



USER GUIDE

# Employer eServices® Portal

MEDICA®

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# Welcome to Employer eServices!

Manage your benefits administration online with Employer eServices. This suite of internet-based applications offers you immediate and secure access to manage health care benefits information.

Through the Employer eServices website, [www.employereservices.com](http://www.employereservices.com), you can:

- Enroll new employees immediately
- Verify or change eligibility information
- Request an employee ID card
- Terminate and reinstate employees

Enjoy fast service, simplified invoices, and immediate access to downloadable data through our electronic billing capability. Employer eServices also:

- Automatically notifies you via email when your online invoices are ready for viewing
- Allows you to view current or prior period activity
- Gives you the ability to download invoice detail (please note: If you have electronic billing, you will not receive hard copy invoices)
- Let's you pay your bill online

## QUESTIONS?

For more information about Employer eServices from Medica or to register, contact the Medica Service Center:

- **Phone:** 800-936-6880
- **Email:** [medicaservicecenter@medica.com](mailto:medicaservicecenter@medica.com)

## REGISTRATION

Upon registration for eServices, you will receive an email from eServices [Employer\\_eServices@uhc.com](mailto:Employer_eServices@uhc.com). The email will contain a link that you will follow to complete your registration and create a login for Employer eServices.

Have a general question about Employer eServices or experience a technical issue while using eServices? Contact the Employer eServices customer support:

- **Phone:** 800-651-5465

**Employer eServices**

Welcome to your benefits administration site.

[Log In](#)

If you experience issues logging in, click here or call Employer eServices Help Desk at 1-800-651-5465.

[View Login Help](#) →

**Information You Need When You Need It**

**Employer eServices**

- Eligibility Updates
- Pay Invoices Online
- Wellness Tools & Tips
- And More!

Enjoy a powerful suite of online tools and resources that simplify your job and create a better experience for everyone.

[Tour the New Site](#) →

# Homepage

HOME

In this section, we will highlight the key parts of the homepage.

## 1 ACCOUNT OPTIONS

**My Profile:** Once you've logged in, review your profile for accuracy and make any needed changes.

**Manage Users:** See Page 30 for more details on this functionality.

## 2 MENU BAR

**Select Group:** Select the plan you will be working in.

- If you offer multiple plan or network options to your employees, they will each be represented by their corresponding group number.

You will find these group numbers in the **Select Group** drop down tab. It is important to be aware of which group number you are working in. You are only able to work with one group number at a time. When working with multiple group numbers, you will need to re-select that group number in the **Select Group** drop down box.

**Dashboard:** Your homepage.

**Manage Employees:** This is where you initiate transactions.

**Invoices:** This is where you can access billing statements.

Access to features in **Manage Employees** and **Invoices** may vary depending on access granted as indicated during registration.

For example:

- Sally Smith in the account payable department may only have been given access on the registration form to access the **Invoice** tab. While Jane Doe in human resources was given access to the **Manage Employees** tab.

The screenshot shows the Medica Employer eServices homepage. At the top right, there are links for Alerts (0) & Notifications (0), My Profile, Manage Users, Help, and Log Out. The main header includes the Medica logo and 'Employer eServices'. Below this, a navigation bar contains a 'Select Group' dropdown menu, 'Dashboard', 'Manage Employees', and 'Invoices'. A 'Featured Highlights' section features a video titled 'Welcome to the new Employer eServices' with a 'Learn More' link. To the right is a 'Quick Links' sidebar with links to 'Medica.com' and 'Scheduled Direct Debit Form', and a 'Help' section with 'Employer eServices Help'. Below the highlights are two main sections: 'Search for Employees' with a search box and a list of actions (Change Coverage, Edit Information, Add a Dependent, Remove Coverage, View Claims, Request ID Cards), and 'Add New Employee' with a '+ Add New Employee' button.

## 3 RIGHT SIDEBAR MENU – QUICK LINKS

**Medica.com:** This will direct you to the homepage of Medica's main website.

**Scheduled Direct Debit Form:** Set up an automated payment.

# Enrollment

HOME

## ADDING NEW EMPLOYEES

- First click on **Select Group** and choose the group number you want to work with.
- Once the group number has been selected, click **Manage Employees** on the menu bar or click the **Add New Employee** button from the home page.

MEDICA® Employer eServices

Welcome Back, John

ABC COMPANY PLAN 1 | Dashboard | Manage Employees | Invoices

ABC COMPANY PLAN 2

ABC COMPANY PLAN 3

ABC COMPANY PLAN 4

Welcome to the new Employer eServices

Access videos and a demo to learn about the new website.

Learn More →

Quick Links

- Medica.com
- Scheduled Direct Debit Form

Help

- Employer eServices Help

**Search for Employees**

Find an employee to view their plan details. You can also:

- Change Coverage
- Edit Information
- Add a Dependent
- Remove Coverage
- View Claims
- Request ID Cards

Enter Name or Employee ID (Enter Last Name, First Name)

+ Add New Employee

- Enter the effective date and click **Continue**. The **Original Effective Date** is the date the coverage should begin.

Overview | ID Cards

Employee and Dependents

New Enrollment

1 Add Employee | 2 Assign Plans | 3 Review & Submit

ADD EMPLOYEE

Please enter demographic information for employee and/or dependents and select next.

DIV : MSP Group# : 11112 - ABC COMPANY

Cancel

EFFECTIVE DATE

Please enter date enrollee is eligible for benefits. \* Required

Original Effective Date \* MM/DD/YYYY Continue

Search for Employees

Name or Employee ID

+ Add New Employee

Manage Employees Help

- Search for Employees Help
- Manage Employees Help
- Enrollment FAQ

- Enter employee demographic information.
- Once you're done adding an employee, you can add dependents. If no dependents need to be added, click **Next**.

**EMPLOYEE**

\* Required

**DEMOGRAPHICS**

<b>First Name *</b> <input type="text" value="John"/>	<b>Middle Initial</b> <input type="text" value="J"/>	<b>Last Name *</b> <input type="text" value="Doe"/>
<b>Employee ID *</b> <input type="text" value="XXXXX4321"/>	<b>Social Security #</b> <input type="text"/>	<b>Company ID</b> <input type="text"/>

Note: Please enter SSN into Employee-ID field as Identification Method

<b>Gender *</b> <input type="text" value="MALE"/>	<b>Date of Birth *</b> <input type="text" value="01/01/1970"/>	<b>Marital Status *</b> <input type="text" value="MARRIED"/>
<b>Date of Hire *</b> <input type="text" value="03/01/2017"/>	<b>Original Effective Date *</b> <input type="text" value="09/01/2018"/>	<b>Department *</b> <input type="text" value="TEST DEPT 1"/>
<b>Language *</b> <input type="text" value="ENGLISH"/>	<b>Wait Period *</b> <input type="text" value="NO"/>	

Has Cobra coverage

**ADD DEPENDENT(S)**

[Cancel](#)
**Next**

## TIPS

- Only fields marked with an asterisk are required. The **Company ID** field should be left blank.
- Employee ID = SSN. It does not need to be entered again in the **Social Security #** field. Once entered, the first 5 digits will change to Xs for security purposes.
- If an employee has a wait period, select Yes in the **Wait Period** drop down and enter the hire date in the **Wait Begin Date** field that will appear.
- If you have departments, you will be presented with this field. If you do not have this as part of your client setup, the field will not be displayed\*.

