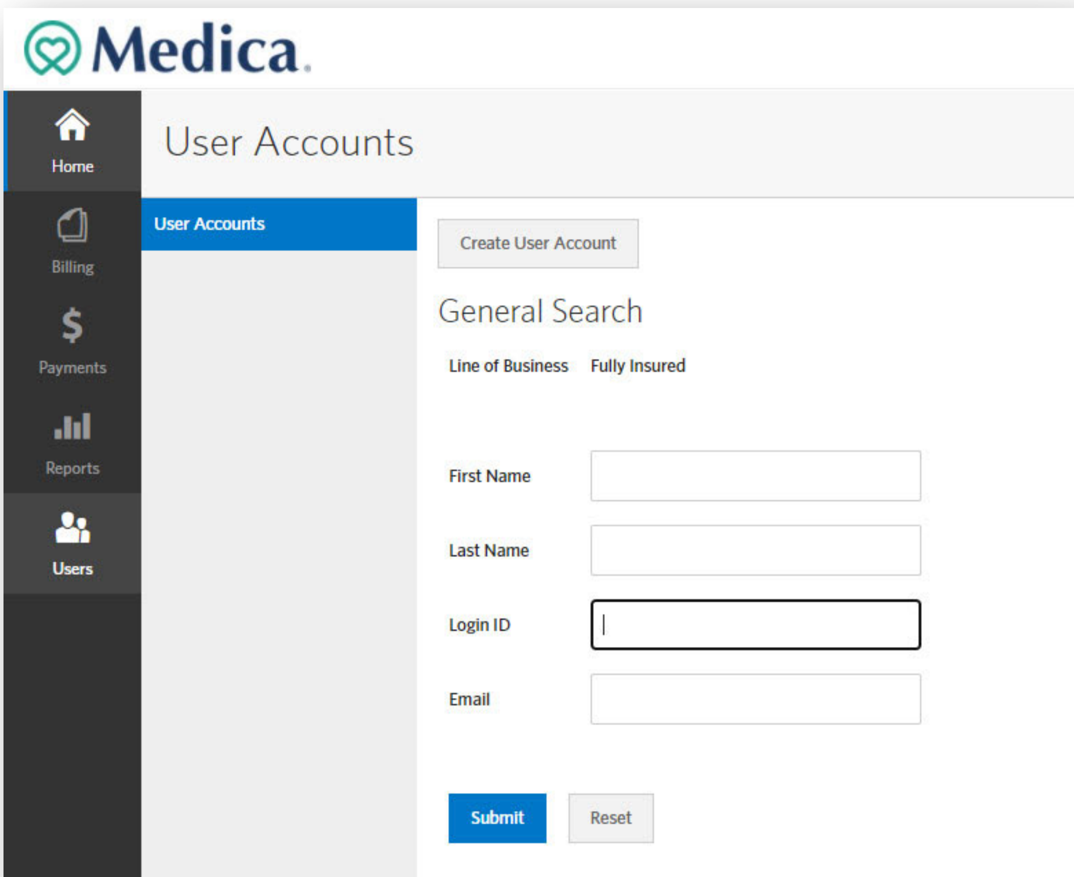
Client Super Users can add or manage user accounts on the **Users** tab to add access to the **Billing** section of the platform.

You can only add and view users with the same or lower permission level as you.

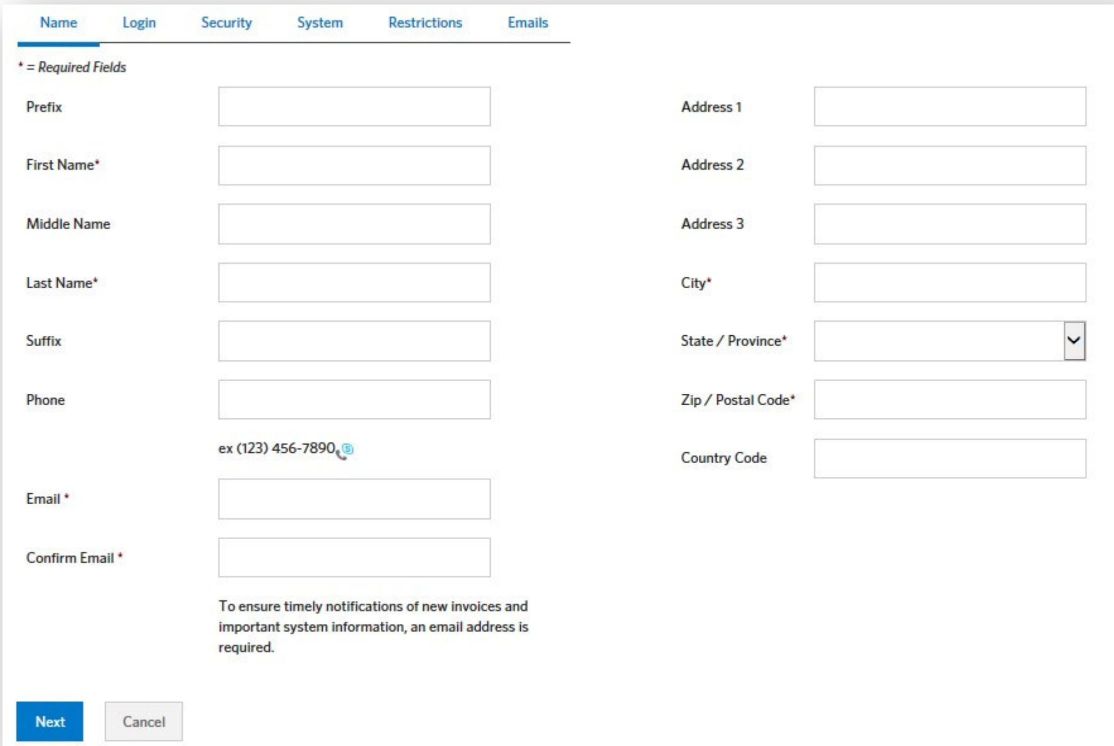
Creating a User Account

To create a new user account:

1. Click **Users** in the main navigation bar. The **User Accounts** tab displays.
2. Click the Create User Account button.

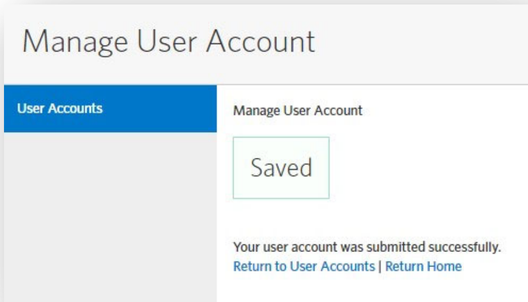


3. Enter the requested information on each of the tabs for the user account: **Name, Login, Security, System, Restrictions** and **Emails.** Required fields are indicated with an asterisk (*). Click **Next** after completing each tab.



- **Name tab:** Enter the user's demographics on this tab. If the user should receive emails, as configured on the *Emails* tab, be sure to enter a valid email address for the user.
- **Login tab:** Click the **help icon** for *Username* and *Password* to view the username and password requirements. Ensure the **Enable Login** checkbox is selected to allow the user to log into the system.
- **Security tab:** Select the security profile(s) to be assigned to the user. This determines the features and functionality the user can access.
- **System tab:** If your group has access to more than one label system, select to determine which label system(s) the user should be able to access.
- **Restrictions tab:** If your group has more than one classification for invoices (for example, invoices are generated per location), select which invoice group(s) the user should be able to access.
- **Email tab:** Select what events should trigger an email notification to be sent to the email address entered for the user. For example, you may choose to receive an email when a new invoice is available.

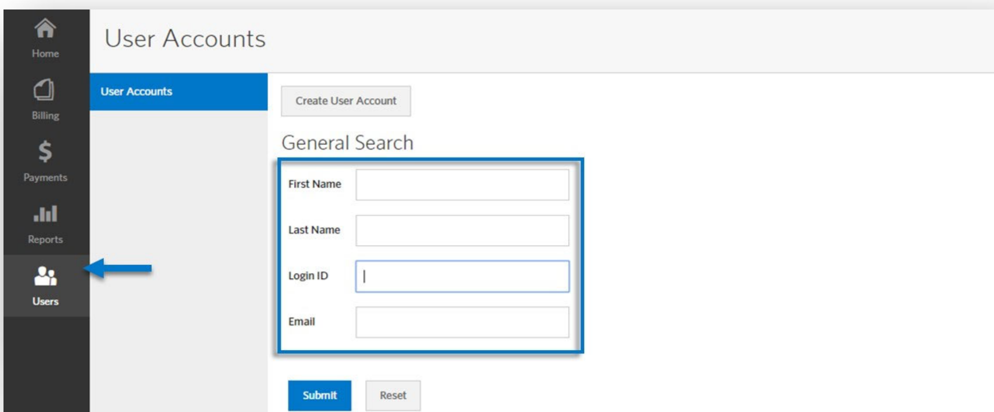
4. Click **Save** once all tabs are complete. You'll receive a confirmation message.



Editing a User Account

To update a user's account information, complete the following steps.

1. Click **Users** in the main navigation bar. The **User Accounts** tab displays.
2. Search for the user account using any of the search fields. Click **Submit**. To search for all users, click **Submit** without entering any criteria in the search fields.



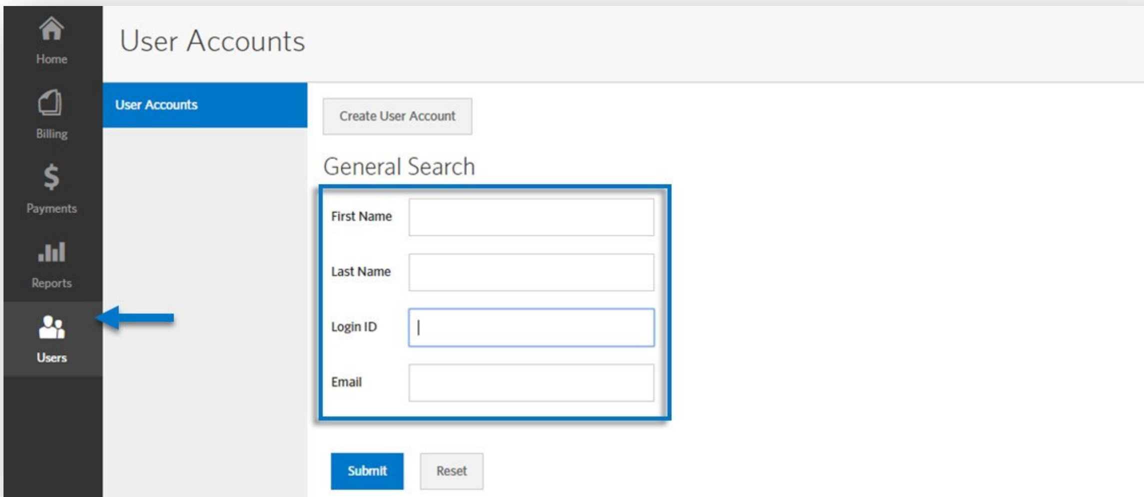
3. Click **Options**, then select **Edit User Account** for the account to be updated on the Search Results page.
4. Navigate to any of the tabs you need to update.
5. Click **Save** after making your changes.

Cloning a User Account

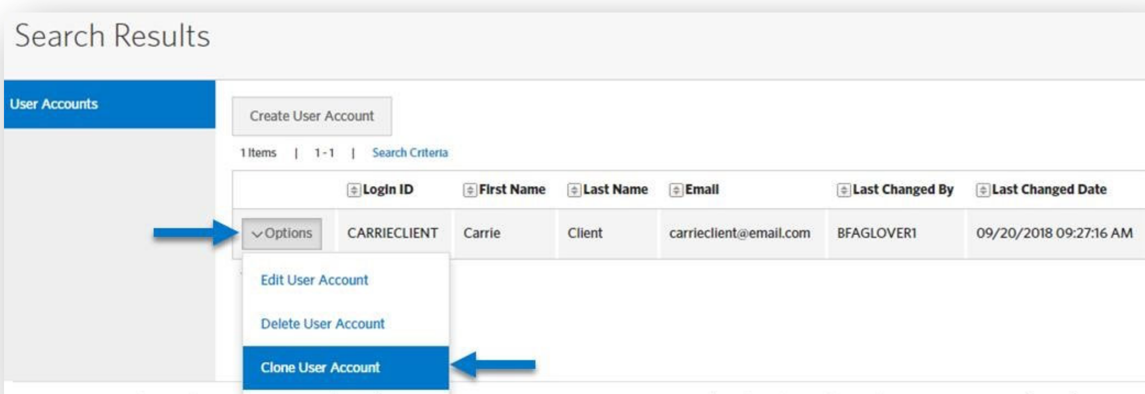
You can copy information from one user account to another to quickly add new users to the system. This is particularly useful if you need to create several users with the same permission sets.

Complete the following steps to clone a user account.

