Harvard Pilgrim Health Care

# The Employer Account

*User's Guide*

# Copyright

# Contents

# Overview

This User's Guide explains how to use the *Employer Account* to manage Subscribers and their Dependents enrolled in a Harvard Pilgrim Health Care plan.

**How to...**



From the *Employer Account* home page, you can also access these systems and information:

# Working with the *Employer Account*

## Selecting an Employer

If you are a user who has AdminPlus or StandardPlus access to more than one Employer ID, when you log into the *Employer Account* you will see only the **Select Employer** function. You must select an employer before you see all your allowed functions in the left menu. Any actions that you perform will be for the selected employer, until you select another employer.

If you are a user who has access to only one Employer ID, when you log into the *Employer Account* you will immediately see the Welcome page with all your allowed functions in the left menu. You will not see the Select Employer function.

### To select an employer

1. In the left menu, click **Select Employer**. The Select Employer page appears.
2. Select the **Employer Name** from the list. If necessary, click Clear to clear the Employer Name field.
3. Click **Save Selection**.
4. Click **OK** in the pop-up message. The functions in the left menu now pertain to the selected employer, whose name appears in parentheses at the top of the page.

### To select another employer

1. In the left menu, click **Select Another Employer**. The Select Employer page appears.
2. Select another **Employer Name** from the list. If necessary, click **Clear** to clear the Employer Name field.
3. Click **Save Selection**.
4. Click **OK** in the pop-up message. The functions in the left menu now pertain to the selected employer, whose name appears in parentheses at the top of the page.

## Adding or Re-Enrolling a Subscriber

You can enroll or re-enroll a Subscriber and their dependents in a Harvard Pilgrim Health Care plan using the instructions below.

* A red asterisk indicates a required field.

**Note:** Clicking **Cancel** within this process cancels any changes made and takes you back to the first page (Effective Date/Change Reason).

### To add or re-enroll a Subscriber

1. Click **Add/Re-Enroll Subscriber** in the *Employers Account* left menu. The **Add/Re-Enroll Subscriber** page appears.

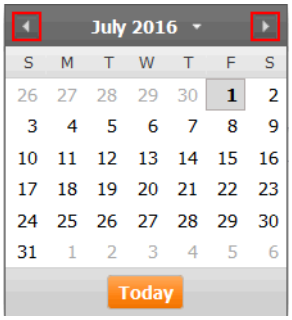
**2** Type the **Effective Date** (the date on which an insurance binder or policy goes into effect) in an mm/dd/yyyy format or click the calendar icon to select the date.

**Note1:** You can only enter an effective date within your allowable retro period (generally 60 days). Dates that cannot be selected are grayed out.

**Note2:** You can enter dates in the *Employer Account* by:

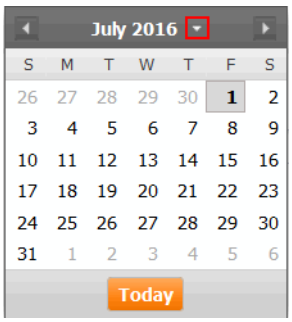
- Typing the date in the field using an mm/dd/yyyy format, or
- Clicking the calendar icon. Then:

  **i** Click the left and right arrows to change the calendar forward and back one month at a time. Then click the day.

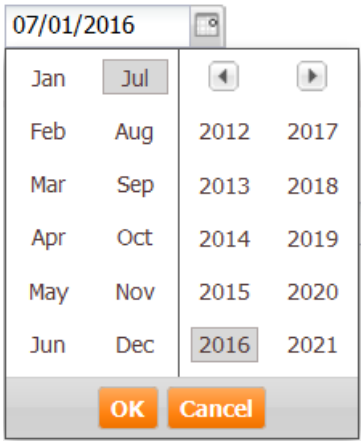



Or...

  **i** Click the down arrow.




  **ii** Select the month and year. Click the left and right arrows to move the years forward and back 10 years at a time.



iii After selecting the month and date, click **OK**. Then select the day.

3 Click a **Change Reason** * for the new enrollment in the list.

4 Click **Next**.

5 Click a **Plan Category** * in the list. The plan's Medical ID, Prescription ID, and Customer Acct # appear for your verification.

6 Click a **Plan Option** * in the list.

7 Click **Next**.

**Note:** If you selected a Medicare Enhance Category and Plan Option, you must complete step 8.

8 Select the **Medicare Plan Code** *.

a Enter Hospital (Part A) * – The effective date that appears on the subscriber's Medicare Card.

b Enter Medical (Part B) * – The effective date that appears on the subscriber's Medicare Card.

c Enter Medicare Claim Number * – The Medicare beneficiary's assigned number.

9 Click **Next**.

**Note:** Medicare Enhance is for individual subscribers ONLY. Any dependents on the existing policy will be terminated as of the day prior to enrollment in Medicare Enhance.

10 Enter the identifying **Subscriber Information**, and then click **Next**. First Name and Last Name fields each have a limit of 25 characters.

**Note:** If the person had a Harvard Pilgrim policy through your company in the last five years, the information for the subscriber and their formerly enrolled dependents will appear on the next page, where you can make changes as needed.