\*If you have previously requested departmentalized billing to break out employees on your invoice, your list of department codes will be found in the drop down. When you sign up to have your invoices in eServices, you will see these codes on this spreadsheet invoice in the column titled **Customer Defined Sort**.

## ADDING DEPENDENTS

- Complete the dependent information.
- Click **Add Another Dependent** to add more dependents. Click **Next** when finished adding dependents.

**DEPENDENT(S)**

\* Required

NEW DEPENDENT
Remove Dependent

<b>First Name *</b>	<b>Middle Initial</b>	<b>Last Name *</b>
<input type="text"/>	<input type="text"/>	<input type="text" value="Doe"/>
<b>Social Security #</b>	<b>Relationship *</b>	
<input type="text" value="###-##-####"/>	<input type="text" value="--SELECT ONE--"/>	
<b>Gender *</b>	<b>Date of Birth *</b>	<b>Original Effective Date *</b>
<input type="text" value="--SELECT ONE--"/>	<input type="text" value="MM/DD/YYYY"/>	<input type="text" value="09/01/2018"/>
<b>Wait Period *</b>		
<input type="text" value="NO"/>		
<input type="checkbox"/> Address & phone is different than the employee		

**Add Another Dependent**
Why aren't dependents offered Cobra coverage?

Cancel
**Next**

- The last name will pre-fill with the last name of the employee. If the last name is different than the employee's last name, you can change this field.
- Select **Spouse** or **Child** from the **Relationship** drop down. Do not use the **Other** option.





## PRIMARY CARE CLINIC - For ACO / Medica Elect / Medica Essential products

The process for assigning Primary Care Clinics works the same regardless of product. The difference is that for ACOs you will be assigning the same default clinic to all enrollees, whereas for Elect and Essential you will be assigning the specific clinic that each enrollee has chosen as the location where they will seek their primary care.

### Assigning the Primary Care Clinic for the employee (Elect and Essential)

- Click **Assign Provider**.

The screenshot shows the 'PLANS' interface. At the top, there is a 'MEDICAL \*' section with a sub-header 'Please select a Medical product'. Below this, there are two rows of plan information. The first row is for 'JOHN DOE (EMPLOYEE)' with 'MEDICAL' plan and 'Coverage Begins' date of '09/01/2018'. Underneath this row, the 'Provider Information \*' section has an 'Assign Provider' button circled in red. The second row is for 'JANIE DOE (CHILD)' with 'MEDICAL' plan and 'Coverage Begins' date of '09/01/2018'. Underneath this row, the 'Provider Information \*' section has a dropdown menu set to '-- SELECT ONE --' and an 'Assign Provider' button. There are also 'Expand All | Collapse All' links and a '\* Required' indicator at the top of the plan selection area.

#### Step 1: Enter Search Criteria

- Enter only the first word of the clinic name. This will provide the best search results.
- Change **Provider Type** drop down to **Primary Care Clinic**.
- Leave **Zip Code** blank.
- Click **Search**.

The screenshot shows the 'PROVIDER SEARCH' dialog box. It has a title bar with a close button. Below the title bar, it says 'STEP 1: Enter Search Criteria' and '\* Required'. A note states 'A wildcard search is available with 3 characters and an asterisk(\*)'. There are four input fields: 'Name \*' with the value 'TEST', 'Provider Type' with a dropdown menu set to 'PRIMARY CARE CLINIC', 'Zip Code' (empty), and 'Provider Effective Date' with the value '09/01/2018'. There is a 'Search' button and a 'Cancel' link at the bottom left.

#### Step 2: Select a Provider

- Select the Primary Care Clinic from the list of results.
- Click the **Assign Provider** button.

**PROVIDER SEARCH** ✕

**STEP 1: Enter Search Criteria** \* Required

A wildcard search is available with 3 characters and an asterisk(\*)

**Name \***  **Provider Type** PRIMARY CARE CLINIC

**Zip Code**  **Provider Effective Date**  Search

---

**STEP 2: Select a Provider**

Please select a Provider from the list for more details.

**Search Results** (8 results) Filter by Provider Type: --SELECT ONE--

Name	Provider Type	City	State
TEST PROVIDER 1	PRIMARY CARE CLIN	SAINT PAUL	MN
TEST PROVIDER 2	PRIMARY CARE CLIN	BLOOMINGTON	MN
TEST PROVIDER 3	PRIMARY CARE CLIN	MINNEAPOLIS	MN
TEST PROVIDER 4	PRIMARY CARE CLIN	SAINT PAUL	MN
TEST PROVIDER 5	PRIMARY CARE CLIN	HOPKINS	MN
TEST PROVIDER 6	PRIMARY CARE CLIN	INVER GROVE HEIGHTS	MN

Page 1 of 1 | 10 | View 1 - 8 of 8

---

**Selected Provider Details**

Name: TEST PROVIDER 5 HOPKINS  
 Address: 123456 TEST WAY  
 HOPKINS MN 55343 7782  
 Provider ID: 0000-0004246  
 Phone Number: (952) 555-0000

Assign Provider

### Assigning the Primary Care Clinic for the employee (ACO)

- Click **Assign Provider**.
- **Step 1: Enter Search Criteria**
  - Enter only the first word of the ACO name (ex. Altru, Essentia, Ridgeview, etc.).
  - Change **Provider Type** drop down to **Primary Care Clinic**.
  - Leave **Zip Code** blank.
  - Click **Search**.
- **Step 2: Select a Provider**
  - Select the Primary Care Clinic from the list of results (only one result should be displayed for ACOs).
  - Click the **Assign Provider** button.

**PROVIDER SEARCH** ✕

**STEP 1: Enter Search Criteria** \* Required

A wildcard search is available with 3 characters and an asterisk(\*)

**Name \***  **Provider Type** PRIMARY CARE CLINIC

**Zip Code**  **Provider Effective Date**  Search

---

**STEP 2: Select a Provider**

Please select a Provider from the list for more details.

**Search Results** (1 results) Filter by Provider Type: --SELECT ONE--

Name	Provider Type	City	State
ESSENTIA NETWORK	PRIMARY CARE CLIN	MINNETONKA	MN

Page 1 of 1 | 10 | View 1 - 1 of 1

---

**Selected Provider Details**

Name: ESSENTIA NETWORK  
 Address: 401 CARLSON PKWY  
 MINNETONKA MN 55305 5359  
 Provider ID: 0000-0018263  
 Phone Number: (800) 458-5512

Assign Provider

**NOTE**

For ACO products, although the employee and their dependents do not need to select a Primary Care Clinic, eServices still requires the assignment of a default ACO clinic. The member is still able to choose any provider within the network. When the search results for the ACO are displayed, the clinic address will appear as 401 Carlson Pkwy, Minnetonka, MN 55305. This is not an error, it is a default address.

**Assigning the Primary Care Clinic for dependents**

There are two ways to assign a Primary Care Clinic for dependents:

1. Click the **Assign Provider** button and follow the same steps used for the employee.
2. To assign the same Primary Care Clinic as the employee or any other family member that has already been completed, select that family member from the **Same Provider as** drop down.