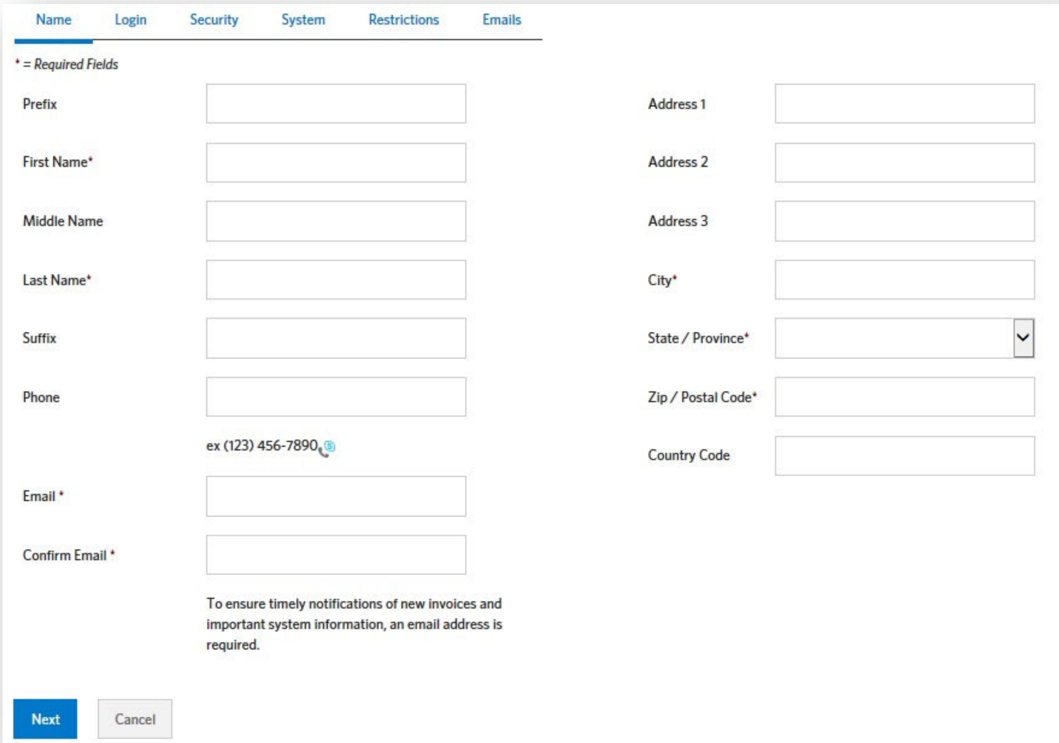
1. Click **Users** in the main navigation bar. The **User Accounts** tab displays.
2. Search for the user account using any of the search fields. Click **Submit**. To search for all users, click **Submit** without entering any criteria in the search fields. Note that you should clear the auto-populated date and reset to the date you are completing the task. The system will not allow a previous date.



3. Click **Options**, then select **Clone User Account** on the **Search Results** page for the account to be cloned.



4. Enter the unique demographic information for the new user on the **Name** tab, then click **Next**. Required fields are indicated by an asterisk.



5. Enter the **Username** and **Password** for the new user on the **Login** tab.

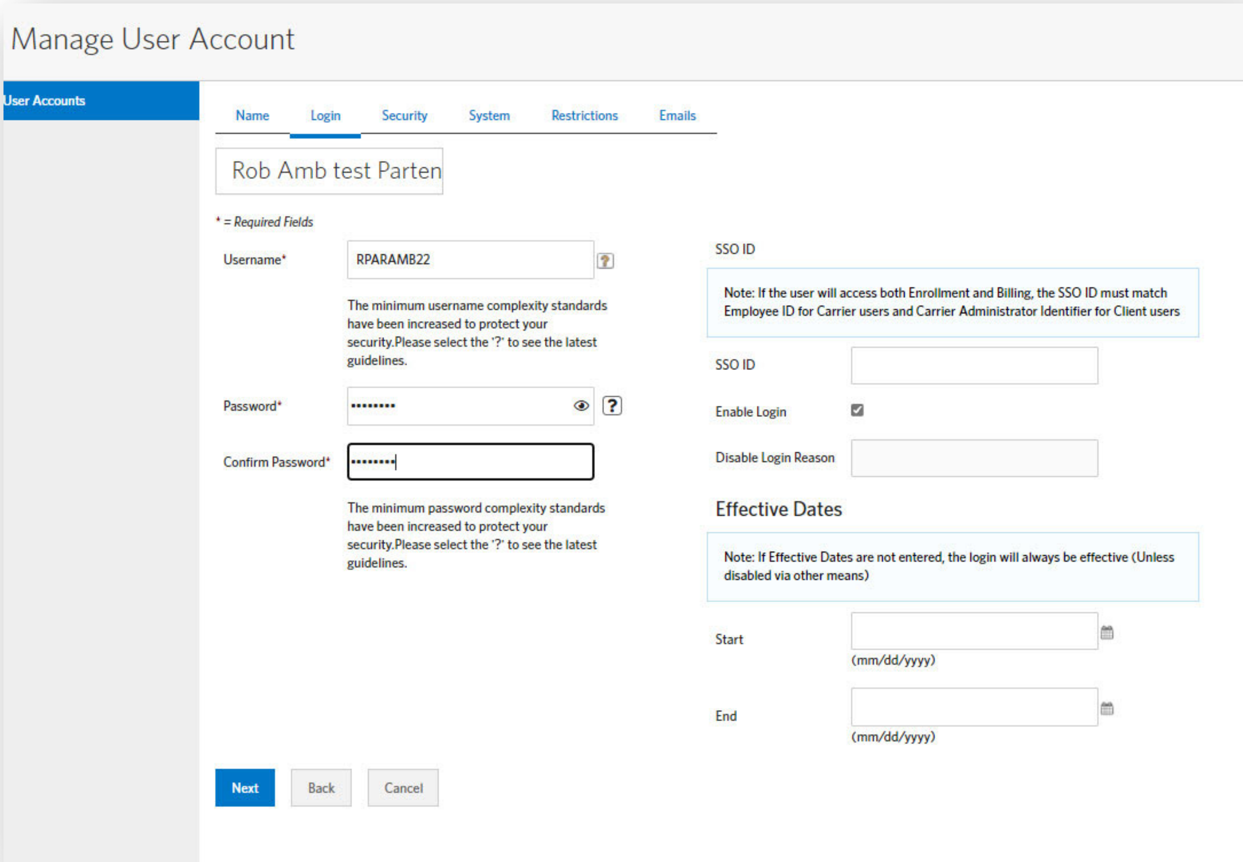
   Click the help icon next to the **Username** and **Password** fields to view the requirements for each.

6. Update any additional information that should be updated on the remaining tabs. (Information is copied from the previous user.)
7. Click **Save**. You will receive a confirmation message.

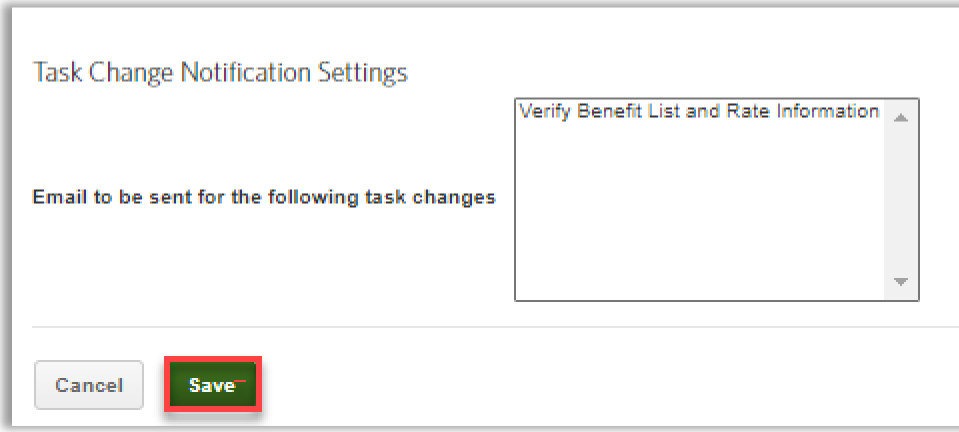
Navigation between Enrollment and Billing

When setting up users that have access to both enrollment and billing, we recommended setting up a Single Sign On (SSO) ID. This allows a user to transition from enrollment to billing with one login.

The Carrier Administrator ID (usually the user's email address) entered in enrollment should be entered in the SSO ID field in billing to link the two enrollment and billing account together.



1. **Task Change Notification Settings** – Nothing is needed here, just click **Save** to continue.



2. If the User should only have access to a particular set of members within a group, there is the ability to breakout access by SUB ACCOUNT or DIVISION.
   — If the User should have access to ALL members then you just SAVE to continue

3. Upon saving the **Enablements** page the User account should now be visible in the list of Users setup for the group

Updating Your Account Settings

Update your user account settings to change your email, password and security questions. Security questions may be used for account validation in the future if you lose your username or password.

Follow the steps below to update your user account.

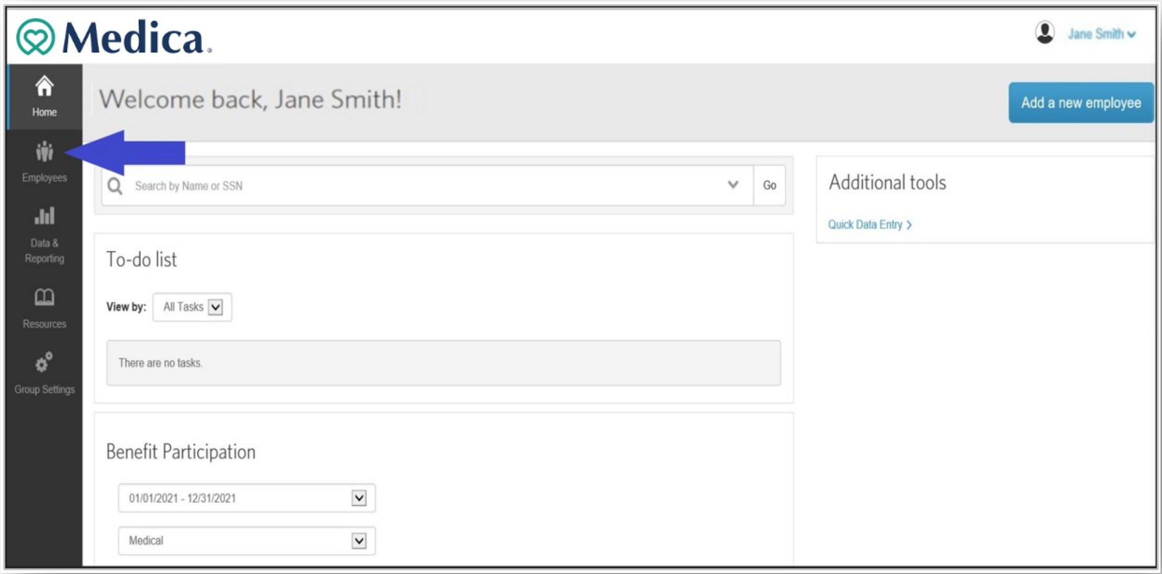
4. Click the **User Profile** menu in the upper right corner, and then select **My Account**.
   The **My Account Settings** page displays.
5. Update your preferred email address, password and/or security questions as desired. Click the **Help** icon next to the **New Password** field to view password requirements.
   Be sure to enter a valid email address. This will allow you to receive system notifications, such as notification that invoices are ready for review.
6. Click **Save**.

Enrollment

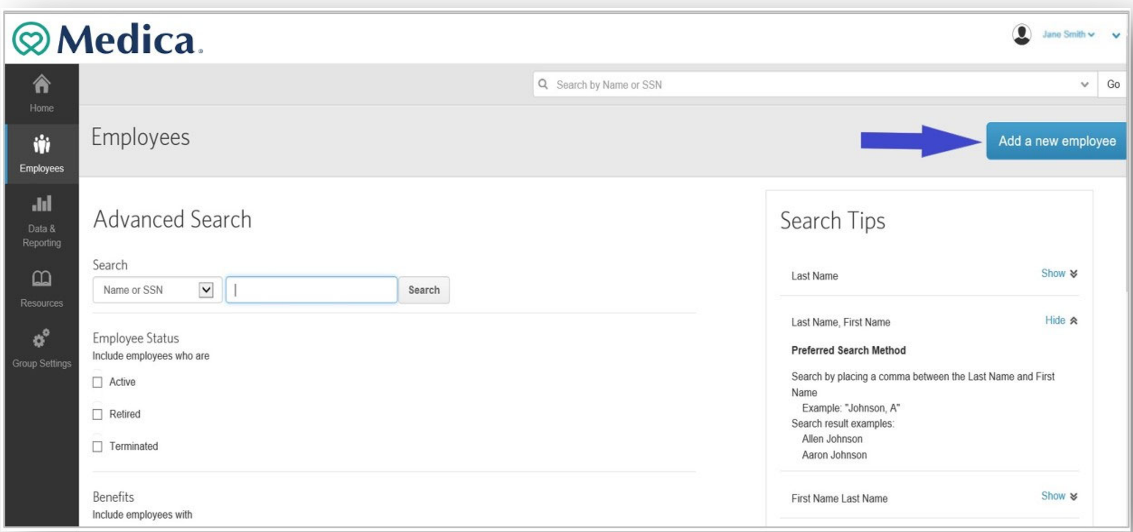
Adding a New Employee

Follow the steps below to add a new employee.

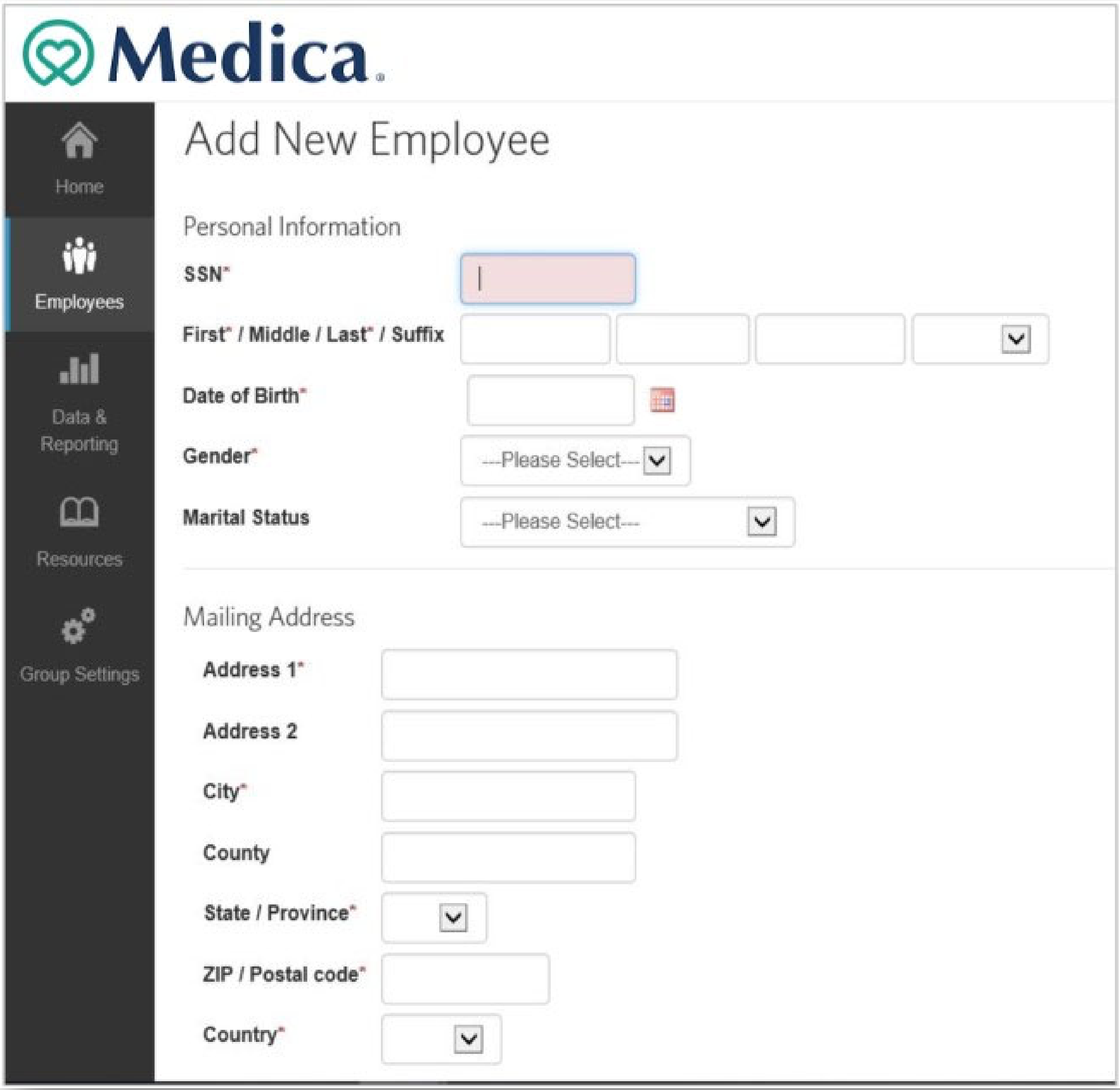
1. Select the **Employees** tab from the navigation bar.