11 The identifying Subscriber information is prefilled and highlighted. Enter or update the remaining Subscriber information and any Dependent information, and then click **Next**.

- To remove a formerly enrolled dependent, click **Remove Dependent**.

**Note1:** Please read the following information if you are adding an **adult disabled dependent**.

*To qualify as an adult disabled dependent, the person must be an unmarried child of the subscriber or spouse of the subscriber (including an adopted child), who is beyond the dependent child age limit of the group and meets each of the requirements: currently disabled; was disabled before his/her 26th birthday; lives with the subscriber or spouse; and remains financially dependent on the subscriber.*

*Coverage for an adult disabled dependent requires prior approval from Harvard Pilgrim. To begin this process, download the Member Authorization to Obtain Protected Health Information Form* (https://www.harvardpilgrim.org/pls/portal/docs/page/members/member_forms/adultdisabledependent.pdf*). Print the form and give it to the dependent's physician. After the physician completes the form, mail both the subscriber form and physician form to the Harvard Pilgrim address located on the form.*

*Upon receipt and review of the forms, Harvard Pilgrim will notify you in writing of the determination of the dependent's eligibility.*

*If you need assistance, call Account Services at 800-637-4751 8 a.m. – 5 p.m. Monday through Friday.*

**Note2:** For some employers, you cannot choose Life Partner as the Relation to Subscriber if the gender of the subscriber and the dependent are the same.

**12** Select a PCP (Primary Care Physician) for one or more members:

**Note:** PCP is required for HMO and POS plans.

**a** Click **Select PCP** next to the member's name in the **Action** column. The **Select a PCP** page appears.

**b** Enter the Provider search criteria, and then click **Search**. You must enter at least one of the following search criteria:

- Provider Last Name
- City
- ZIP Code
- Gender
- Provider First Name
- State
- Provider ID
- Accepting New Patients – Select the **Yes** check box.

**c** A list of PCPs that match your search criteria appears in the Providers list below the search criteria. Select the check box in the **Select PCP** column next to the Provider whom you want to assign as the Primary Care Physician. The PCP name appears next to the member's name in the members PCP list.

- To assign a PCP who is currently selected for one member to everyone in the members PCP list, click **Assign to All** next to the member's name in the Action column.
- To change a member's PCP, click **Change PCP** next to the member's name in the **Action** column.

**13** Click **Next**. The Enrollment Summary appears.

**14** Review the information you have entered. To change an item, click **Edit** in the section and make the changes. Then click **Next** to return to the Enrollment Summary.

**15** When finished, click **Submit**. The following important information appears at the top of the page:

- Tracking Number
- Policy Number

**Important:** The transaction is not complete until you click **Submit**. Write down or save/print your **Tracking Number** and **Policy Number** by clicking **Print**.

**16** Optionally, click **Print** to save and/or print the transaction information to a PDF file.

# Editing a Subscriber or Dependent

You can edit a Subscriber, add or edit a Dependent, edit a PCP, and edit the Plan Options using these instructions.

### To edit a Subscriber or their dependent

1. Click **Edit/Term Subscriber** in the *Employer Account* left menu. The Search page appears.
2. Enter the following search criteria for the Subscriber whom you want to edit. You can enter a partial or the complete spelling in the First Name and Last Name fields:
   - First Name
   - Last Name
   - Social Security #
3. Click **Search**. The name that meets your search criteria appears in the list.
4. Click **Open** in the **Action** column next to the Subscriber's name or double-click the Subscriber's line. The **Enrollment Summary** page for the Subscriber appears.
5. Click an Edit button (for example, **Edit Subscriber**, **Edit PCP**, **Edit Plan Options**, **Edit Dependent**) in each section that you want to edit.

   Make the changes and then click **Next**.

   **Note:** Click **Cancel** to cancel any changes made. The system then returns you to the member's **Enrollment Summary** page.
6. Repeat steps 5 and 6 for each section that you need to change.

### To add a dependent

**Important:** If a Subscriber has or had a spouse on their policy, even if that spouse was disenrolled, you cannot add a new spouse to the current policy unless it is the originally enrolled spouse.

If you want to add a NEW spouse, you have to terminate the Subscriber's existing policy on which the old spouse/ex-spouse was a dependent. You can do so using the Edit/Term Subscriber function (see page 14) **Terminate Contract** button. Then, you need to create a new policy for the Subscriber, (new) spouse, and any other dependents using the Add/Re-Enroll Subscriber function.

1. Click **Add Dependent** on the Enrollment Summary page.
2. Type the Effective Date (the date on which an insurance binder or policy goes into effect) in a mm/dd/yyyy format or click the calendar icon to select the date. See page 7 for detailed instructions on entering dates.

   **Note:** You can only enter an effective date within your allowable retro period (generally 60 days). Dates that cannot be selected are grayed out.
3. Click a **Change Reason** for adding the dependent, and then click **Next**.