**MEDICAL \***

Please select a Medical product

**JOHN DOE (EMPLOYEE)**

Plan Selection	Coverage Begins	Coverage Ends
MEDICAL	09/01/2018	
<b>Class Code</b>		
CLASS CODE 4		
<b>Provider ID</b>	<b>Provider Name</b>	
0000-0004246	TEST PROVIDER HOPKINS	

**Other Family Members**

- JANE DOE (SPOUSE)
- JOHNNY DOE (CHILD)
- JANIE DOE (CHILD)

Plan Selection	Coverage Begins	Coverage Ends
<input checked="" type="checkbox"/> MEDICAL	09/01/2018	

**Provider Information \*** Same Provider as

**Assign Provider**

JOHN DOE (EMPLOYEE)  
 JANE DOE (SPOUSE)  
 JOHNNY DOE (CHILD)

## MEDICARE AND OTHER INSURANCE

- Click on **Medicare** or **Other Insurance** if the employee does have additional medical coverage. Those sections will open for additional information to be entered.
- If the employee does not have other medical insurance coverage, click **Next**.

**Provider Information \*** Same Provider as

**Provider ID [Edit](#)** **Provider Name**  
 0000-0004254 TEST PROVIDER

JANIE DOE (CHILD) MEDICAL

**Provider Information \*** Same Provider as

**Provider ID [Edit](#)** **Provider Name**  
 0000-0004254 TEST PROVIDER

**MEDICARE**

**OTHER INSURANCE**

[Cancel](#)

- If any of these data fields are unknown, it is best to skip the entire **Medicare** or **Other Insurance** section.
- When finished, click **Next**.

**Employee** **Covered?**  
 JOHN DOE (EMPLOYEE)  Yes  No

**Dependents** **Covered?**

JANE DOE (SPOUSE)  Yes  No

JOHNNY DOE (CHILD)  Yes  No

JANIE DOE (CHILD)  Yes  No Same Information as

**CLAIMS ADDRESS**

**Insurance Company Name \*** **Address Line 1** **Address Line 2**

**City \*** **State \*** **Zip Code \***

**POLICY HOLDER**

**Policy Holder Name \*** **Date of Birth \*** **Policy ID/Group Number \***

**Policy Effective Date \*** **Policy Expiration Date**

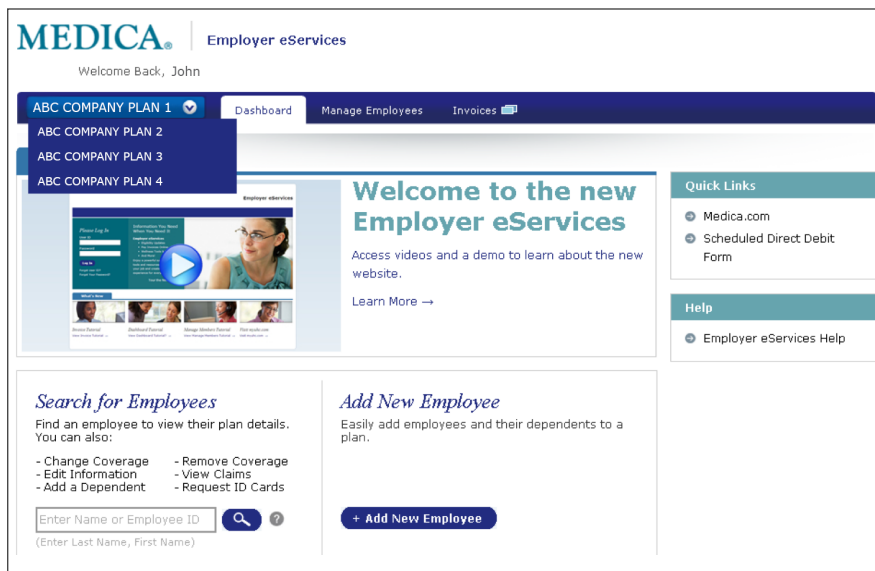
[Cancel](#)



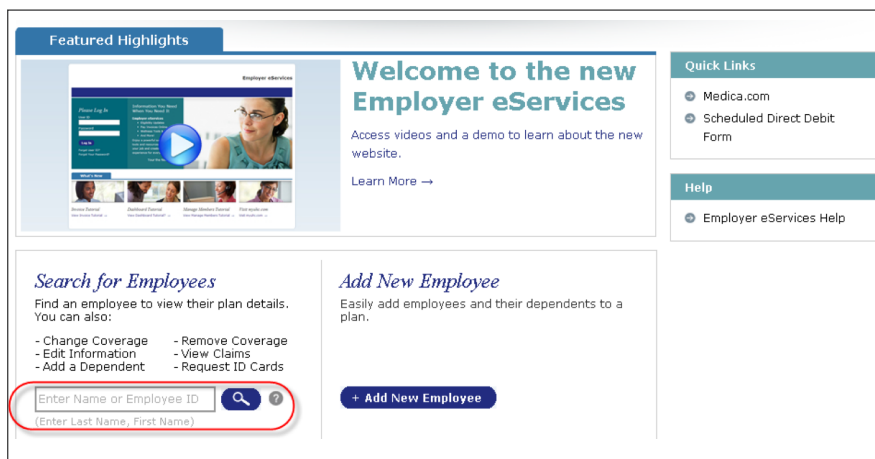
## VIEWING AND UPDATING EMPLOYEE AND DEPENDENT INFORMATION

You will have the option to edit, terminate or reinstate coverage in this section.

- Be sure to select the group number the employee is in prior to performing a search.



- Enter the search criteria. There are two ways to do this:
  - Enter the last name of the employee to view that person’s information and any dependents under their coverage. If entering a last name, the search will return all employees with that same last name.
  - Social Security Number (SSN).



- Click the **Search** button.

- View the record by clicking on the employee name or by clicking **Manage** in the **Actions** box. All previously entered information will appear for you to view.

**Search Results**

To manage an employee or their dependents, please select an Action.

[+ Add New Employee](#)

Showing 1 - 3 of 3

Pages: <<First <Previous 1 Next> Last>> [Show Data In a Single Page](#)

Name	EEID	ALT ID	Actions
<a href="#">DOE, JOHN</a>	123456789	N/A	<ul style="list-style-type: none"> <li>Manage JOHN</li> <li>Add Dependent</li> </ul>
<a href="#">DOE, ROBERT</a>	987654321	N/A	<ul style="list-style-type: none"> <li>Manage ROBERT</li> <li>Add Dependent</li> </ul>
<a href="#">DOE, SUZIE</a> DOE, RONALD DOE, SALLY	400012992	N/A	<ul style="list-style-type: none"> <li>Manage SUZIE</li> <li>Add Dependent</li> </ul>

## REVIEW ENROLLMENT

**EMPLOYEE**

[Expand All](#) | [Collapse All](#)

**JOHN DOE (EMPLOYEE)** ACTIVE 09/01/2018

**EMPLOYEE INFORMATION** Edit

**DEMOGRAPHICS**

Employee ID \*\*\*\*\*0103

Social Security # \*\*\*\*\*0103

Company ID

Gender MALE

Date of Birth 01/01/1970

**PLANS** Edit

View: [Plan Details](#) | [Provider Details](#)

- MEDICAL MEDICAL
- MEDICARE
- OTHER INSURANCE

**PLAN DETAILS**

Coverage for : JOHN DOE (EMPLOYEE) Filter by Coverage : VIEW ALL

Coverage	Plan	Coverage Begins	Coverage Ends
MEDICAL	MEDICAL	09/01/2018	
MEDICAL	MEDICAL	04/01/2017	08/31/2018

[Back](#)

**Provider Details**

This list is for reference only.