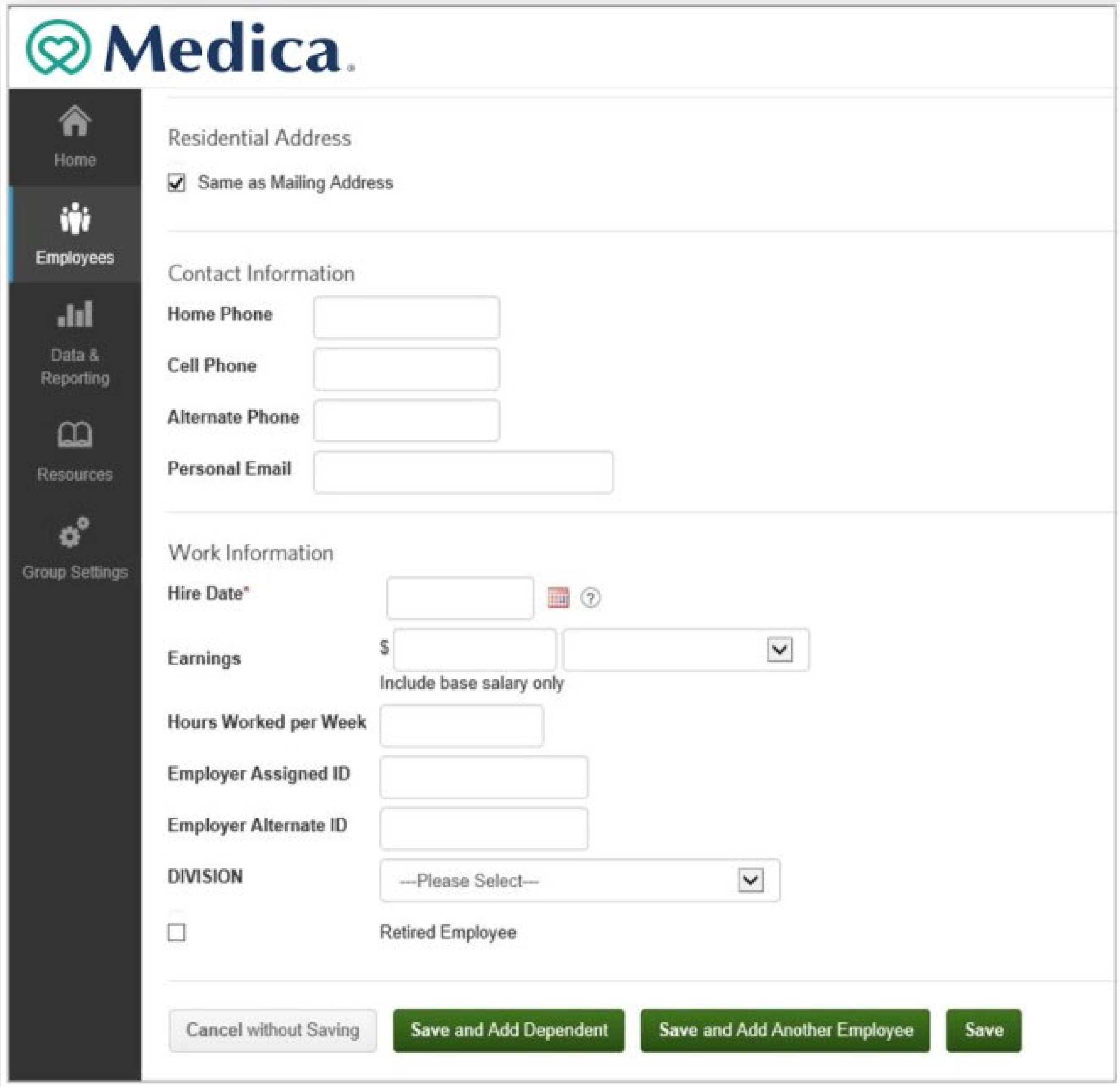
2. Click **Add a new employee**.



3. Complete the **Personal Information** section by entering the employee data in the required fields (identified with an asterisk).



4. Complete the **Work Information** section by entering the employee data in the required fields (identified with an asterisk).



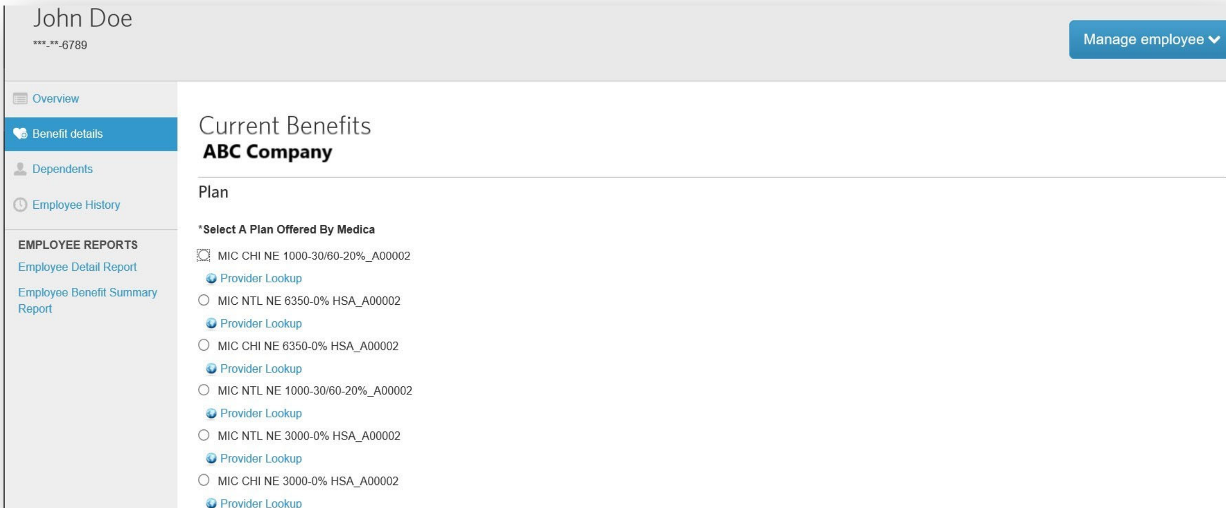
5. Click the appropriate **Save** button at the bottom of the page.

Enrolling an Employee in Benefits

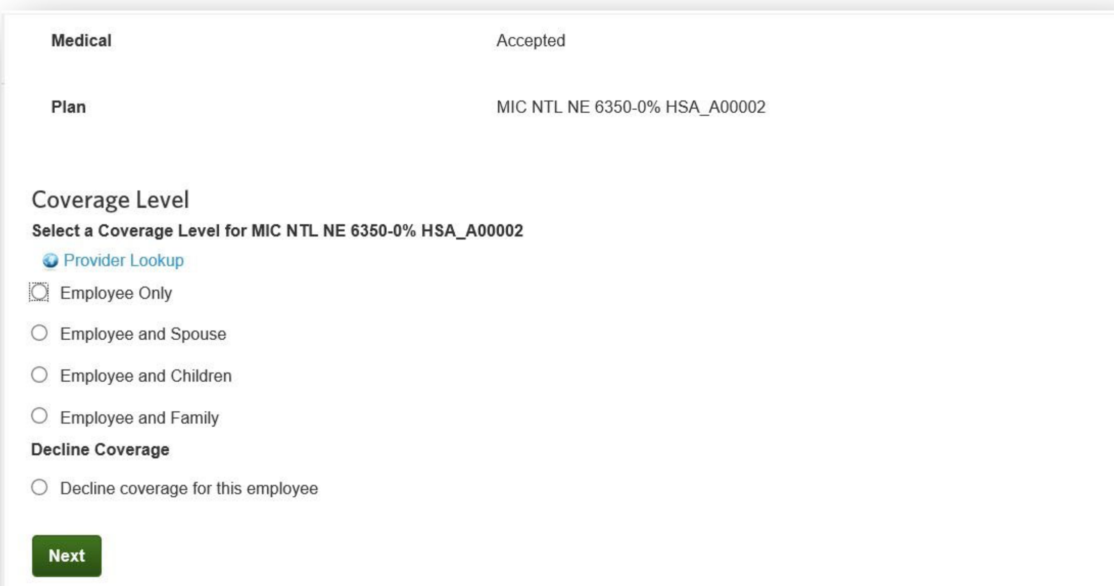
Electing benefits for an employee consists of a series of steps. The types of information that you will enter may vary depending on the employee, the type of benefit, and settings established for your group.

Follow the steps below to enroll an employee in medical coverage.

1. On the Current Benefits page, select the medical plan in which you are enrolling the employee, and click **Next** at the bottom of the page.

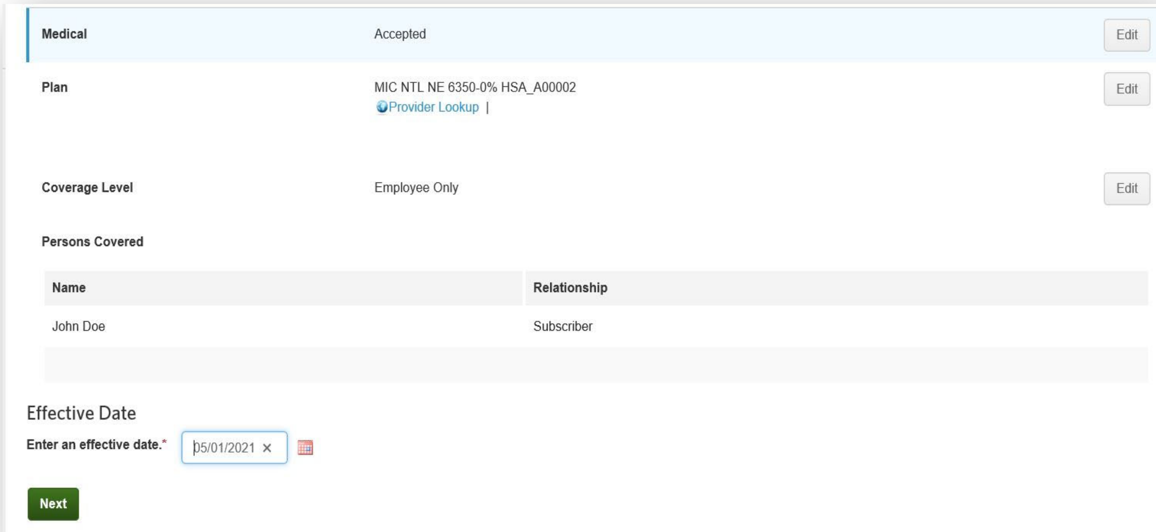


2. Select the **Coverage Level** for the plan, then click **Next**.



3. Verify or update the date in the **Effective Date** field and then click **Next**. The pre-populated date will be the first of the month following date of hire.

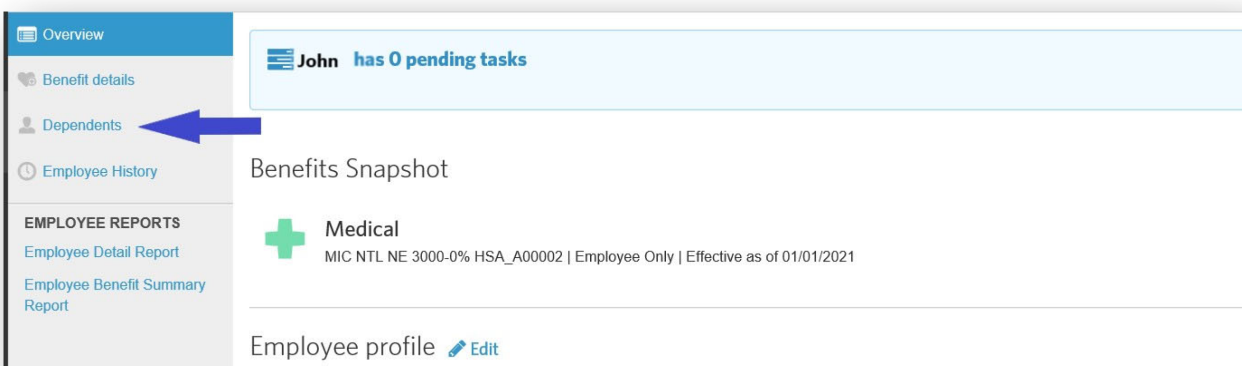
   Important Note: Adjust the effective date to align with your organization's eligibility rules.