4. If there were any formerly enrolled dependents on this Subscriber's policy, they appear in a Dependents list in a pop-up window.
   - Select the dependent(s) to add, and then click **Next**.
   - If you do not want to add any dependents in the list, click **Cancel**.
   - To add a new dependent, who is not in the list, click **Add New Dependent**.
5. Enter or update the dependent information, and then click **Next**.
6. To add more dependents, click **Add Dependent** on the Enrollment Summary page.

#### To terminate a Dependent

- Click **Terminate Dependent** at the bottom of the Dependent Profile section of the page.

#### To terminate the Subscriber

- Click **Terminate Contract** at the bottom of the page.

#### To close the Subscriber's tab

- Click the small  in the top-right corner of the tab.

## Searching Subscribers

You can easily search for a subscriber whose information you would like to edit. You will generate more search results by entering fewer search criteria. For example, if you enter only the letters “Jo” in the Last Name field, all subscribers whose last names begin with “Jo” will appear in the results.

#### To search for a Subscriber

1. Click **Search Subscribers** in the *Employers Acoount's* left menu. The **Subscriber Management** page appears.

   **Note:** You can also search by clicking **Edit/Term Subscriber** in the left menu, or clicking **Manage Rosters** in the left menu and then clicking **Active Subscribers**.
2. Enter one or more of the following search criteria, or leave all fields blank to display all Subscribers. You can enter a partial or the complete spelling in the First Name and Last Name fields:
   - First Name
   - Last Name
   - Social Security #
3. Click **Search**. The names that meet your search criteria appear in the list.

#### To view or edit information about a Subscriber in the search results list

- Click **Open** in the Action column next to the Subscriber's name or double-click the Subscriber's row. The Enrollment Summary page for the Subscriber appears. You can then edit the information (see page 10) or terminate the Subscriber.

#### To order an ID card for a Subscriber in the search results list

- Click **Order ID Card** next to the Subscriber's name in the Action column. The **ID Cards** tab for the Subscriber appears. You can order ID cards or print temporary cards (see page 42) for the Subscriber and/or their dependents.

## Selecting a PCP

When adding a Subscriber or dependent to an HMO or POS plan, you are required to specify a PCP for each member on the contract.

#### To select a PCP

1. Do one of the following:
   - Click **Add/Re-Enroll Subscriber** in the *Employers Account* left menu to add a new Subscriber.

   or

   - Click **Edit/Term Subscribers** in the left menu to edit a Subscriber.
2. Click **Select PCP** next to the member's name in the Action column. The Select a PCP page appears.
3. Enter Provider search criteria and click **Search**. The following is a list of criteria.
   - Provider Last Name
   - Provider First Name
   - City
   - State
   - ZIP Code
   - Gender – Select Male, Female, or blank (all) from the drop-down list.
   - Provider ID
   - Specialty
   - Secondary Language
   - Accepting New Patients

   A list of PCPs that match you search criteria appears in the list below.

4. Select the check box in the Select PCP column. The new Provider appears in the PCP Name column for the member.
   - To assign a PCP, who is currently selected for one member to everyone on the list, click **Assign to All** in the Action column next to the member's name.
   - To change a member's PCP, click **Change PCP** in the Action column next to the member's name or double click the member's line.
5. Click **Next**. The Enrollment Summary page appears.

## Ordering ID Cards

You can order a replacement member ID card and/or print a temporary card using these instructions.

**Note1:** You do not need to request a new member ID card when you change the plan, change the Subscriber's name, or add a dependent. A new member ID card will be sent to the member automatically.

**Note 2:** Harvard Pilgrim Health Care no longer lists the Primary Care Physician's name and number on its ID cards, so it is not necessary to order a card if you have changed the Primary Care Physician.

**Important:** The member ID card will be mailed to the address that appears on the Order ID Cards page. If the mailing address for the plan is not correct, update the address before ordering card(s). If ordering a card for a dependent with a different address, their card will be sent to the address on file. Allow 7-10 days to receive the card(s).

### To order an ID card

1. On the *Employer Account* home page, click **Search Subscribers** in the left menu. The **Subscriber Management** page appears.
2. Search for the person for whom you want to order an ID card.
3. Click **Order ID Card** next to the Subscriber's name in the **Action** column. The **ID Cards** tab for the Subscriber appears.
4. To order a card:
   a. Select the check box for the Subscriber and any dependents if necessary.
   b. Click **Order ID Cards** to submit the order.

   Or...

   - Click **Print Temporary Cards** to print a letter that serves as a temporary Harvard Pilgrim ID card.

**Note:** You need Adobe Reader installed on your system to display and print the temporary card letter.

# Terminating a Subscriber or Dependent

You can terminate a Subscriber (their contract) or remove a Subscriber's Dependent from the contract using these instructions.

### To terminate a Subscriber

1. Click **Edit/Term Subscribers** in the *Employers Connect* left menu. The **Search** page appears.
2. Enter the following search criteria for the Subscriber whose contract you want to terminate, or leave all fields blank to display all Subscribers:
   - First Name
   - Last Name
   - Social Security #
3. Click **Search**. The name that meets your search criteria appears in the list.
4. Click **Open** next to the Subscriber's name in the **Action** column. The Enrollment Summary page for the Subscriber appears.
5. Click **Terminate Contract**.