Providers for : JOHN DOE (EMPLOYEE)

Name	Effective	City	State
ESSENTIA NETWORK	09/01/2018	MINNETONKA	MN
ALTRU NETWORK	04/01/2017 - 08/31/2018	MINNETONKA	MN

**Provider Details**

Name ESSENTIA NETWORK

Address 401 CARLSON PKWY

Provider ID 0000-0018263

Phone Number (800) 458-5512

[Close](#)

By clicking on **Plan Details**, you will be able to view the timeline information for this person.

By clicking on **Provider Details**, you will be able to view the clinic information for those employees who have Elect, Essential or an ACO.

## CHANGE ENROLLMENT

By clicking on the **Edit** button in the **Employee Information** box, you will be able to edit any data field that appears EXCEPT for the employee social security number. Corrections to an employee's SSN must be managed by Medica outside of the eServices portal and should be directed to Medica Customer Services at 800-936-6880. Corrections to dependent SSNs can be made in eServices.

EMPLOYEE

[Expand All](#) | [Collapse All](#)

▲ JOHN DOE (EMPLOYEE)

EMPLOYEE INFORMATION
Edit

▲ **DEMOGRAPHICS**

**Employee ID**            \*\*\*\*\*0103

**Social Security #**       \*\*\*\*\*0103

**Company ID**

**Gender**                    MALE

**Date of Birth**             01/01/1970

- Make any needed updates to the employee's information and click **Submit**.

EMPLOYEE

\* Required

▲ JOHN DOE (EMPLOYEE) ACTIVE 09/01/2018

**DEMOGRAPHICS**

<b>First Name *</b> JOHN	<b>Middle Initial</b> 	<b>Last Name *</b> DOE
<b>Employee ID</b> *****0103	<b>Social Security #</b> XXX-XX-0103	<b>Company ID</b> 
<b>Gender *</b> MALE	<b>Date of Birth *</b> 01/01/1970	<b>Marital Status *</b> MARRIED
<b>Date of Hire *</b> 03/01/2017	<b>Original Effective Date *</b> 09/01/2018	<b>Department</b> TEST DEPT 1
<b>Language *</b> ENGLISH	<b>Wait Period *</b> NO	

Has Cobra coverage

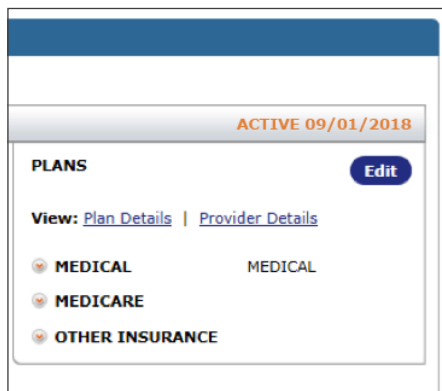
**ADDRESS & PHONE**

<b>Country</b> UNITED STATES	<b>Address Line 1 *</b> 12345 Test Way	<b>Address Line 2</b> 
<b>City *</b> DULUTH	<b>State *</b> MINNESOTA	<b>Zip Code *</b> 55807-####
<b>Home Phone</b> (###) ###-####	<b>Work Phone</b> (###) ###-####	

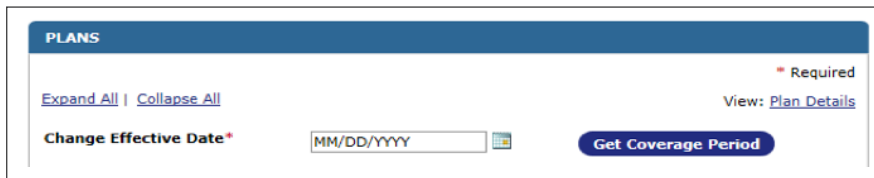
[Cancel](#)
Submit



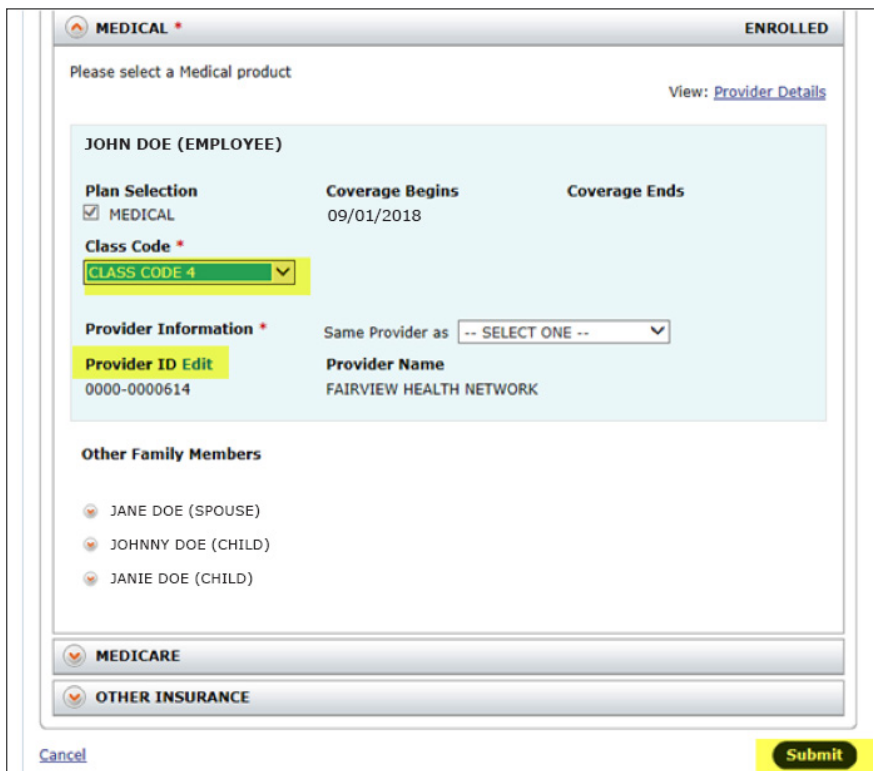
By clicking on the **Edit** button in the **Plans** box, you will be able to edit the **Primary Care Clinic** or the **Billing Class Code**.



- Once you have clicked on the **Edit** button, you will then enter the effective date of the change and click the **Get Coverage Period** button.



- From here, you can either update the **Class Code** or **Provider Information**. Once the change has been made, click **Submit**.



## NOTE

Changes to the billing class code are made after there has been a dependent addition or termination impacting the coverage level of the employee. Once the dependent has been added (or terminated), return to the employee record. Click the **Edit** button under **Plans**. The effective date should coincide with the date the dependent was added or terminated. If dependent was added effective 1/1/18, make the change effective 1/1/18. If dependent was terminated effective 1/31/18, make the change effective 2/1/18.

## TERMINATIONS

Clicking the **Terminate** button in the **Employee Information** box allows you to terminate the employee and/or any of their dependents. Terminating the employee will automatically terminate all of their dependents.