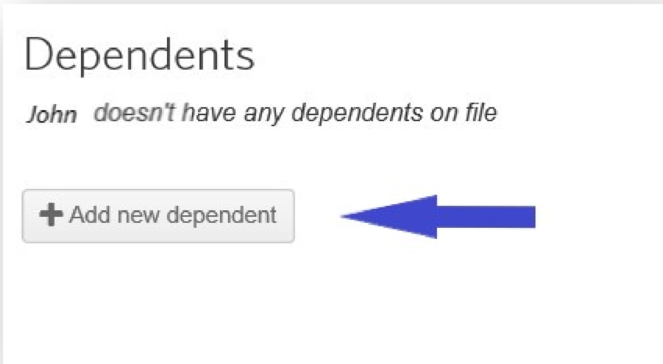
Adding a Dependent

To add dependents use the employee's **Dependents** tab.

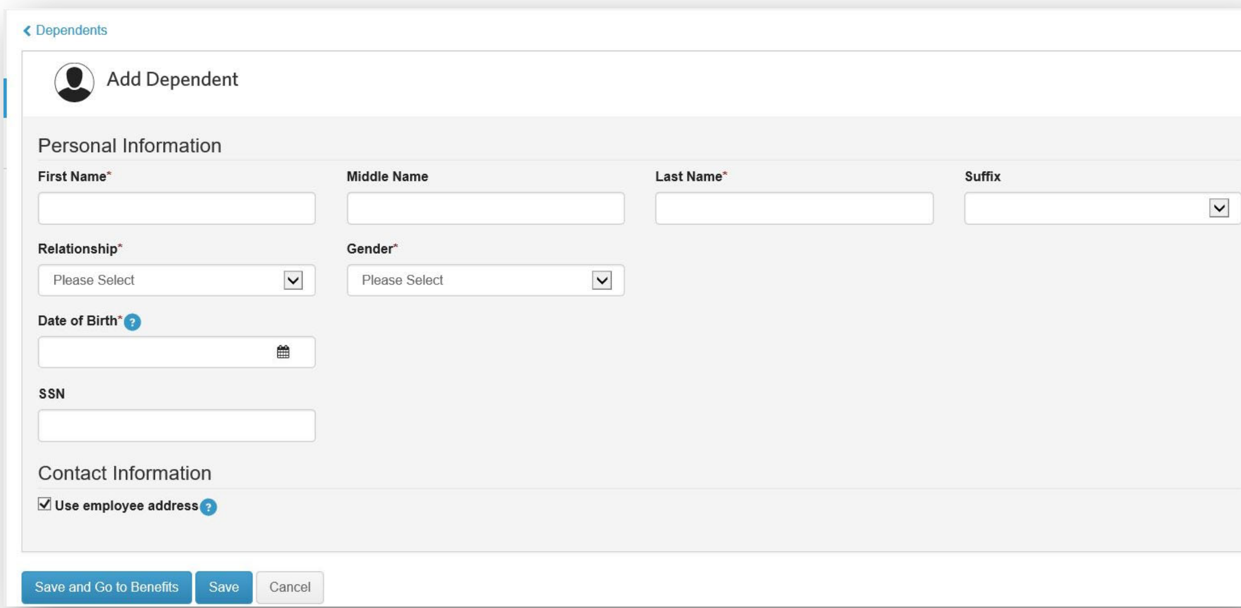
Follow the steps below to add a new dependent to an employee record.



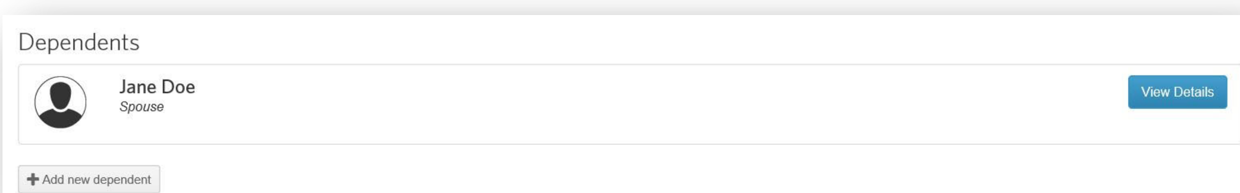
1. Click **Add new dependent**.
   If the employee has at least one dependent on file, **Add another dependent** button will display.



2. Enter the dependent's demographic information. Required fields are indicated with an asterisk.

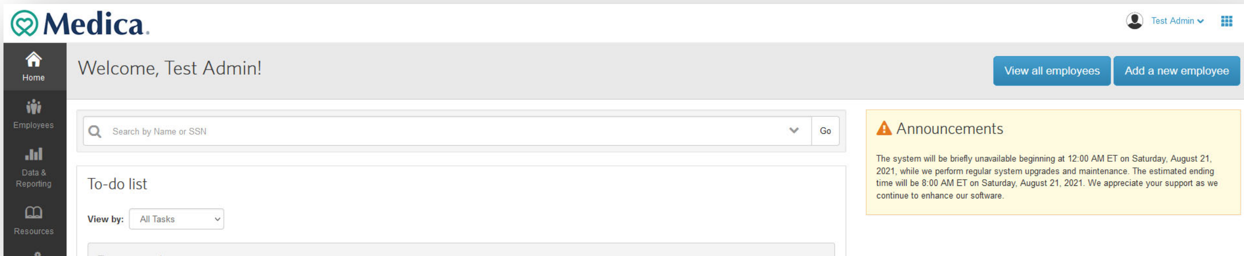


3. Click **Save** at the bottom of the page. The new dependent appears within the Dependents section.

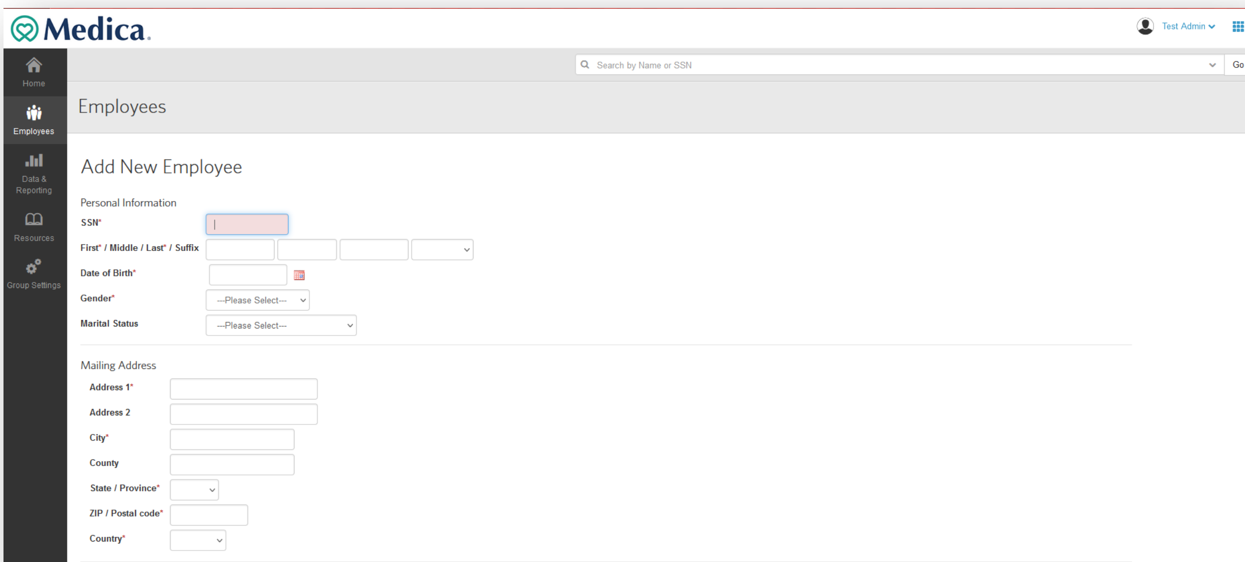


How to add a new employee after set up for the next plan year.

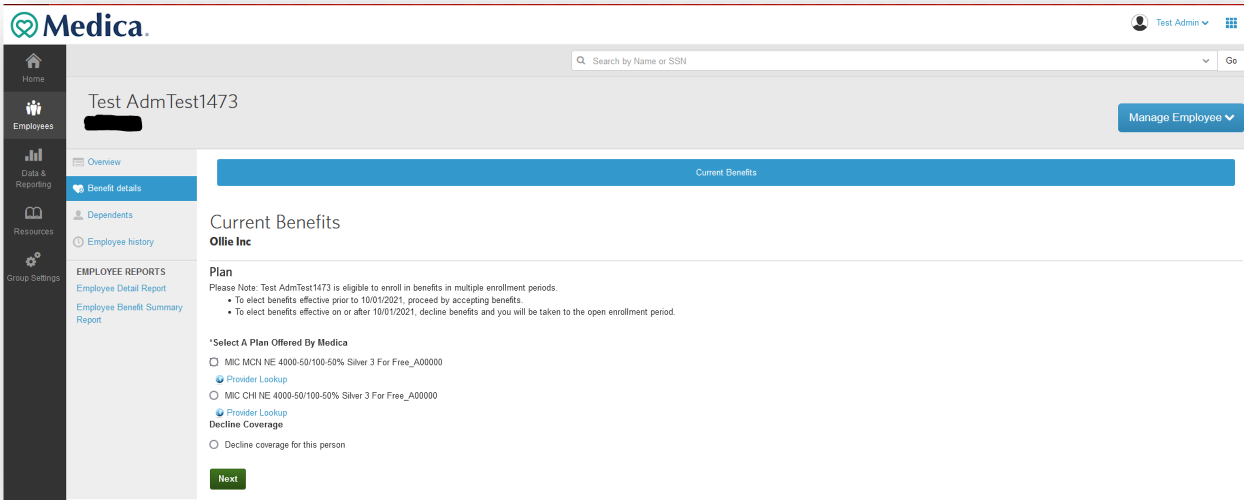
Example: You are enrolling an employee for a 10/1 employee coverage effective date, for a group renewing in January.



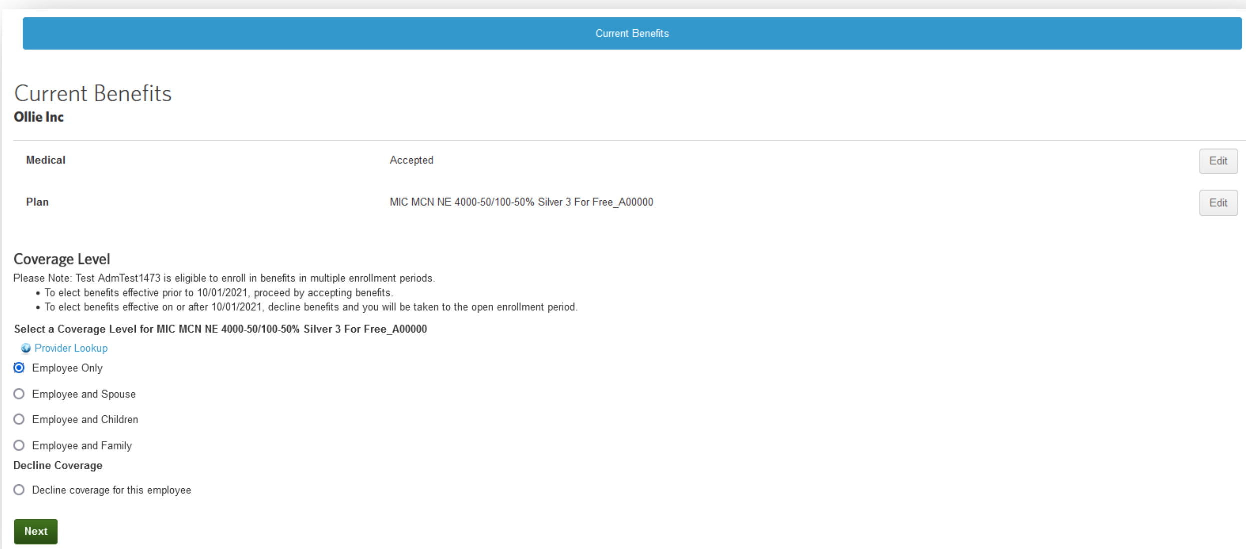
1. Follow the process to **Add New Employee**:



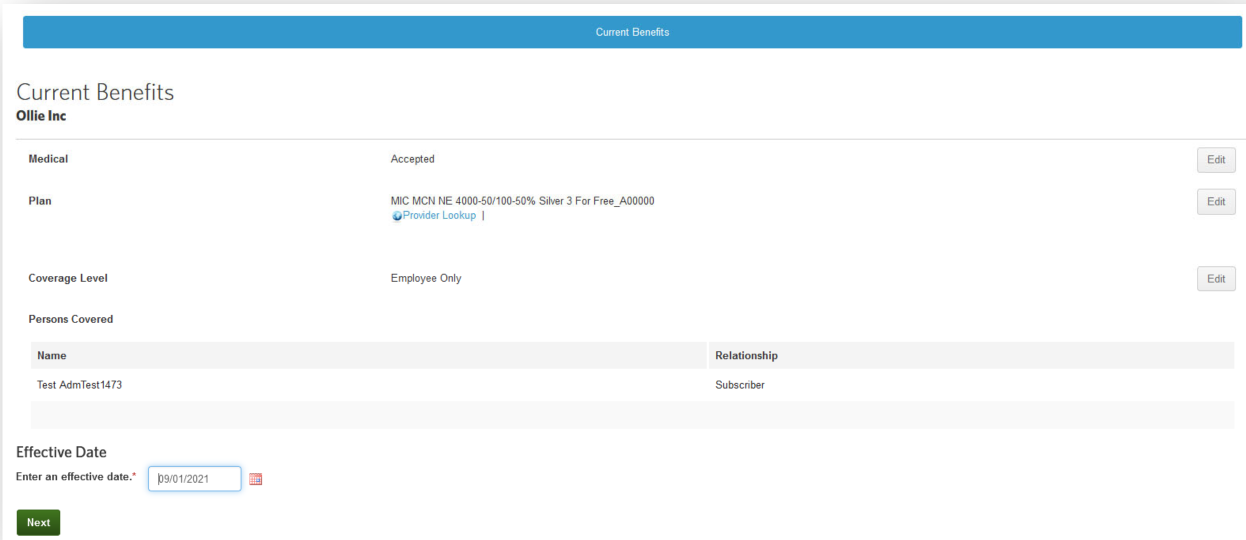
2. In the example of a 10/1 employee coverage effective date on a January renewal group you will automatically be taken to the below screen to select Current Benefits for the employee.