### To terminate a Dependent

- Scroll down the page to the Dependent Profile that you want to remove from the Subscriber's contract and click **Terminate Dependent**.

# Managing Changes Pending Approval

## Managing Changes Pending Approval

To ensure accurate and timely processing of changes, you can set a preference (see page 31) in the *Employer Account* to require review and approval of any enrollment changes that your employees initiate. This topic explains how to manage a new or existing Subscriber's pending change(s).

### To approve, deny, or hold a new or existing Subscriber's pending change(s)

1. Click **Changes Pending Approval** in the *Employer Account* left menu. The **Changes Pending Approval Roster** appears.
2. Click **Open** in the **Action** column next to the Subscriber's name or double-click the Subscriber's line for whom you want to approve or deny. The **Enrollment Summary** page for the Subscriber appears.
3. If necessary, click **Edit** in the Pending Changes section to edit the change. For example, to correct the Effective Date. Make the change(s) and click **Next**. The Roster appears.
4. At the bottom of the Roster page, click **Approve Transaction**, **Deny Transaction**, or **Cancel**.

- **Approve Transaction** sends the transaction to Harvard Pilgrim Health Care. When you approve a transaction, you verify an employee's eligibility. In some situations, Harvard Pilgrim Health Care may need to work with you to ensure the validity of the information you provided.
- **Deny Transaction** cancels the transaction. It does not go to Harvard Pilgrim Health Care. You must choose a reason when you deny a transaction. The reason will appear on your Denied Transactions roster.
- **Cancel** exits the page leaving the changes pending approval on hold awaiting future approval or denial.

## Managing Changes Pending Approval Within Subscriber Management

To ensure accurate and timely processing of changes, you can set a preference in the *Employer Account* to require review and approval of any enrollment changes that your employees initiate. Pending changes for enrolled Subscribers can be approved and denied within the Subscriber Management Enrollment Summary. For pending changes for new (unenrolled) Subscribers, go to Managing Changes Pending Approval (see page 14).

### To approve, deny, or hold an enrolled Subscriber's pending change(s) within Subscriber Management

1. Click **Edit/Term Subscriber** in the *Employers Account* left menu. The **Subscriber Management** page appears.
2. Enter the following search criteria for the Subscriber for which you want to approve or deny:
   - First Name
   - Last Name
   - Social Security #
3. Click **Search**. The name that meets your search criteria appears in the Subscribers list. The Subscriber's change that must be approved or denied is listed in the Change Type column.
4. Click **Open** in the **Action** column next to the Subscriber's name or double-click the Subscriber's line for whom you want to approve or deny. The **Enrollment Summary** page for the Subscriber appears.
5. If necessary, click **Edit** in the Pending Changes section to edit the change. For example, to correct the Effective Date. Make the change(s) and click **Next**. The **Roster** appears.
6. At the bottom of the page, click **Approve Transaction**, **Deny Transaction**, or **Cancel**.
   - **Approve Transaction** sends the transaction to Harvard Pilgrim Health Care. When you approve a transaction, you verify an employee's eligibility. In some situations, Harvard Pilgrim Health Care may need to work with you to ensure the validity of the information you provided.
   - **Deny Transaction** cancels the transaction. It does not go to Harvard Pilgrim Health Care. You must choose a reason when you deny a transaction. The reason will appear on your Denied Transactions roster.

- **Cancel** exits the page leaving the changes pending approval on hold awaiting future approval or denial.

# Managing Rosters

## Managing Rosters Online

### To select a roster for which to add, edit, or terminate members, and order ID cards

1. Click **Manage Rosters** in the *Employer Account* left menu. The **Manage Roster** page appears.
2. Click **Active Subscribers**. The **Subscriber Management** page appears, where you can perform the following tasks:
   - Open a Subscriber's enrollment summary (see page 10).
   - Order ID Cards (see page 13).

### To approve, deny, or hold a Subscriber's pending change(s)

1. Click **Manage Rosters** in the *Employers Account* left menu. The **Manage Roster** page appears. This list contains any changes you or the employee has made on the contract that have yet to be processed by Harvard Pilgrim.
2. Click **Changes Pending Approval**. The **Changes Pending Approval Roster** page appears, where you can perform the following tasks:
   - Open a Subscriber's enrollment summary (see page 10) and then manage their changes pending approval (see page 14).

## Downloading a Roster

You can generate rosters online for active Subscribers and changes pending approval or download rosters to a comma-separated value file (.csv). The following information is contained in the Active Roster file.

- Member ID Number
- Subscriber's SSN
- First Name
- Last Name
- Date Of Birth
- Age
- Relation to Subscriber
- Selection Category
- Contract Type
- Product Address Line 1
- Address Line 2
- City
- State
- Country Zip
- Home Phone
- Gender
- Customer Account
- Work Phone
- PCP Number

#### To download a roster

1. Click **Manage Rosters** in the *Employer Account* left menu. The **Manage Roster** page appears.
2. Click the **Download Roster** tab.
3. Click a **Download Type**. Choices include:
   - Subscriber Only
   - Subscriber and Dependents
4. Click a **Roster Type**. Choices include:
   - Active Subscribers On – Enter a date. Type the date in a mm/dd/yyyy format or click the calendar icon to select the date. See page 7 for detailed instructions on entering dates.
   - Changes Pending Approval
   - Changes Denied
5. To complete the roster download, do one of the following.
   - Click **Download All Accounts** to download rosters for all Customer Accounts to a comma-separated value file (.csv).
   - Select one or more Customer Accounts in the list, then click **Download Selected Accounts** to download rosters for the selected Customer Accounts to a comma-separated value file (.csv).
6. Click **Save** at the prompt and save the roster file to your computer.