**EMPLOYEE**

[Expand All](#) | [Collapse All](#)

**JOHN DOE (EMPLOYEE)** ACTIVE 09/01/2018

EMPLOYEE INFORMATION	PLANS
<p><b>DEMOGRAPHICS</b></p> <p>Employee ID: 987654321</p> <p>Social Security #: *****4321</p> <p>Company ID:</p> <p>Gender: MALE</p> <p>Date of Birth: 01/01/1970</p> <p>Marital Status: MARRIED</p> <p>Date of Hire: 03/01/2017</p> <p>Original Effective Date: 09/01/2018</p> <p>Department: 001-TEST DEPT 1</p> <p>Language: ENGLISH</p> <p>Wait Period: NO</p> <p>Has Cobra Coverage: NO</p>	<p><b>View: <a href="#">Plan Details</a></b></p> <p>MEDICAL: PASSPORT</p> <p>MEDICARE</p> <p>OTHER INSURANCE</p>

**ADDRESS & PHONE**

**Terminate** **Reinstatement**

**Add A Dependent**

- Follow your group contract when entering termination dates. Most events have an “end of month” termination date. Some self-insured customers’ contracts may state “date of event.” The date you enter is the last day of coverage. For example, if the employee’s last day of employment was 7/11/17, you would enter the coverage end date as 7/31/17.

- Once you have selected the enrollee(s) to be terminated, pick the **Coverage End Reason** from the drop down box.
- Click **Submit** when finished.

[Cancel](#) **Submit**

**TERMINATE** \* Required

Please select the employee and/or the dependent(s) you want to terminate.

Employee / Dependent(s)	Status
<input type="checkbox"/> JOHN DOE (EMPLOYEE)	ACTIVE
<input type="checkbox"/> JANE DOE (SPOUSE)	ACTIVE
<input checked="" type="checkbox"/> JOHNNY DOE (CHILD)	ACTIVE
<b>Coverage End Reason *</b>	<b>Coverage End Date *</b>
- SELECT ONE -	MM/DD/YYYY
<input checked="" type="checkbox"/> JANIE DOE (CHILD)	ACTIVE
<b>Coverage End Reason *</b>	<b>Coverage End Date *</b>
- SELECT ONE -	MM/DD/YYYY

[Cancel](#) **Submit**

## NOTE

You also have the option to click the **Terminate** button in the **Dependent Information** box, which allows you to terminate a specific dependent's coverage.

## REINSTATE COVERAGE

The reinstate function is for members being enrolled onto the plan they were on previously. If the member is being reinstated onto a different plan than they were originally covered under, the reinstate function in eServices should NOT be used. In these cases, the member should be re-enrolled in the new plan after you have confirmed termination from the previous one.

- Clicking on the **Reinstate** button in the **Employee Information** box allows you to reinstate the employee and/or any of their dependents.

**EMPLOYEE**

[Expand All](#) | [Collapse All](#)

**JOHN DOE (EMPLOYEE)** ACTIVE 09/01/2018

EMPLOYEE INFORMATION	PLANS
<p><b>DEMOGRAPHICS</b></p> <p><b>Employee ID</b> 987654321</p> <p><b>Social Security #</b> *****4321</p> <p><b>Company ID</b></p> <p><b>Gender</b> MALE</p> <p><b>Date of Birth</b> 01/01/1970</p> <p><b>Marital Status</b> MARRIED</p> <p><b>Date of Hire</b> 03/01/2017</p> <p><b>Original Effective Date</b> 09/01/2018</p> <p><b>Coverage End Date</b></p> <p><b>Coverage End Reason</b> TERMINATED EMPLOYMENT</p> <p><b>Department</b> 001-TEST DEPT 1</p> <p><b>Language</b> ENGLISH</p> <p><b>Wait Period</b> NO</p> <p><b>Has Cobra Coverage</b> NO</p>	<p><b>View: <a href="#">Plan Details</a></b></p> <p><input type="checkbox"/> <b>MEDICAL</b> PASSPORT</p> <p><input type="checkbox"/> <b>MEDICARE</b></p> <p><input type="checkbox"/> <b>OTHER INSURANCE</b></p>

**ADDRESS & PHONE**

[Terminate](#) [Reinstate](#)

- Clicking on the **Reinstate** button in the **Dependent Information** box allows you to reinstate the specific dependent's coverage. You may only reinstate a dependent's coverage when the employee is actively enrolled.
  - Check the box by each name that you wish to reinstate.
  - You **MUST** enter the effective date that the coverage is being reinstated. If this is not done, the system will default to the day after the prior coverage ended, which may not be the desired date for reinstatement of coverage.
  - Click **Next**.

Overview | ID Cards | Claims

**Employee and Dependents**

**Reinstate**

1 Select Enrollees | 2 Update Enrollees | 3 Assign Plans | 4 Review & Submit

**EMPLOYEE INFORMATION**

**DIV :** MSP      **Group# :** 11112 - ABC COMPANY

Cancel Next

**REINSTATE** \* Required

Please enter date enrollee is eligible for benefits.

**Reinstate Effective Date \***

Employee / Dependent(s)	Status
<input checked="" type="checkbox"/> JOHN DOE (EMPLOYEE)	ACTIVE
<input type="checkbox"/> JANE DOE (SPOUSE)	ACTIVE

Cancel Next

- Review the demographic information to see if anything needs to be updated, such as the address.
- Click **Next**.

**NOTE**

If reinstating on COBRA coverage, click the box for **Has COBRA Coverage** and select the appropriate event from the drop down box.

- If reinstating on COBRA coverage, select the correct COBRA class code. Contact the Medica Service Center if you are unsure of which class code to use.
- Remember to click **Submit** when you are done.
- The members are now active in the enrollment system. Pharmacy benefits will be available the next day.

**Gender \*** MALE

**Date of Birth \*** 01/01/1970

**Marital Status \*** MARRIED

**Date of Hire \*** 03/01/2017

**Original Effective Date** 09/01/2018

**Department \*** TEST DEPT 1

**Language \*** ENGLISH

**Wait Period \*** NO

Has Cobra coverage

**Cobra Effective Date \***

**COBRA Event \*** TERMINATION OF EMPLOYMENT (NOT MISCONDUCT)

ADDRESS & PHONE

---

**Country** UNITED STATES      **Address Line 1 \*** 12345 TEST WAY      **Address Line 2**

# ID Cards

HOME

You do not need to request an ID card after performing transactions such as New Additions, Name Changes, Dependent Terminations, etc. These transactions automatically generate an ID card.

- To order an ID card, you must first select the member. To review information on selecting a member, go to **Viewing and updating employee and dependent information** on Page 15.
- Click the **ID Cards** tab while viewing a member record.

The screenshot shows the MEDICA Employer eServices interface. At the top, there are navigation links: Alerts (0) & Notifications (0), My Profile, Manage Users, Help, and Log Out. The user is logged in as 'John' and is viewing the 'ABC COMPANY' dashboard. The main content area is for member 'ROBERT J TEST'. The 'ID Cards' tab is highlighted in red. Below the tab, there is a section for 'EMPLOYEE INFORMATION' with fields for 'DIV: MSP' and 'Group #: 11112 - ABC COMPANY'. A 'Print Record' button is visible. To the right, there is a 'Search for Employees' section with a search box and a '+ Add New Employee' button. Below the search section, there is a 'Manage Employees Help' section with links for 'Search for Employees Help', 'Manage Employees Help', and 'Enrollment FAQ'.