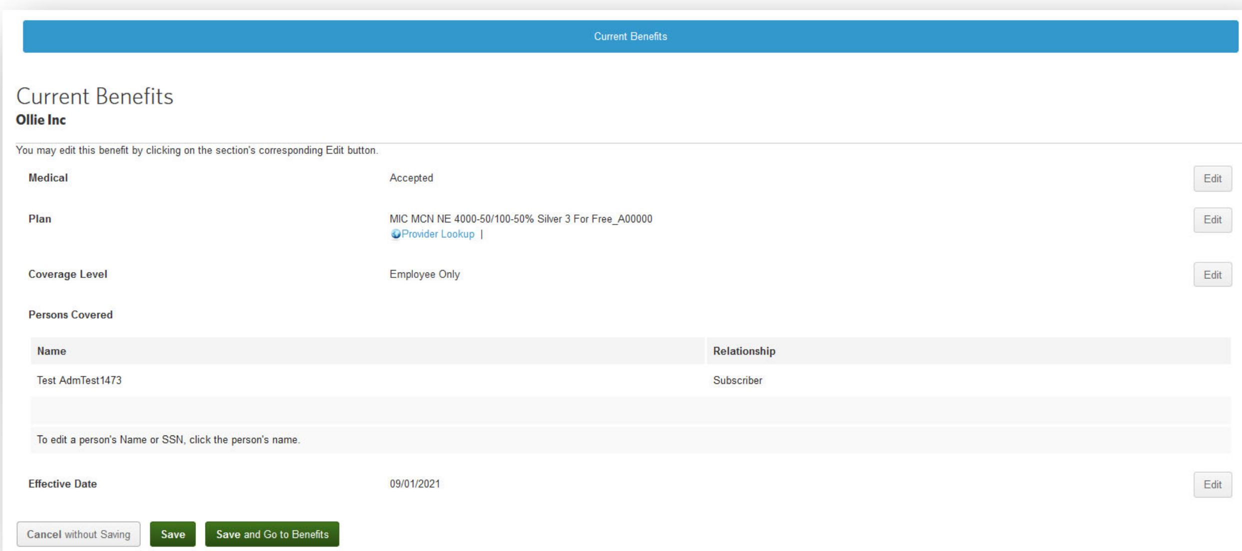
3. Select the **Coverage Level**, then click **Next**.



4. Enter the **Effective Date,** then click **Next**.



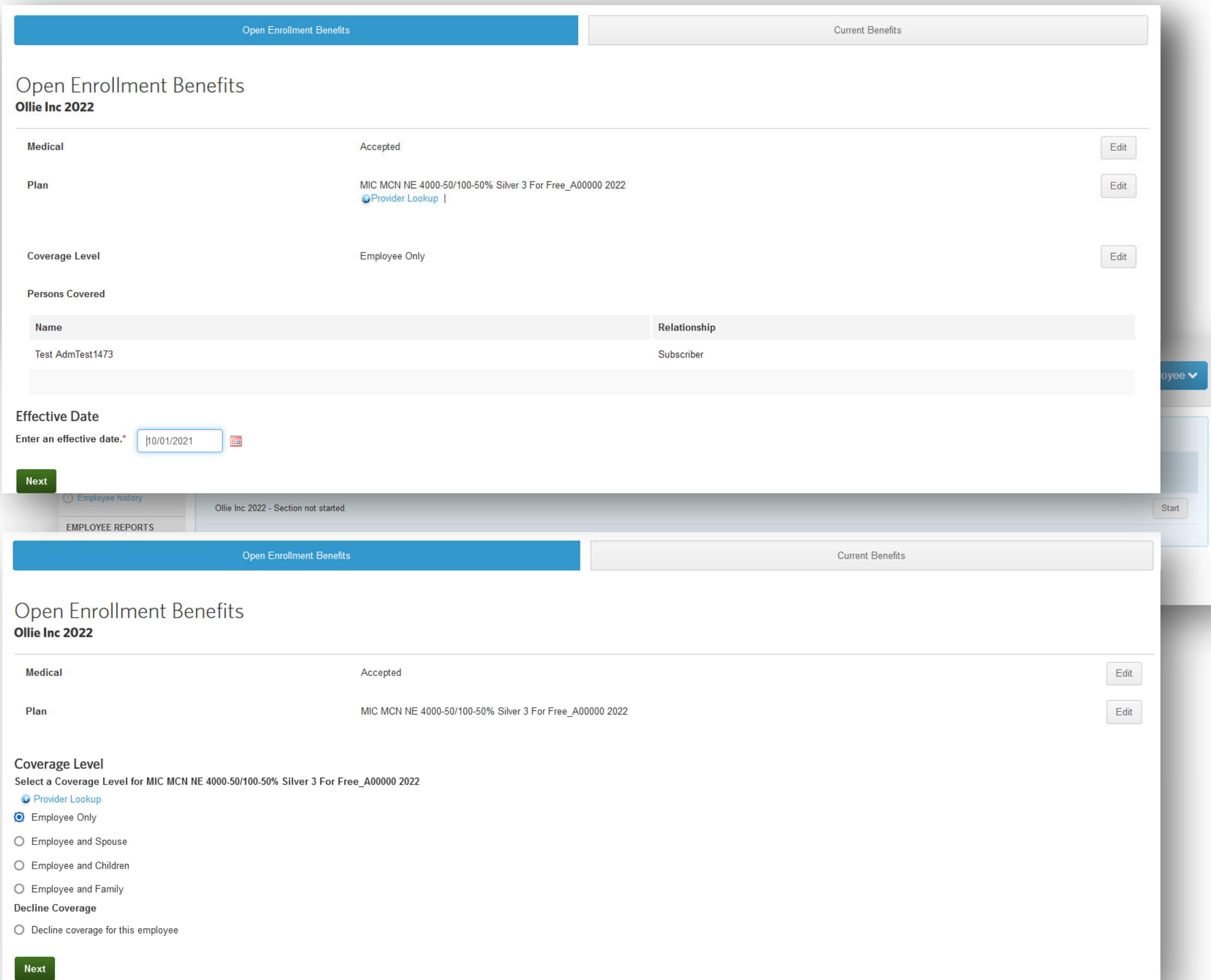
5. You will then see the **Current Benefits** tab to review. Review, then click **Save and Go to Benefits**.

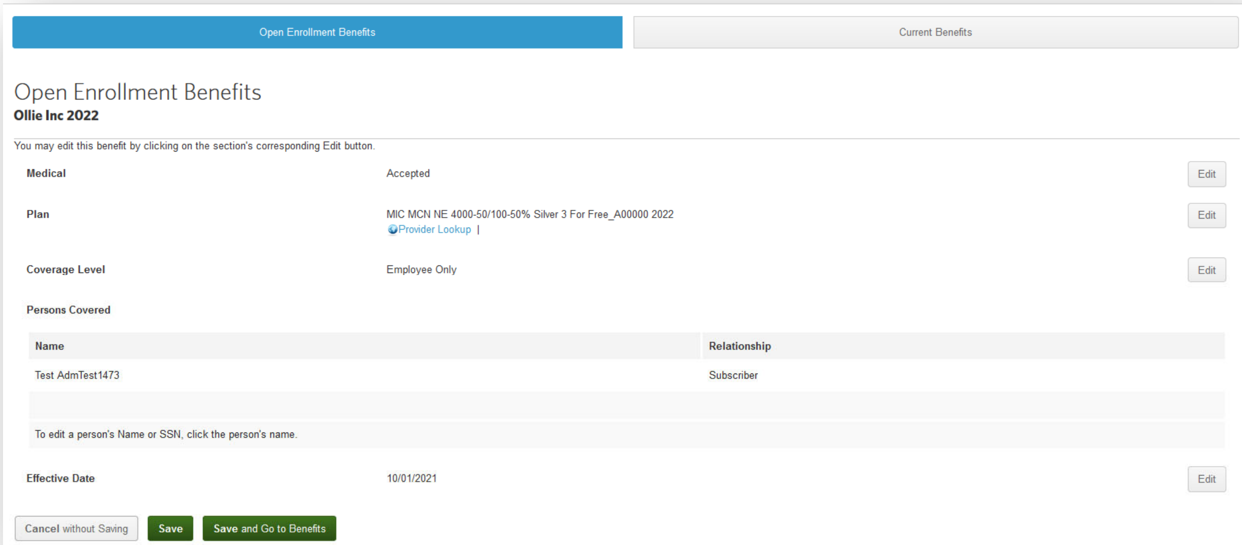


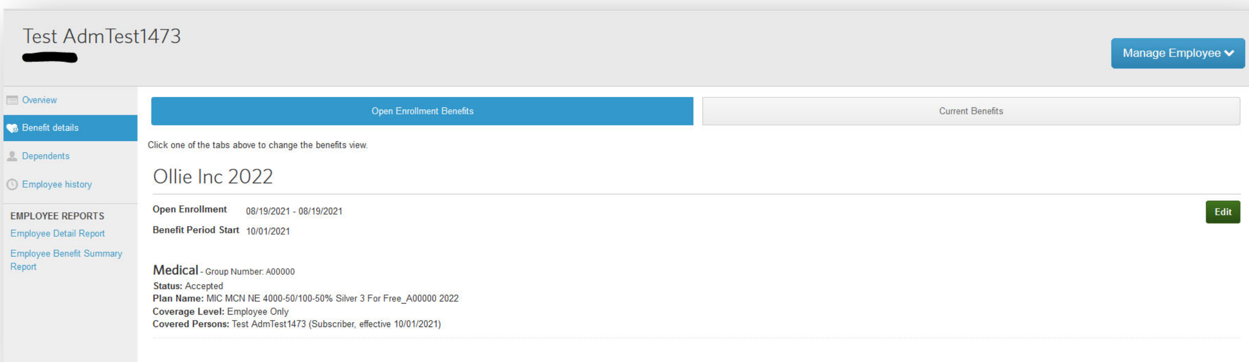
6. The Admin can click on **Open Enrollment Benefits** tab to elect coverage for the next year.

7. Or, the Admin can click on **Overview**. This will create a pending task to complete enrollment for the following plan year.

The Admin could start next year's election from the **pending task list** or from the **Open Enrollment Benefits** tab. The rest of the process will be similar to selecting coverage for Current Benefits.





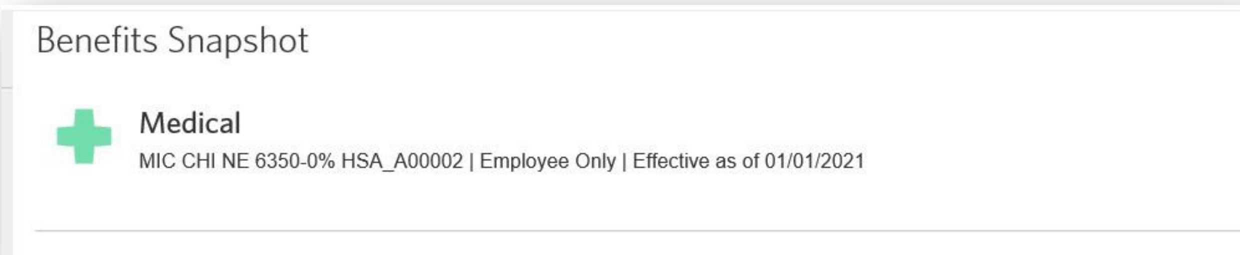


And you're done!

An employee will not be eligible to be added after the current participation period, based on the default eligibility rule, which is the first day of the following month. In that case, you will be taken to the **Open Enrollment Benefits** tab to elect coverage for the next plan year for the employee, rather than needing to elect current benefits.

Viewing Benefit Details and Eligibility

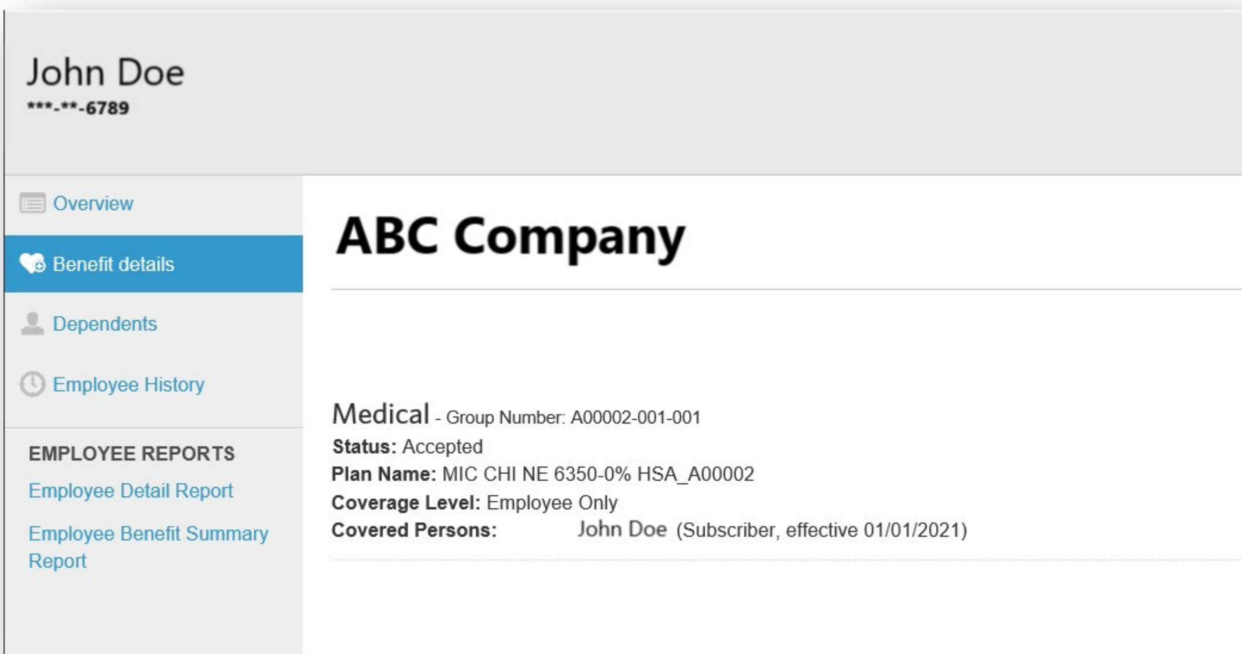
The **Benefits Snapshot** on the employee record **Overview** tab provides basic benefit information.