## Viewing Reports

You can view and download reports in comma-separated value format (.csv) and, in some cases, Adobe Reader format (.pdf) also.

You begin by selecting the report that you want to view and then entering the report parameters to generate the report.

### Viewing the Dependent Termination Report

The Dependent Termination Report lists the dependents in the selected Customer Account(s) who were terminated within the specified date range. You can narrow the report's results by entering a Policy Number, Dependent Name, and/or Subscriber Social Security Number.

#### To view the Dependent Termination Report

1. Click **View Reports** in the *Employer Account* left menu. The **Select a Report** page appears.
2. Click **Dependent Termination Report**. The **Generate Report** page appears.
3. Type or select a **Report Start Date** and **Report End Date** within the last 6 months.

4. Enter any additional report parameters to narrow the report's results.
5. Optionally, select the check boxes next to the **Customer Account(s)** for which you want to generate a report. If you do not select a Customer Account(s), a report for each account is generated.
6. Click **Generate Report**. The resulting report(s) appear in the list below the report parameters.
7. To save a report in Adobe Reader (.pdf) format or comma-separated value (.csv) format, click the corresponding button in the **Download** column, and then click **Save** at the prompt.

   **Important:** When downloading a .csv file, do not click Open at the prompt if Microsoft Excel is your default application, because Excel will automatically remove the leading zeros in the .csv file's numeric fields.

## Downloading the Member SSN Change Report

The Member SSN Change Report lists the active and terminated members in the selected Customer Account(s) whose Social Security Number changed within the specified date range, regardless of the method used to make the change (Employer Account application, EDI, phone, letter).

**Note:** If a member changed Customer Accounts, the member will appear in the report under the Customer Account in which they were located at the time the SSN change took place.

### To download the Member SSN Change Report

1. Click **View Reports** in the *Employer Account* left menu. The Select a Report page appears.
2. Click **Member SSN Change Report**. The Generate Report page appears.
3. Type or select a **Report Start Date** and **Report End Date** within the last 6 months. By

   default, the prior 30 days are selected. If you change the date range, click **Show Customer Accounts** to refresh the Customer Accounts list.
4. Do one of the following:
   a. To download a report for all Customer Accounts, click **Download All Accounts**.
   b. To download a report for selected Customer Accounts, select the check box next to one or more Customer Accounts, and then click **Download Selected Accounts**.

   **Note:** You cannot multi-select more than 88 Customer Accounts. If you want to report on more than 88 Customer Accounts, you need to use the **Download All Accounts** button.
5. Click **Save** at the prompt to save the report as a comma-separated value file (.csv). The Employer ID is appended to the file name.

   **Important:** Do not click **Open** at the prompt if Microsoft Excel is your default application, because Excel will automatically remove the leading zeros in the .csv file's numeric fields.

# Updating Logo and E-Mail Addresses

## Uploading or Removing a Logo

You can personalize and co-brand the *Employer Acount* and the *Member Account* web applications by uploading your company's logo file. The logo area is 68 pixels high x 210 pixels wide. If your logo is larger, it will be scaled to fit; if it is smaller, it will remain as uploaded.

### To upload your company's logo

1. Click **Update Logo/E-mail Addresses** in the *Employer Account* left menu.
2. Click **Browse** to find and select a logo file to upload (.jpg or .gif file format only).
3. Click **Upload Logo**. The uploaded logo appears in the upper-right corner of the page.

### To remove your company's logo

1. Click **Update Logo/E-mail Addresses** in the *Employer Account* left menu.
2. Click **Remove Logo**. The company logo is removed from the upper right corner of the page.

## Updating E-Mail Addresses

Enter the e-mail address(es) of the people, including Brokers, who will be notified every 3 days when there are Employee transactions awaiting approval for your account.

### To update an e-mail address

1. On the *Employer Account* home page, click **Update Logo/E-Mail Addresses** in the left menu.
2. Click the **Update E-Mail Addresses** tab.
3. Type in the e-mail address. To enter multiple e-mail addresses, separate each address with semicolon (;), for example JohnSmith@domain.com;JaneDoe@domain.com.
4. Click **Update**.

# Changing Passwords

Your user Password must be a minimum of eight alphanumeric characters with at least one numeric character. Do not use a password that contains your first name, last name, username, company name, or a common dictionary word. It cannot be a password that you have used in the past two years.

### To change a password

1. Click **Change Password** in the *Employer Account* left menu. The **Change Password** page appears.
2. Type your current password.

3. Type a new password.
4. Re-type the new password.
5. Click **Change Password** or click **Clear** to clear the fields.