- Select a member and click **Request Card**.

The screenshot shows the MEDICA Employer eServices interface. At the top, there are navigation links: Alerts (0) & Notifications (0), My Profile, Manage Users, Help, and Log Out. The user is logged in as 'John' and is viewing the 'ABC COMPANY' dashboard. The main content area is for member 'JOHN DOE'. The 'ID Cards' tab is highlighted in red. Below the tab, there is a section for 'Request Medical ID Cards'. The text reads: 'Select a member and click Request Card to request a Medical ID Card.' Below this text, there are two radio button options: 'JOHN DOE (EMPLOYEE)' (selected) and 'JANE DOE (SPOUSE)'. A 'Request Card' button is highlighted in red at the bottom of the section.

# Invoices

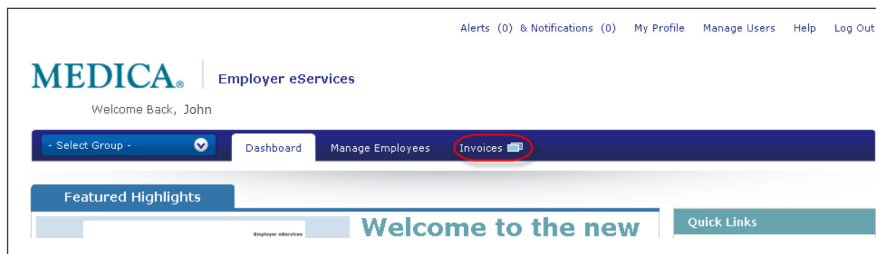
HOME

Employer eServices gives you the option to receive and view your monthly invoices online in the portal. If you select this option, you will no longer receive a paper invoice in the mail. An email will be sent when your invoice becomes available. You will have the ability to view 13 months of invoice history.

Additionally, Employer eServices provides the flexibility to make payments online. If you are interested in this option, please contact the Medica Service Center at 800-936-6880.

## HOW TO VIEW YOUR INVOICE

- Click the **Invoices** tab from the main page.



- You will be brought to a list of invoices going back up to 13 months. Click on the invoice number you want to view.

The screenshot shows the 'Invoices' page. At the top, there are tabs for 'Search', 'Invoice', 'Statement', 'History', and 'Help'. Below this is the 'Invoice List' section. On the left, there is a box with customer information: Billing Customer ID: 337126, Customer Name: ABC COMPANY, Contact Name: JOHN DOE, City: MINNETONKA, State Zip: MN 55305. On the right, there is a 'Policy List' dropdown menu with options: 11111, 11112, and 11113. Below this is a table of invoices with columns: Due Date, Invoice Date, Invoice Number, Invoice Type, Bill Group, Amount Due, and Pay Invoice. A 'Pay Selected Invoices' button is located above the table.

Due Date	Invoice Date	Invoice Number	Invoice Type	Bill Group	Amount Due	Pay Invoice
11/01/18	11/16/18	<a href="#">0044570058</a>	Regular	1	220.00	<input type="checkbox"/>
11/01/18	10/16/18	<a href="#">0044570084</a>	Adjustment	1	937.55	<input type="checkbox"/>
10/01/18	09/14/18	<a href="#">0044415738</a>	Regular	1	220.00	<input type="checkbox"/>
10/01/18	09/14/18	<a href="#">0044415818</a>	Adjustment	1	4,970.00	<input type="checkbox"/>
09/01/18	08/14/18	<a href="#">0044151184</a>	Adjustment	1	130.00	<input type="checkbox"/>
09/01/18	08/14/18	<a href="#">0044151065</a>	Regular	1	130.00	<input type="checkbox"/>
07/14/18	07/14/18	<a href="#">0043974499</a>	Adjustment	1	-29,358.72	<input type="checkbox"/>
07/01/18	06/14/18	<a href="#">0043729925</a>	Regular	1	29,358.72	<input type="checkbox"/>
07/01/18	06/14/18	<a href="#">0043730030</a>	Adjustment	1	1,180.00	<input type="checkbox"/>

**NOTE**

There may be more than one invoice line for a given invoice date. The amount due reflects the total for that specific invoice. By selecting the regular or adjustment line, you will be able to see the whole invoice.

- After selecting an invoice line, you will have the following options:
  - View Invoice:** Displays a PDF of the entire invoice.
  - View Invoice Summary:** Displays a PDF of the summary page(s) of the invoice.
  - View Invoice Spread Sheet:** Downloads an Excel spreadsheet of the invoice.
  - View Remittance Stub:** Displays a PDF of the remittance stub.
  - Request Adjustment Invoice:** Used to recalculate and update the account balance and amount due if enrollment changes were made after the monthly invoice ran.

**MEDICA**

Invoices

Search Invoice Statement History Help [Hide Navigation](#)

**Invoice Summary**

Billing Customer ID: 634102  
 Customer Name: ABC COMPANY  
 Contact Name: JOHN DOE  
 City: MINNETONKA  
 State Zip: MN 55305

[Policy List](#)

Policy Cancel Date
11114

[View Invoice](#)
[View Invoice Summary](#)
[View Invoice Spreadsheet](#)
[View Remittance Stub](#)
[Request Adjustment Invoice](#)

Due Date	Invoice Date	Invoice Number	Invoice Type	Bill Group	Amount Due
12/01/18	11/12/18	0033214147	Regular	1	905.16



## HOW TO PAY YOUR INVOICE ONLINE

There are two ways to pay your invoice online. You can select one or more invoices from the **Main Invoice** by checking the **Pay Invoice** box(es) or select a specific invoice under the **Invoice Number** column.

- From the **Main Invoice** list screen, select the invoices to be paid; then click on **Pay Selected Invoices**. If there is more than one invoice in a month, it is easier to initiate payment from the main invoice list screen by selecting **All Invoices**. If more than one invoice was selected, both invoices will appear on the payment screen.

**Invoices**

Search Invoice Statement History Help Hide Navigation

**Invoice List**

Billing Customer ID: 337126  
 Customer Name: ABC COMPANY  
 Contact Name: JOHN DOE  
 City: MINNETONKA  
 State Zip: MN 55305

Policy List  
 Policy Cancel Date  
 11111  
 11112  
 11113

**Pay Selected Invoices**

Due Date	Invoice Date	Invoice Number	Invoice Type	Bill Group	Amount Due	Pay Invoice
11/01/18	11/16/18	0044570058	Regular	1	220.00	<input type="checkbox"/>
11/01/18	10/16/18	0044570084	Adjustment	1	937.55	<input type="checkbox"/>
10/01/18	09/14/18	0044415738	Regular	1	220.00	<input type="checkbox"/>
10/01/18	09/14/18	0044415818	Adjustment	1	4,970.00	<input type="checkbox"/>

- From the screen for one specific invoice, click on **Pay Invoice**. Payment will only be for that invoice.

**Invoices**

Search Invoice Statement History Help Hide Navigation

**Invoice Summary**

Billing Customer ID: 333245  
 Customer Name: ABC COMPANY  
 Contact Name: JOHN DOE  
 City: NEW BRIGHTON  
 State Zip: MN 55112

Policy List  
 Policy Cancel Date  
 11111  
 11112

**View Invoice View Invoice Summary View Invoice Spreadsheet View Remittance Stub Request Adjustment Invoice Pay Invoice**

Due Date	Invoice Date	Invoice Number	Invoice Type	Bill Group	Amount Due
12/01/18	11/12/18	0033352262	Regular	1	220.00

- Once you have confirmed the payment amount, click on **Submit Payment**.