Administrators are able to view and make changes to employees' benefits at any time. To do so, click the Benefit details tab within the employee record.

On the **Benefit Details** page, you can see:

- All benefits available to the employee, including the benefits the employee has accepted or refused.
- Benefits that need to be started

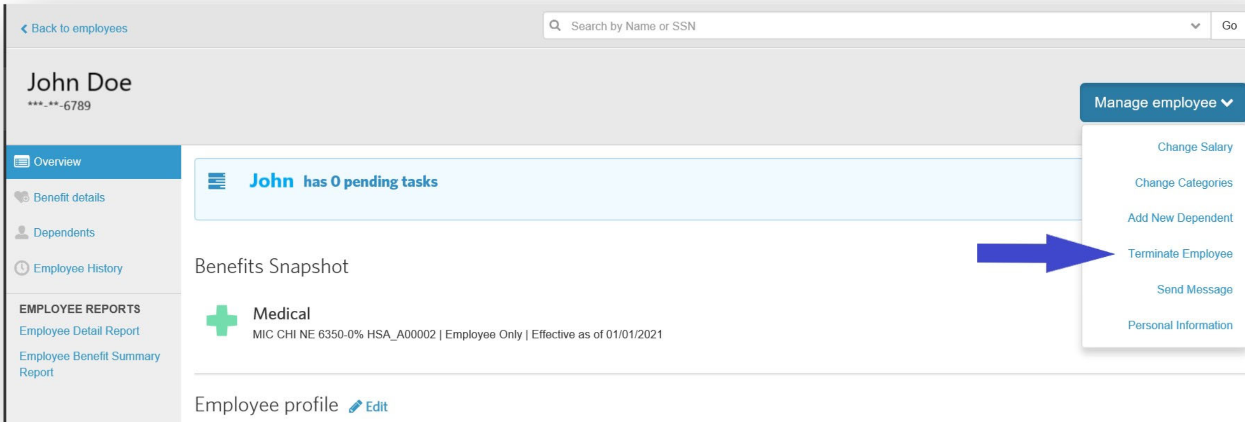


Terminating an Employee

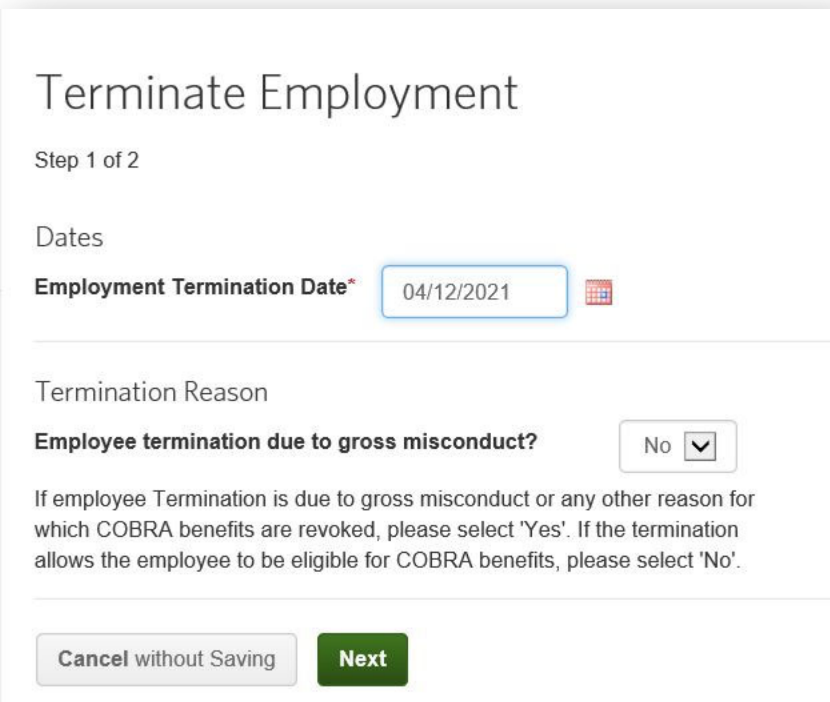
Terminating employment changes the status of the employee form *Active* to *Terminated* and also cancels all benefits for the employee.

Follow the steps below to terminate an employee:

1. From the **Manage employee** drop down menu, select **Terminate Employee**.



2. On the Terminate Employment page, enter the employment termination date for the employee in the **Employment Termination Date** field. In the Termination Reason section, provide an answer to the **"Employee termination due to gross misconduct?"** drop-down menu.



3. Verify the benefit cancellation date for each benefit available. This date is prepopulated based on the employee's termination date and Medica's benefit termination rule. Click **Save** if all the information is correct.

   After terminating an employee, the following menu options may appear depending on the configuration for your group.

   - **Undo Employee Termination:** Select this option to revert the termination and reinstate the employee record as it was prior to the termination date. It is best to use this reinstatement option when someone has erroneously terminated the employee.
   - **Rehire Employee:** If the employee is rehired at a later date, select this option to reinstate his or her record. Upon the rehire date, the employee will be able to enroll in benefits based on the rules configured for your group.

Rehire an Employee

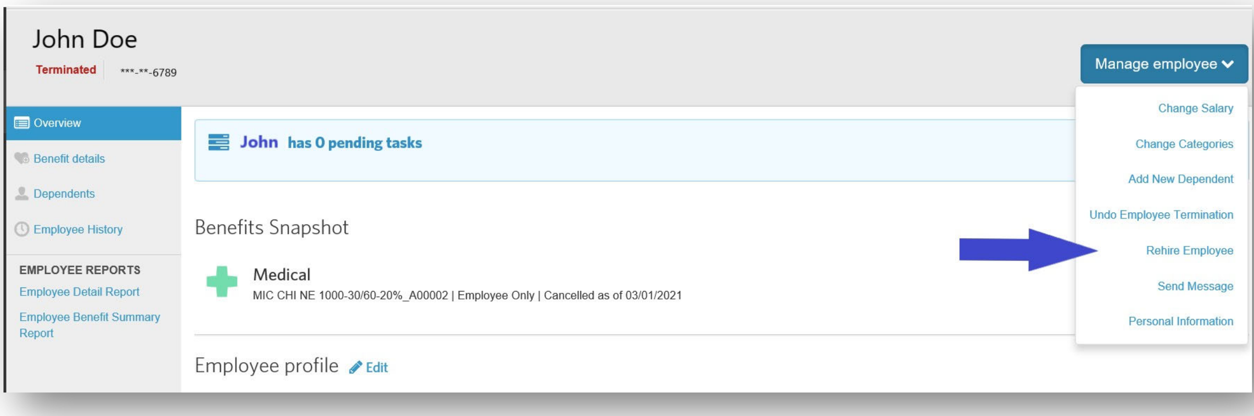
Once employment is terminated, employees can be rehired, and their benefits can be reinstated.

Four options are available for rehiring previously terminated employees:

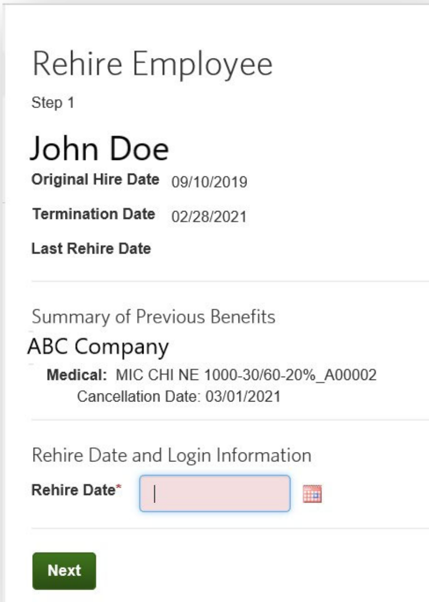
1. Reinstate an employee's benefits as if the employee was never terminated.
2. Reinstate an employee's benefits with no lapse in coverage.
3. Reinstate an employee's benefits without a waiting period.
4. Reinstate an employee's benefits with a waiting period.

Follow the steps below to rehire an employee:

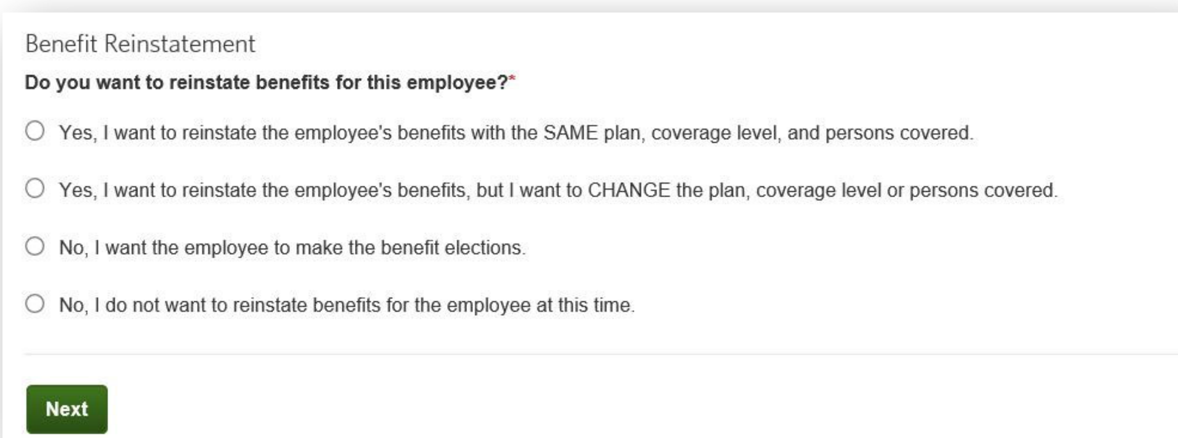
1. Select **Rehire Employee** from the **Manage employee** drop-down menu.



2. Enter the employee’s rehire date in the **Rehire Date** field.



3. Select the appropriate **Benefit Reinstatement** radio button. Click **Next**.
   - Selecting **Yes, I want to reinstate the employee’s benefits with the SAME plan, coverage level and persons covered** will automatically reinstate the employee’s benefits with the applicable effective date.
   - Selecting any other option will rehire the employee, but benefits will not be reinstated. Either you or another administrator must re-enroll the employee in benefits after you complete the rehire process.



4. Review the summary of benefits list with the new coverage dates. Click **Next** if everything is correct.
5. Click **Save**.

COBRA Administration

We recommend terminating an employee from the plan immediately, rather than waiting until they have made their COBRA election.

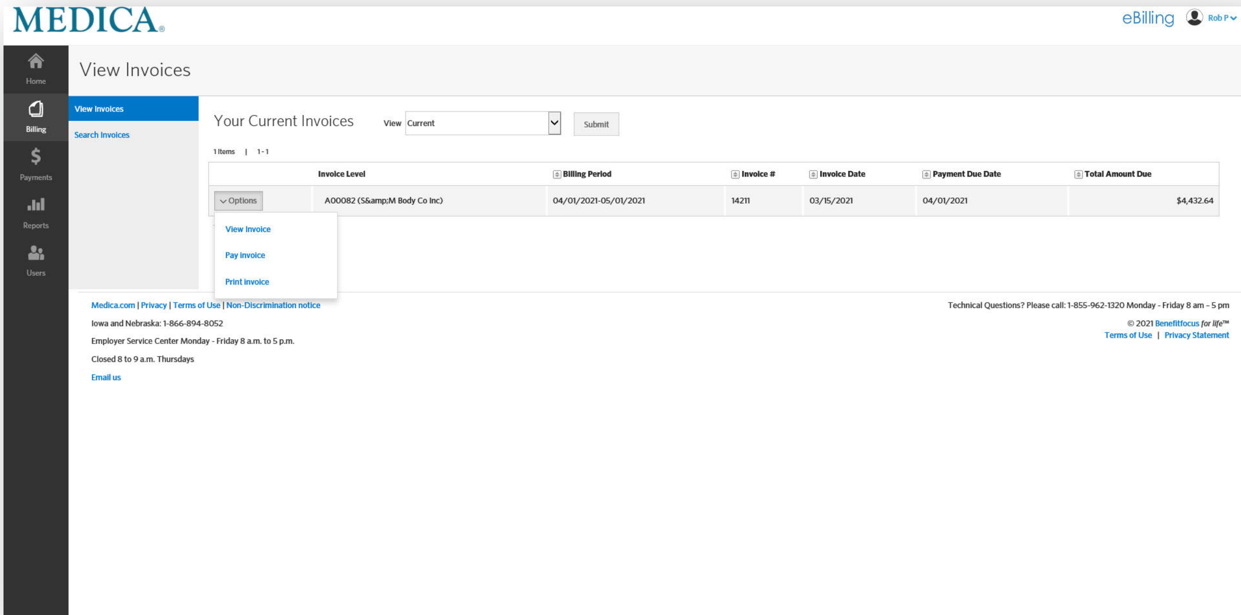
Once the employee and/or their dependents have elected COBRA coverage, use the following steps:

1. Search for **Employee/Former Employee**
2. Click on **Name**
3. Click **Manage Employee/Undo Employee Termination**
4. Review current information
5. Click **Undo Termination** button
6. Click **Return To Employee Profile**
7. If you have **Categories** that separate *Active* from *COBRA* participants, click **Edit** next to the **Categories** section.
8. Enter the **Effective date** of the change
9. Pick the new **Category** from the dropdown
10. Click **Next**
11. Review info for accuracy and click **Save**

If the employee isn't electing COBRA coverage but the dependents of the terminated employee are electing COBRA, enroll the dependents on a new policy of their own, as if they were an employee. Follow the same steps as adding a new employee in the enrollment section.

Billing and Payments

This section provides information on the basics of working with the Billing and Payments application. By default, your most recent invoices are displayed on the home page. You can view additional invoices and invoice information on the **Billing** tab, which also enables you to search for invoices and adjustments.