## Viewing Benefits Information

You can view a specific Schedule or Summary of Benefits (SOB), Handbook, or other plan documents that your company offers.

**Note:** The Schedule of Benefits is effective on the day you view it. It is subject to change due to federal and state mandates.

#### To view benefits information

1. Click **View Benefits Information** in the *Employer Account* left menu.
2. Locate the customer and product in the list, and then click **Open** in the Plan Documents column.

   **Tip:** Click a column heading to sort the list by that column. Click the heading again to reverse the sorting order.

After you open a document, you can view it, save it to your computer, or print it.

## Accessing Express Enrollment

### Using Express Enrollment

**Important:** If you have been set up for EDI (electronic data interchange) enrollment, you need to use the Upload an HRIS File function (see page 26), instead of the Express Enrollment function.

The Express Enrollment function allows you to upload to Harvard Pilgrim an Enrollment File that contains your employees' Harvard Pilgrim policy enrollment information. Express Enrollment comprises downloading a template, preparing your enrollment file, and then following a 3-step workflow, which includes selecting and uploading your Enrollment File, reviewing and submitting the uploaded policies, and reviewing the enrollment results. During the workflow you can download policies with errors, correct them, and upload those policies again.

#### How to...

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Review and Submit Policies – Step 2 of 3 – page 22

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## Downloading the HPHC Enrollment Template

**To access this page:** Click **Access Express Enrollment** in the *Employer Account* left menu.

To use Express Enrollment, you must enter the member information in a Microsoft Excel spreadsheet in a specific order using valid formats and values, and then upload the spreadsheet. We recommend that you use the HPHC Enrollment template provided by Harvard Pilgrim, which has built in data validations and list values to reduce errors. Or, you can create your own spreadsheet, as long as it exactly replicates the template's column heading names and order, otherwise the file will be rejected when you upload it.

### To download the HPHC Enrollment Template

1. Click **Download Template** on the **Express Enrollment Select and Upload File** page.
2. Save the template to your local computer.

**Warning:** Do not select **Save As Excel 97-2003 Workbook** compatible file format when saving the template. That Microsoft Excel file format results in errors when you attempt to use the template.

## Preparing Your Enrollment File

Follow these instructions to prepare your Enrollment File for upload.

- You must download the HPHC Enrollment template (see page 21), which is a Microsoft Excel spreadsheet (.xlsx), and use it to prepare your Enrollment File. The HPHC Enrollment template has built in data validations and list values, which will reduce data errors when you upload your Enrollment File.
- If necessary, you can create your own Enrollment File as long as you replicate the column heading names and their horizontal order exactly as shown in the HPHC Enrollment template. However, you will not have the data validations and formatting that is built into the Enrollment template. Alternatively, you could copy and paste the data from another spreadsheet into the HPHC Enrollment template spreadsheet.

  **Tip:** If you copy and paste data into the HPHC Enrollment template, click the **Paste Options** menu to the right of the pasted data, and then click **Match Destination Formatting** in the pop-up menu. This selection retains the data validation and formatting built into the template.
- The Enrollment File that you upload must be in Microsoft Excel .xlsx or .xls file format.
- You must sort the Enrollment File by the Subscriber SSN column before you upload it, so that subscribers and their dependents are grouped together in the file.

- You can upload all subscribers and their dependents in one Enrollment File or a subset of subscribers in several Enrollment Files, until all subscribers and their dependents are enrolled.
- You must upload dependents in the same Enrollment File as the subscriber.

**Note:** After you complete the Express Enrollment of your employees, when a new employee joins your company, you will enroll that new subscriber and their dependents using the Add or Re-Enroll a Subscriber function (see page 6), and not the Express Enrollment function.

## Selecting and Uploading an Enrollment File – Step 1 of 3

**To access this page:** Click **Access Express Enrollment** in the *Employer Account* left menu.

After you have prepared your Enrollment File, you can begin the first of three steps in the Express Enrollment process.

* A red asterisk indicates a required field.

### To select and upload an Enrollment File

Type the **Effective Date** * (the date on which an insurance binder or policy goes into effect) in an mm/dd/yyyy format or click the calendar icon to select the date. See page 7 for detailed instructions on entering dates.

**Note:** You can only enter an effective date within your allowable retro period (generally 60 days). Dates that cannot be selected are grayed out.

3. Click a **Change Reason** * for the new enrollment in the list.
4. Click **Browse** to locate and select the **Enrollment File** * (.xlsx or .xls) that you want to upload.
5. Click **Upload Enrollment File**. Step two in the workflow automatically appears: Review and Submit Policies (explained below).

## Reviewing and Submitting Policies – Step 2 of 3

**To access this page:** Click **Access Express Enrollment** in the *Employer Account* left menu. Complete the required fields, and then click **Upload Enrollment File**.

After you upload your Enrollment File, the second of three steps in the Express Enrollment process appears. This page states how many policies were uploaded and how many policies contain errors and cannot be submitted for enrollment. You use this page to download the file upload results and submit selected policies for enrollment.

### Did you upload the wrong file?

- Click **Return to File Upload** to return to step 1 (explained in the previous procedure) in the Express Enrollment process and upload a different Enrollment File.