**Invoices**

Search Invoice Statement History Help Hide Navigation

**Invoice Payment**

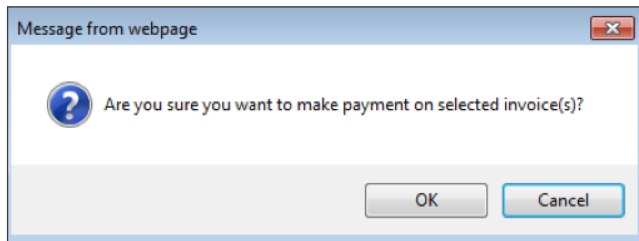
Billing Customer ID: 333245  
 Customer Name: ABC COMPANY  
 Contact Name: JOHN DOE  
 City: NEW BRIGHTON  
 State Zip: MN 55112

Policy List  
 Policy Cancel Date  
 11111  
 11112

Due Date	Invoice Date	Invoice Number	Invoice Type	Bill Group	Amount Due	Payment Amount	Pay Invoice
12/01/18	11/12/18	0033352262	Regular	1	220.00	220.00	<input checked="" type="checkbox"/>
11/01/18	10/15/18	0032935167	Regular	1	220.00	220.00	<input checked="" type="checkbox"/>
<b>Total :</b>					<b>440.00</b>	<b>440.00</b>	

**Cancel Recalculate Payment Submit Payment**

- A box to confirm payment will appear.



- Details of the payment transaction are available by clicking on the **History** tab on the navigation bar above.

Event Date/Time	Online Activity Description
12/22/18 11:28:55 am CT	FirstName LastName requested an adjustment invoice
12/22/18 10:28:55 am CT	FirstName LastName requested a payment for statement S1000 for \$1000.00
12/22/18 10:00:55 am CT	FirstName LastName requested a payment for invoice(s) 000011111 for \$500.00 and 000022222 for \$1000.00. Total payment requested \$1500.00.

# Managing Your Enrollment During Renewal

HOME

During your open enrollment period, you will utilize many of the transactions you have become familiar with throughout the year. This section will provide a brief outline of how to complete different types of open enrollment scenarios. For the more detailed process steps and tips, refer back to previous sections of this guide.

## ENROLLEES WHO ARE TERMING COVERAGE

- Search for the employee who is terminating coverage.
- Click the **Terminate** button in the **Employee Information** box.
- Enter the termination date.
- Select the termination reason (in this case, the reason would be open enrollment termination).
- Click **Submit**.

## ENROLLEES WHO ARE KEEPING THEIR SAME BENEFIT PLAN

- No action needed. These enrollees will continue as is into the next plan year.

## ENROLLEES WHO ARE KEEPING THEIR SAME BENEFIT PLAN BUT ARE MAKING OTHER CHANGES

(ex. address, Primary Care Clinic, adding/dropping dependents)

- Search for the employee.
- Click on the employee name.
- Click **Edit** in the **Employee Information** section to update an item such as the address.
- Click **Edit** in the **Plans** section to update the Primary Care Clinic.
- Click **Add a Dependent** to add a dependent to the employee's benefit plan.
- Click the **Terminate** button to end the coverage for a dependent. To terminate multiple dependents at once, click the **Terminate** button under the employee and then select those dependents you wish to end coverage for. Be sure not to select the actual employee.

### NOTE

Keep in mind that adding or terming dependents may require that employee's billing class code to be updated as well. To do this you will need to edit this item in the **Plans** section for the enrollee.

## ENROLLEES WHO ARE CHANGING BENEFIT PLANS

You must first terminate the enrollee from the current plan before enrolling them in their new benefit plan.

- Search for the employee who is terminating coverage.
- Click on the **Terminate** button in the **Employee Information** box.
- Enter the termination date.
- Select the termination reason (in this case, the reason would be open enrollment termination).
- Click **Submit**.
- Then enroll the person in their new benefit plan. This is done either through **Reinstatement** or **Add New Employee**.
  - **Reinstatement:** For employees previously covered under the same plan/group number and have selected that same plan again.
  - **Add New Employee:** For employees not previously covered under the plan they have now selected.

### TO REINSTATE COVERAGE

- Select the appropriate group number.
- Search for the enrollee's name.
- Click the **Reinstate** button in the employee information box.
- Update the effective date to the desired effective date.
- Click **Next** and proceed with reviewing and editing required information.
- At the end, click **Submit**.

### TO ADD NEW EMPLOYEE

- Select the appropriate group number.
- Click the **Add New Employee** button. Proceed with adding required data to complete the enrollment.
- At the end, click **Submit**.

# Managing the Users Within Your Organization

HOME

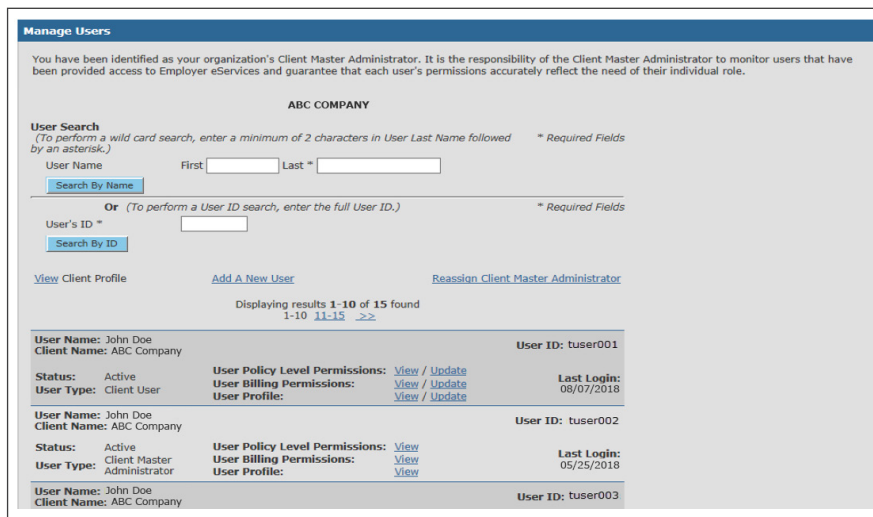
Any changes to the individuals who have access to the eServices portal must be made by the **Client Master Administer** at your group. This role is able to add or inactivate users or change the permission level of users.

- To access this function, click the **Manage Users** link in the upper right portion of the screen.



## UPDATING AN EXISTING USER

- Locate the user from the list and click the **Update** link next to the permission level that will be updated (Policy Level or Billing).



- Select or deselect the permission levels next to each policy number. Once the updates have been made, click the **Submit** button.

Individual permission levels can be updated by clicking the check box, or all permission for a given policy number can be selected or deselected at once using the on/off feature.

*Example of the Policy Level Permissions update screen*

**Manage Users**

You have been identified as your organization's Client Master Administrator. It is the responsibility of the Client Master Administrator to monitor users that have been provided access to Employer eServices and guarantee that each user's permissions accurately reflect the need of their individual role.