Viewing Invoices

You can search for invoices by an invoice status:

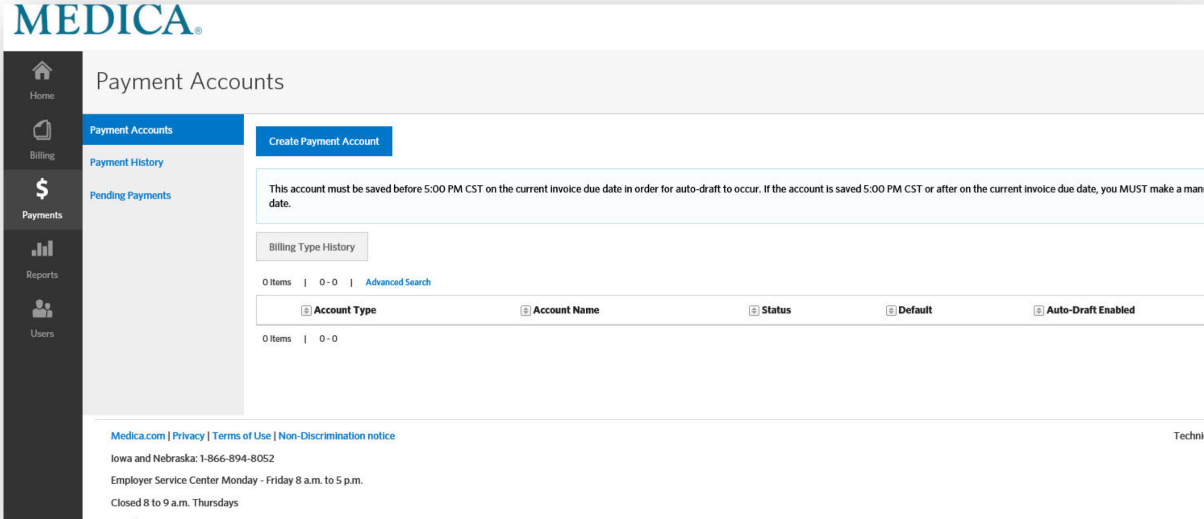
- **Current** invoices belong to the current coverage period
- **Prior** invoices belong to a previous coverage period

The **View Invoices** page provides you with at-a-glance visibility into your invoices. This page provides a list of invoices matching the selected search and filtering criteria, along with high-level information such as:

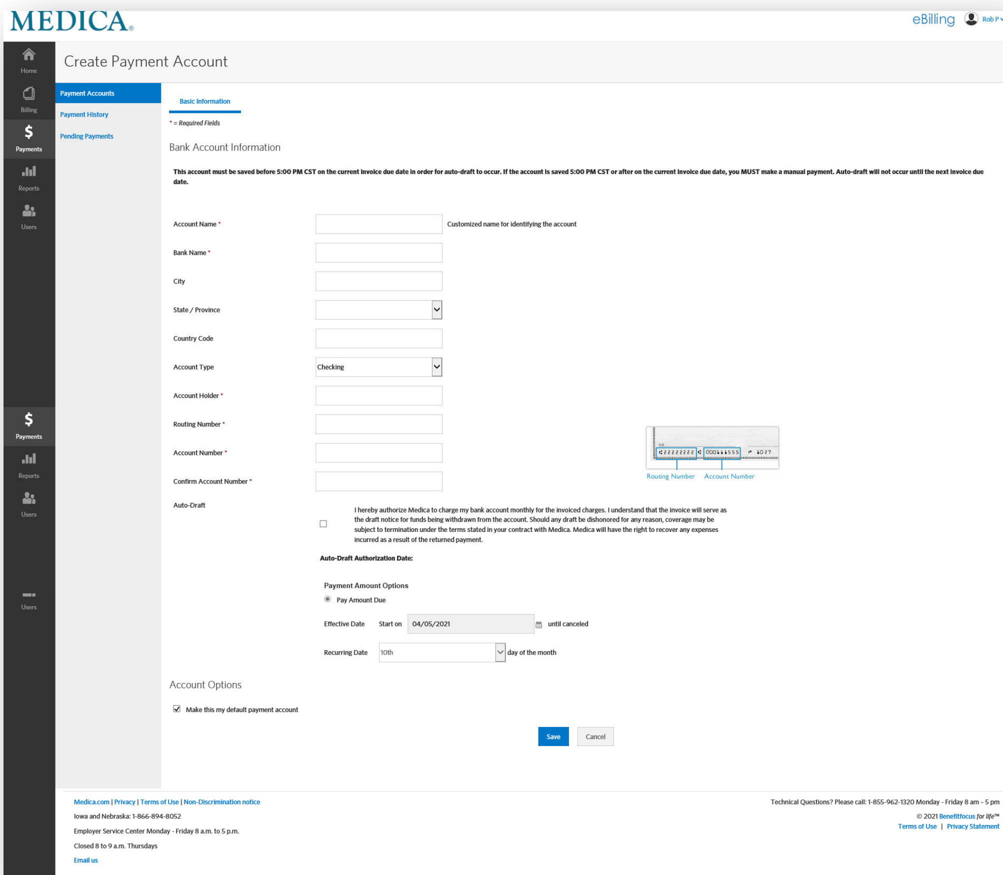
- Billing period
- Invoice number
- Invoice date
- Due date
- Total due

Creating a Payment Account

To set up your bank account for Automatic Clearing House (ACH) payments, from the Payment Accounts page, click **Create Payment Account**.

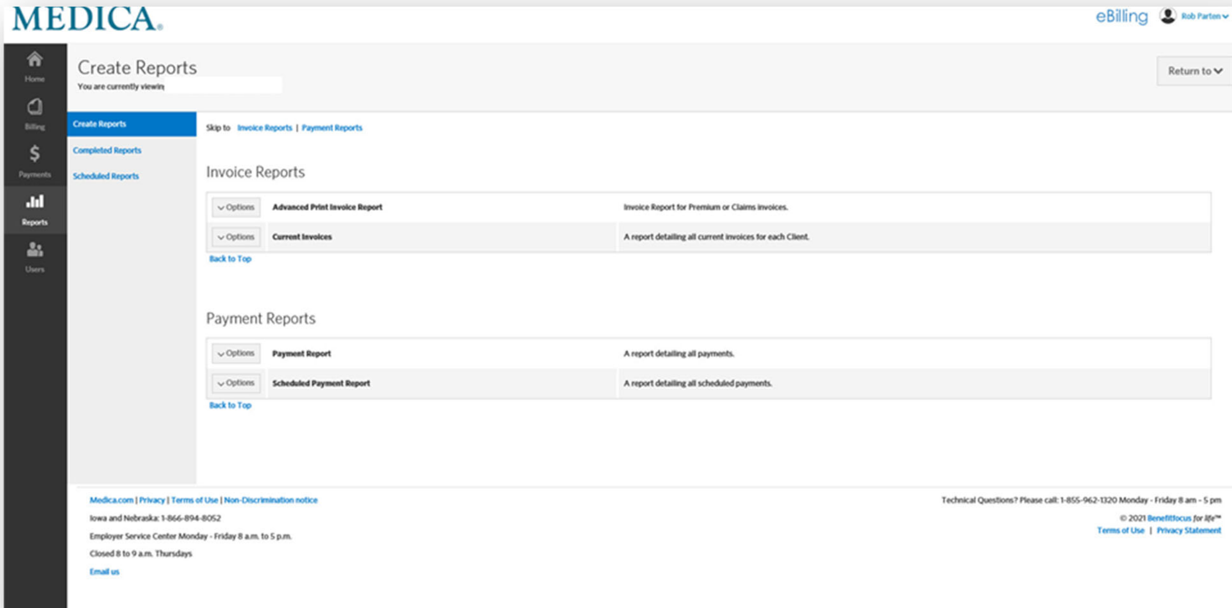


Enter the payment account details.



Downloading Invoices

To download invoices go to the **Create Reports** tab and select **Advanced.** This will allow you to download your invoice.



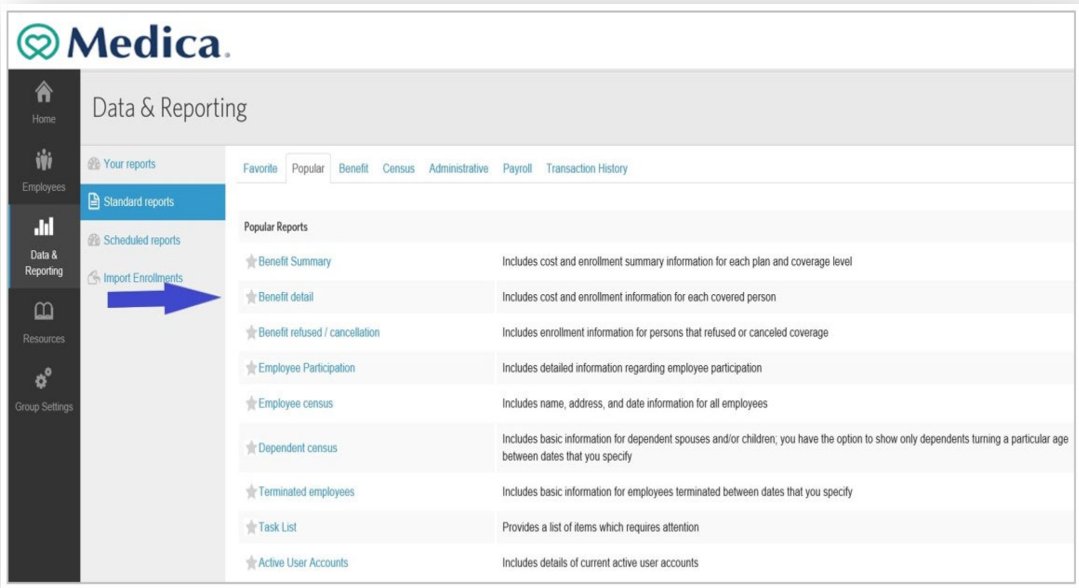
Reporting

Benefit Detail Report

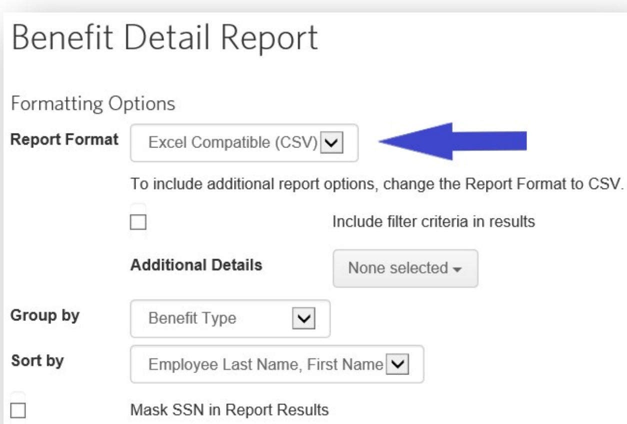
The benefit detail report is a standard report that contains benefit information for your employees.

Follow the steps below to run a standard report, such as the Benefit Detail Report:

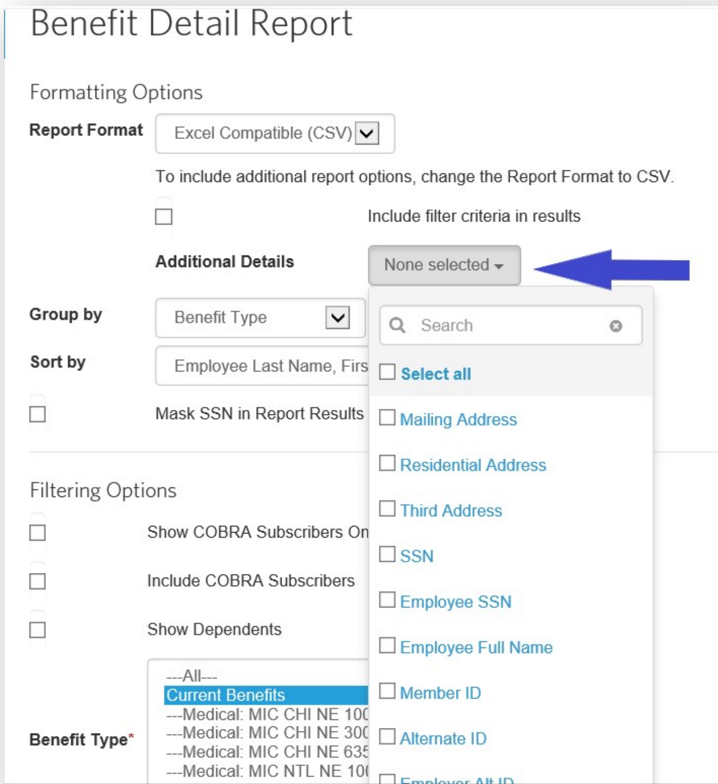
1. From the **Data & Reporting** screen, locate the report from the **Standard reports** tab.



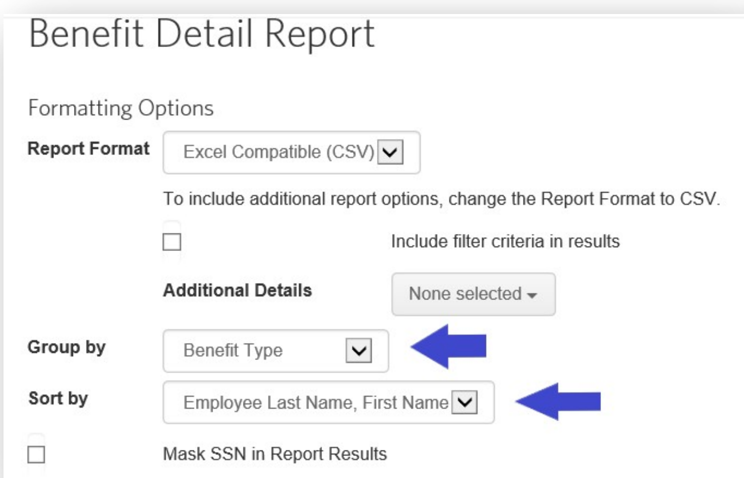
2. Select the format for your report from the **Report Format** drop-down menu. Typically, your options are CSV and PDF. It is recommend that you run your report in the Excel Compatible (CSV) format (the default option) so that you filter the data to include additional criteria, and the data can be sorted and analyzed as needed. This option allows you to include additional details, such as dependents' or employees' benefit details, or social security numbers, which are not included on the report by default.