## How to identify and submit policies that are ready for enrollment

- The blue status message above the table states how many **policies were uploaded**.
- The message inside the table states how many uploaded policies are error free and **Ready to process.**
- The policies that are ready for enrollment processing have a check mark by default in the **Select** column on the subscriber's row.
- You can download (see steps below) all policies, including those policies ready for enrollment and those policies with errors.

### To submit the selected policies for enrollment

1. Make sure there is a check mark in the **Select** column on the subscribers' rows whose policies you want to submit for enrollment. Click the **Select** check box to add or remove the check mark.
2. When you have completed your policy selections, click **Submit Selected Policies**. Step three in the workflow automatically appears: Review Enrollment Results.

## How to identify policies with errors that cannot be submitted for enrollment

**Note:** If any member in a policy has an error, the entire policy cannot be submitted for enrollment.

- The blue status message above the table lists the number of policies contain(s) errors and cannot be processed.
- A red **X** appears in the Select column on the subscriber's row and the dependent's row.
- The subscriber's and dependents' rows that contain errors are highlighted in yellow.
- The fields with errors have an exclamation point icon, the text is red, and the cell is highlighted in pink.
- You can download the policies with errors (see steps below), which cannot be submitted for enrollment, so you can resolve the errors.

### To view the errors

- Hover over the red **X** or hover over each field that has an error.

### To resolve the errors

- When you have errors in an uploaded Enrollment File, you can either:

  a. Download the error policies (see steps below), correct the errors, and then upload just the corrected policies using Express Enrollment. This scenario will allow you to then click **Submit Selected Policies** to submit those policies that are currently ready to process and are selected.

b Download all uploaded policies (see steps below), click **Cancel** to exit Express Enrollment, correct the errors, and then upload all the policies again using Express Enrollment. This scenario will allow you to submit all the policies together after you make the corrections to the error policies.

### Downloading the File Upload Results

You can download the file upload pre-submission results in a spreadsheet.

#### To download the policies with errors

1. Click **Download**, and then click **Error Policies**. The File dialog box appears.
2. Save the Microsoft Excel file to your computer.

   **Warning:** Do not select **Save As Excel 97-2003 Workbook** compatible file format when saving an Express Enrollment report. That Microsoft Excel file format prevents you from correcting errors in the downloaded report file, which means you cannot use the file to upload corrected policies.
3. If you are not going to submit the selected policies (see steps above) that are ready to process, click **Cancel** to exit Express Enrollment.
4. Make the corrections in the downloaded Pre-Submission Error Policies file.
5. Upload the corrected file (see page 22) using Express Enrollment.

#### To download all policies that you uploaded (with and without errors)

1. Click **Download**, and then click **All Uploaded Policies**. The **File** dialog box appears.
2. Save the Microsoft Excel file to your computer.

   **Warning:** Do not select **Save As Excel 97-2003 Workbook** compatible file format when saving an Express Enrollment report. That Microsoft Excel file format prevents you from correcting errors in the downloaded report file, which means you cannot use the file to upload corrected policies.
3. If you are not going to submit the selected policies (see steps above) that are ready to process, click **Cancel** to exit Express Enrollment.
4. Make the corrections in the downloaded Pre-Submission All Policies file.
5. Upload the corrected file (see page 22) using Express Enrollment.

## Reviewing Enrollment Results – Step 3 of 3

**To access this page:** Click **Access Express Enrollment** in the *Employer Account* left menu. Complete the required fields, and then click **Upload Enrollment File**. Select policies for processing and click **Submit Selected Policies**.

After you submit the selected policies (see page 22) for enrollment processing, the last of the three steps in the Express Enrollment process appears. This page states how many policies were

submitted for processing, how many policies were enrolled, and how many policies contain errors and cannot be enrolled. You can download the enrollment results (see steps below).

### How to identify successfully enrolled policies

- The blue status message above the table states the number of **Enrolled Policies**.
- The status message inside the table shows how many of the submitted policies have **Completed** processing.
- The policies that were enrolled successfully show the policy number above the transaction identifier in the **POLICY NO. TRANS ID.** column.
- You can download the enrolled policies (see steps below).

### How to identify policies with errors that were not enrolled

**Note:** If any member in a policy has an error, the entire policy was not enrolled.

- The blue status message above the table states the number of Error Policies that were not enrolled.
- A red **X** appears in the **STATUS** column on the subscriber's row.
- The error message appears in the **POLICY NO. TRANS ID**. column along with the transaction identifier.
- You can download the policies with errors (see steps below), which were not enrolled, so you can resolve the errors.

### How to identify policies that you did not select for enrollment

The policies that you did not select for enrollment in step 2 do not appear on this page. However, you can download all uploaded policies in which the not selected policies are included.

## Downloading the Enrollment Results

You can download several types of post-submission enrollment results in a spreadsheet.

#### To download enrolled policies

1. Click **Download**, and then click **Enrolled Policies**. The File dialog box appears.
2. **Save** the Microsoft Excel file to your computer.