**Test Group**  
Update Policy Level Permissions For **John Doe**

Search by Policy/DivGroup     
(To perform a wild card search, enter a minimum of 2 characters followed by an asterisk.)

All Perms On/Off	Platform	Policy/DivGroup	Customer No. / Master Grp	Eligibility Update / Request ID Card	Eligibility Inquire	Elig Electronic Files	Chain View	Billing	Reporting	Banking
<input type="checkbox"/> On <input type="checkbox"/> Off	COSMOS	MSP11111	133648	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> On <input type="checkbox"/> Off	COSMOS	MSP11112	137361	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> On <input type="checkbox"/> Off	COSMOS	MSP11113	137361	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> On <input type="checkbox"/> Off	COSMOS	MSP11114	137361	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> On <input type="checkbox"/> Off	COSMOS	MSP11115	146229	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> On <input type="checkbox"/> Off	COSMOS	MTK11111	300001	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> On <input type="checkbox"/> Off	COSMOS	MTK11112	300001	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> On <input type="checkbox"/> Off	COSMOS	MTK11113	300001	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> On <input type="checkbox"/> Off	COSMOS	MTK11116	300004	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

*Example of the Billing Permissions update screen*

**Manage Users**

You have been identified as your organization's Client Master Administrator. It is the responsibility of the Client Master Administrator to monitor users that have been provided access to Employer eServices and guarantee that each user's permissions accurately reflect the need of their individual role.

**Test Group**  
Update Billing Permissions for **John Doe**

Search By Customer/Account No., Bill group or Customer/Account No.-Bill Group combination  
(example: 1234567 or 1234567-2)

-

All Perms On/Off	Customer /Account No.	Customer Name	Bill Group Number	View Invoices	Pay Invoices
<input type="checkbox"/> On <input type="checkbox"/> Off			MSP-133648	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> On <input type="checkbox"/> Off			MSP-137361	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> On <input type="checkbox"/> Off			MSP-146229	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> On <input type="checkbox"/> Off			MTK-300001	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> On <input type="checkbox"/> Off			MTK-300004	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## ADDING A NEW USER

- Click the **Add a New User** link.

**Manage Users**

You have been identified as your organization's Client Master Administrator. It is the responsibility of the Client Master Administrator to monitor users that have been provided access to Employer eServices and guarantee that each user's permissions accurately reflect the need of their individual role.

**ABC COMPANY**

**User Search**  
(To perform a wild card search, enter a minimum of 2 characters in User Last Name followed by an asterisk.) \* Required Fields

User Name First  Last

[Search By Name](#)

Or (To perform a User ID search, enter the full User ID.) \* Required Fields

User's ID

[Search By ID](#)

[View Client Profile](#) [Add A New User](#) [Reassign Client Master Administrator](#)

Displaying results 1-10 of 15 found  
1-10 [11-15](#) [>>](#)

<b>User Name:</b> John Doe <b>Client Name:</b> ABC Company	<b>User ID:</b> tuser001
<b>Status:</b> Active <b>User Type:</b> Client User	<b>User Policy Level Permissions:</b> <a href="#">View / Update</a> <b>User Billing Permissions:</b> <a href="#">View / Update</a> <b>User Profile:</b> <a href="#">View / Update</a>
<b>User Name:</b> John Doe <b>Client Name:</b> ABC Company	<b>User ID:</b> tuser002
<b>Status:</b> Active <b>User Type:</b> Client Master Administrator	<b>User Policy Level Permissions:</b> <a href="#">View</a> <b>User Billing Permissions:</b> <a href="#">View</a> <b>User Profile:</b> <a href="#">View</a>
<b>User Name:</b> John Doe <b>Client Name:</b> ABC Company	<b>User ID:</b> tuser003

- Complete the information about the new user and click the **Submit & Continue** button. Selecting **Yes** under **Inherit Permissions** will give the new user the exact same permissions that you have. If you would rather manually select only certain permissions, select **No**.

**Manage Users**

You have been identified as your organization's Client Master Administrator. It is the responsibility of the Client Master Administrator to monitor users that have been provided access to Employer eServices and guarantee that each user's permissions accurately reflect the need of their individual role.

**Create User Profile For: ABC Company**

Please enter the requested information below to create a new User. \* Required Fields  
On the next page you can assign permissions for this user.

The Manage Access function should be used only to add individuals employed by your company. The function should not be used to add Consultants, Brokers, etc. Brokers should work with their Account Representative for access.

**User Information**

User Type\* Client User

First Name

Middle Initial

Last Name

Street Address 1

Street Address 2

Mail Route

City

State

Zip Code  -

Phone Number  (  )  -  ext.

Email

Role

Department

Status

Reporting  Yes  No

Reporting Level

Access  Non-Confidential  Confidential

Inherit Permissions  Yes  No

[Submit & Continue](#) [Cancel](#)

## TERMINATING A USER

- Click the **Update** link next to **User Profile**.
- Change the **Status** to **Inactive** and click the **Submit** button.

**User Name:** John Doe  
**Client Name:** ABC Company

**User ID:** tuser001

**Status:** Active  
**User Type:** Client User

**User Policy Level Permissions:** [View / Update](#)  
**User Billing Permissions:** [View / Update](#)  
**User Profile:** [View / Update](#)

**Last Login:** 08/07/2018

A banner image showing a person's hands typing on a laptop keyboard, overlaid with a teal gradient. The text "Employee eServices FAQ" is written in large white font across the center.

# Employee eServices FAQ

[HOME](#)

## Q. Can you search for a Primary Care Clinic (PCC) by the 11-digit PCC number?

A. The search is a name search. The best way to search is to select Primary Care Clinic from the **Provider Type** drop down and then enter the first word in the clinic name followed by an asterisk (\*).

## Q. Is there a place to change someone's plan in eServices?

A. To change someone's plan, you will terminate their coverage in the current group number, then switch group numbers in the **Select Group** drop down and re-enter their information under the new group number (plan).

## Q. Is there a way to search for an employee without selecting the group number first?

A. No, to find an employee you must first know the group number they are in and select that from the drop down.

## Q. What is the waiting period field used for?

A. This field is used when enrolling a newly hired employee who had a waiting period before he/she became eligible for coverage.

## Q. Can you enroll a dependent with a different address than the employee?

A. Yes, there is a box that says "Address & phone is different than the employee." Click this and enter the address of the dependent.

## Q. Does the eServices site know what our eligibility rules are and create an error or edit if we enter a new employee with an effective date that does not match our rules?

A. No, there are no edits in eServices for eligibility rules.

## Q. If we don't have a dependent's SSN, should we enter all 9s?

A. No, please leave the field blank if you do not have a dependent's SSN. We recommend adding the SSN when it becomes available.

## Q. How do you change the class code when adding or terminating a dependent?

A. Once the transaction to add or term the dependent is completed, go back to the employee record and click **Edit** in the **Plans** section. From there you will be prompted to select an effective date for the change and then the class code drop down will appear and the code can be updated. If the dependent was added effective 3/1/18, select 3/1/18 as the effective date when updating the class code. If the dependent was terminated 4/30/18, select 5/1/18 as the effective date when updating the class code.

## Q. Where can I see our departments on the invoice?

A. To view the departments, click on **View Invoice Spreadsheet**. This will open a spreadsheet version of your invoice and the department codes will be in the column named **Customer Defined Sort**.