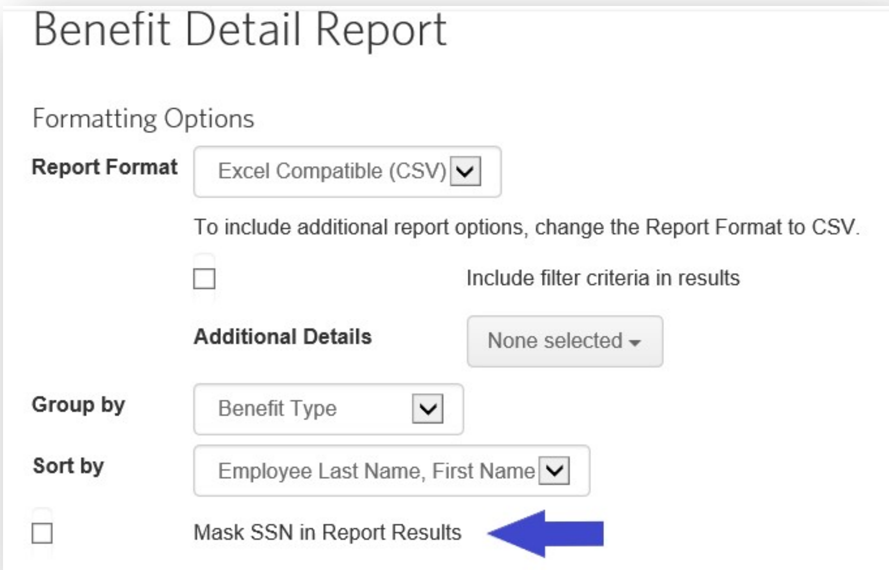
3. Select items from the **Additional Details** drop-down menu if you would like to include other information on the report. For example, you may want to include employees' social security number (masked to show only the last four digits) or categories.



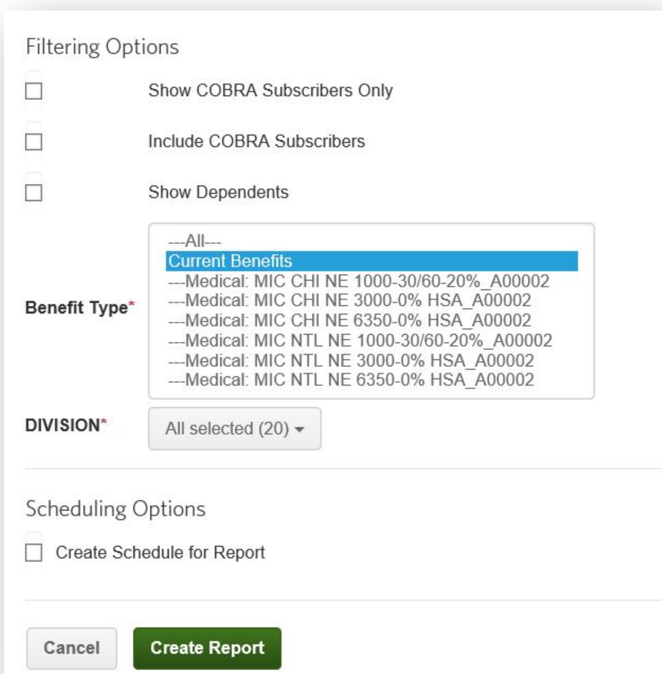
4. Specify options to group together and sort the information on your report.



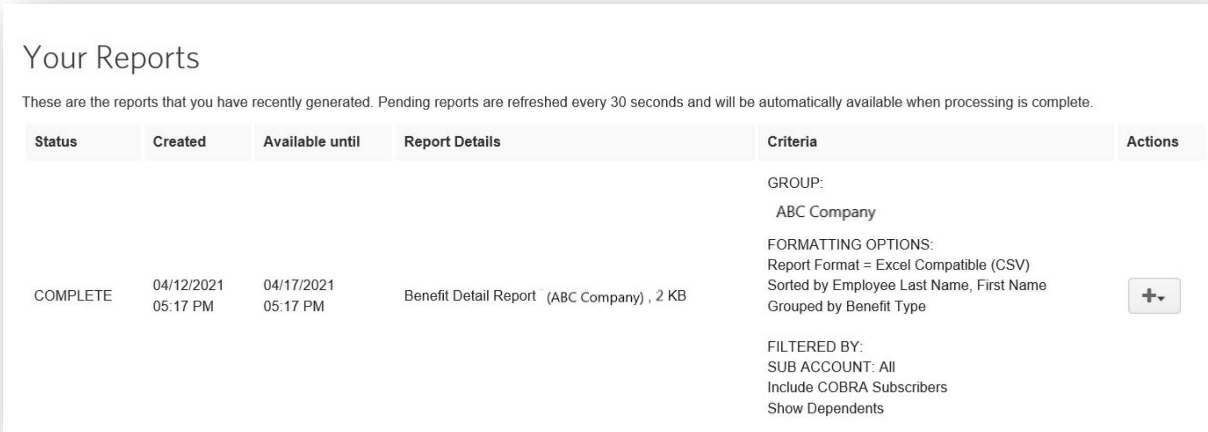
5. Select the **Mask SSN in Report Results** checkbox to only see the last four digits of employees' social security number on the report. Marking this option protects the employee's PHI, so that you can safely share the report.



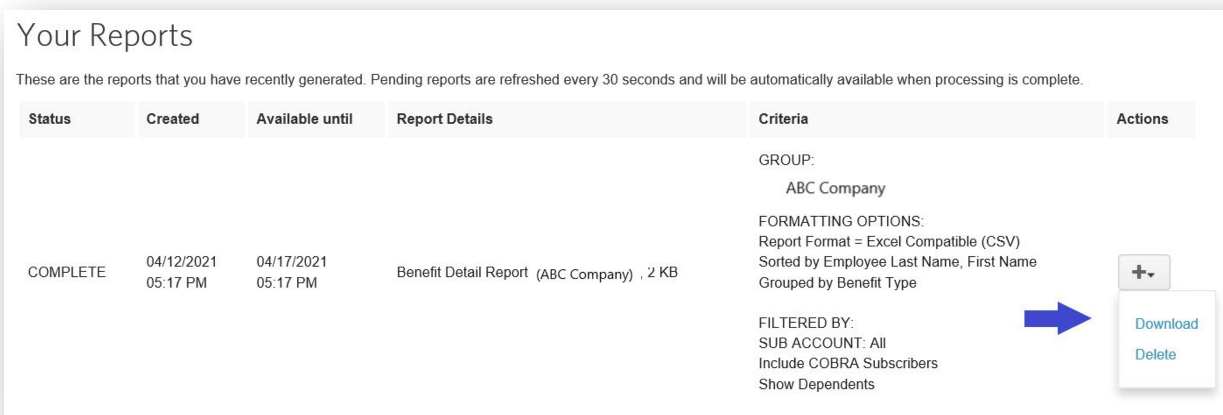
6. Specify filtering options, such as only including certain plans or categories of employees.



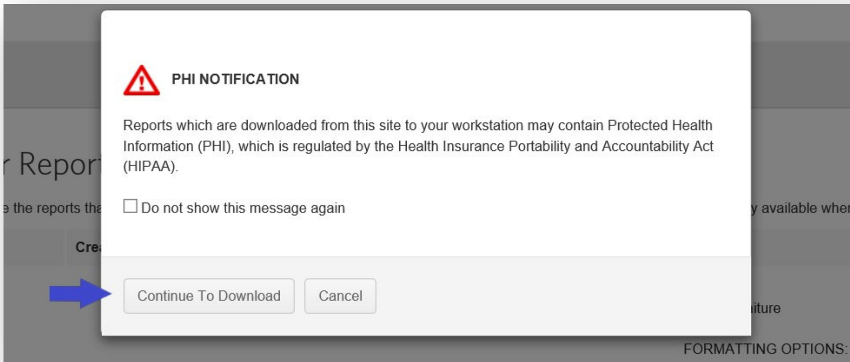
7. Click **Create Report.** You will be brought to the **Your Reports** tab. This tab holds any reports you have run within the last five days. The report will show the report status as PENDING or RUNNING.



8. Click **Download** to retrieve your report once the status is COMPLETE. You also have the option to share or delete complete reports.



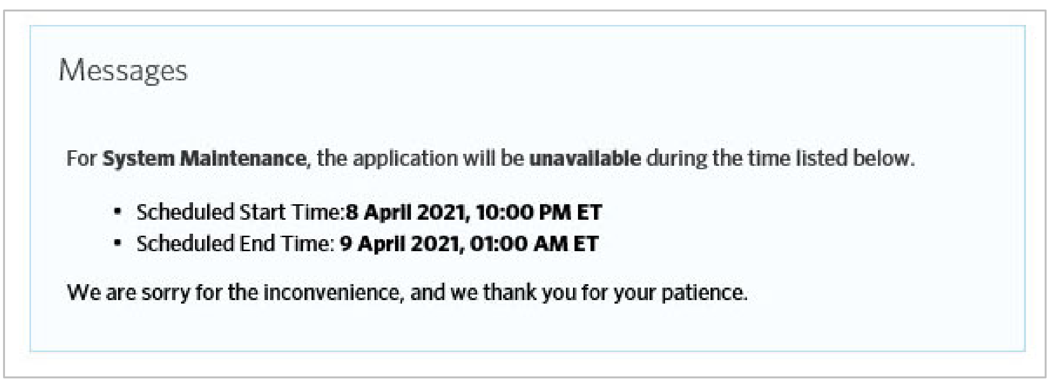
9. Click **Continue to Download** if the application warns you of the potential inclusion of protected health information (PHI) included on the report.



10. The report is downloaded in your browser. Click the file to open the report.

Messages

The Messages area on the Home Page displays important information and instructions. This may include system messages alerting you to any planned application downtime for maintenance or messages from Medica.



Medica Employer Services
Quick Tips

What are my login requirements?

To log into the system, enter your *Username* and *Password* and click ***Log in***. Your *Password* must:

- Contain 8-15 characters
- Contain at least one uppercase letter
- Contain at least one lowercase letter
- Contain at least one number
- Not have more than two of the same characters in a row
- Not be the same as a previous password
- Not contain your *Username*

Session Timeouts

A system message warns you that you will be logged out of the system if you remain inactive. The timeout period is 30 minutes. Ifyou do not respond to the message, you are returned to the login page and must re-enteryour *Username* and *Password*.

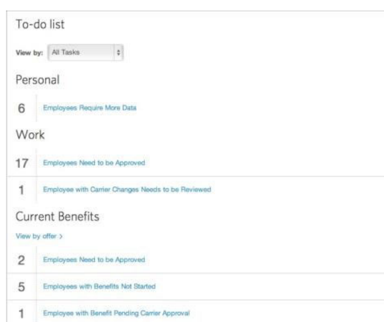
Lockout Process

When you fail to log in after a number ofattempts, your *Username* is disabled. A Systems Administrator must unlock it.

How do I manage my daily tasks?

The *To-Do List* on your home page shows actions that you need to perform based on specific categories of information, such as an employee'sbenefits and tasks on the *Work* or *Personal* tabs.

Keeping up with the items in your *To-Do List* is vital in order to ensure that data is sent quickly and your employees' benefits are processed in a timely fashion.



Note: If your company has over 1000 employees,the **To-Do List** is collapsed by default, and you must select an option from the **View by** drop- down menu to view required tasks.

How do I add new employees?

Add new employees to the system by selecting the **Employees** tab and clicking the **Add New Employee** button.

Note that required fields are identified with an asterisk (*). The following fields are required to add a new employee to the system:

- First and Last Name
- Gender
- Date of Birth
- SSN
- Hire Date
- Address

Other fields may be required, depending onthe settings established for your company.

How do I change plans for an existing employee?

- Search for the employee.
- Select the **Benefit Details** link for the employee.
- Edit the benefit election.
- Note: You may be required to enter a life event, such as birth, marriage, etc. as a reason for changing the employee's benefit plan.
- Click the **Edit** button next to the **Plan** section to change the benefit plan.
- Select the new benefit plan and click **Next**.
- Continue with the enrollment flow and click **Save** when you have completed the plan change.

How do I order ID Cards and welcome kits?

- ID Cards and welcome kits are automatically issued when employees are added or changes are made.
- To order an ID card, please have your employee login to **Medica.com/SignIn**, or call customer service.

How do I cancel a benefit policy without changing the employee's active status?

When you cancel benefits for employees,they remain as *Active* employees.

- Search for the employee.
- Select the **Benefit Details** link for theemployee.
- Edit the benefit election.
- Click the **Cancel Benefits for All** button.

- Click **OK** on the warning message that displays to confirm you want to cancel benefits.
- ***Note***: You may be required to enter a life event, such as birth, marriage, etc.as a reason for changing the employee's benefit plan.
- Enter the date to cancel benefits and click **Next**.
- Review and **Save** the changes.

How do I change an effective date after the employee is enrolled?

Please contact Medica to make this change.

What reports can I access?

You can create numerous group reports, including *Benefit Detail*, *Employee Census* and *Dependent Census* reports. From the **Data & Reporting** tab, you can:

- Generate reports in multiple file formats, including PDF, Excel or CSV.
- Sort report data by employee name or SSN.
- Group and/or filter report data.

You can also generate employee-specific reportsfrom the **Employee Reports** section of the employee's record.

How do I terminate employment?

What's the difference between cancelling benefits and terminating employment?

When you cancel benefits for employees,the employee remains in an *Active* status.

Terminating employment changes the status of the employee from *Active* to *Terminated* and also cancels all benefits for the employee.

- Search for the employee.
- Select **Terminate Employment** from the
- **Manage Employee** drop-down menu.
- Enter the employment terminationdate for the employee.
- Enter a **Termination Reason** and click **Next**.
- Review the benefit cancellation date foreach benefit available. This date is pre- populated based on the employee's termination date and the benefit termination rule.
- **Save** the changes.

How do I rehire employees?

Once employment is terminated, employees can be rehired and their benefits can be reinstated.

To rehire an employee:

- Search for the employee.
- Select **Rehire Employee** from the **Manage Employee** drop-down menu.
- Enter the employee's rehire date.
- Click **Next**.
- Select the appropriate **Benefit Reinstatement** radio button.
- If applicable, specify how to reinstate the employee's benefits.
- Review the rehire information and click **Save**.