   **Warning:** Do not select **Save As Excel 97-2003 Workbook** compatible file format when saving an Express Enrollment report. That Microsoft Excel file format prevents you from correcting errors in the downloaded report file, which means you cannot use the file to upload corrected policies.
3. When you are finished with the download, click **Close** to exit Express Enrollment.

### To download and resolve the policies with errors

**Note:** When you have errors in a submitted Enrollment File, you need to resolve the errors and resubmit those policies.

1. Click **Download**, and then click **Error Policies**. The File dialog box appears.
2. **Save** the Microsoft Excel file to your computer.

   **Warning:** Do not select **Save As Excel 97-2003 Workbook** compatible file format when saving an Express Enrollment report. That Microsoft Excel file format prevents you from correcting errors in the downloaded report file, which means you cannot use the file to upload corrected policies.
3. When you are finished with the download, click **Close** to exit Express Enrollment.
4. Make the corrections in the downloaded Post-Submission Error Policies file.
5. Upload the corrected file (see page 22) using Express Enrollment or manually add those subscribers' policies. (see page 6)

### To download all uploaded policies (enrolled policies, error policies, and policies that you did not select in step 2)

1. Click **Download**, and then click **All Uploaded Policies**. The File dialog box appears.
2. **Save** the Microsoft Excel file to your computer.

   **Warning:** Do not select **Save As Excel 97-2003 Workbook** compatible file format when saving an Express Enrollment report. That Microsoft Excel file format prevents you from correcting errors in the downloaded report file, which means you cannot use the file to upload corrected policies.
3. When you are finished with the download, click **Close** to exit Express Enrollment.

## Uploading an HRIS File

**To access this page:** Click **Upload HRIS File** in the *Employer Account* left menu. (Only Employers who have requested electronic data interchange (EDI) with Harvard Pilgrim see this menu command.)

You can upload to Harvard Pilgrim your Human Resources Information System (HRIS) file containing your employees Harvard Pilgrim enrollment information.

### To upload an HRIS file

1. Click **Browse** to locate the file on your computer or network.
2. Click **Upload**.

### To download an acknowledgement of the upload file

- Click **Download Acknowledgement** in the left menu.

## Downloading a Transmittal Acknowledgement

**To access this page:** Click **Download Acknowledgement** in the *Employer Account* left menu. (Only Employers who have requested electronic data interchange (EDI) with Harvard Pilgrim see this menu command.)

You can download or delete the transmittal Acknowledgement Receipts for the completed upload of your Human Resources Information System (HRIS) file to Harvard Pilgrim, in addition to the Guideline Error Reports, Failed Files, and Summary Receipts.

### To download a file

- Click the **Save** button in the Download File column next to the file you want to download from the HTTPS server, and then save the file to a location on your computer or network.

### To delete a file

- Click the **Delete** button in the Delete File column next to the file that you want to delete.

# Administering Users

"Users" are people in your company to whom you have granted permission to use the *Employer Account*. You determine the type of access they are allowed for the administrative and standard functions.

## Understanding the User Access Types

The Access Type assigned to an *Employer Account* user determines the actions the user can perform. Below are the descriptions of the *Employer Account* Access Types, followed by a graphical explanation of the allowed Administer Users actions.

- **AdminPlus** – User has access to multiple Employer IDs and can Administer Users (Add, Edit, Remove) in the *Employer Account*.
- **StandardPlus** – User has access to multiple Employer IDs and cannot Administer Users in the *Employer Account*.
- **Administrator** – User has access to only one Employer ID and can Administer Users (Add, Edit, Remove) in the *Employer Account*.
- **Standard** – User has access to only one Employer ID and cannot Administer Users in the *Employer Account*.
- **None** – User is an active contact at Harvard Pilgrim but does not have an *Employer Account* . An AdminPlus user or Administrator user can click **Add** next to the user's name on the Administer Users page (page 34) to create their *Employer Account.*

**Note:** Only Harvard Pilgrim can add or edit the Access Type **AdminPlus** or **StandardPlus** for a user or remove a user with one of these access types. Contact Account Services at 800-637-4751 weekdays between 8:00 A.M. and 5:00 P.M. Eastern Time.

| | **Harvard Pilgrim** | ***Employer Account* User Access Type** | | | |
|---|---|---|---|---|---|
| **Are these *Employer Account* Administer Users actions allowed?** | **Internal Staff** | **AdminPlus** | **Administrator** | **StandardPlus** | **Standard** |
| Add, edit, or remove a user in another Employer ID, other than the logged in Employer ID. | **Yes** | **No** | **No** | **No** | **No** |
| Add, edit, or remove a user's AdminPlus or StandardPlus access. | **Yes** | **No** | **No** | **No** | **No** |
| Edit or remove a user's Administrator access. | **Yes** | **Yes** | **Yes** | **No** | **No** |
| Edit or remove a user's Standard access. | **Yes** | **Yes** | **Yes** | **No** | **No** |
| Remove a user from the *Employer Account* | **Yes** | **Yes** | **Yes** | **No** | **No** |
| Reset a user's password. | **Yes** | **Yes** | **Yes** | **No** | **No** |

## Adding a New User

**Important:** Only authorized administrators can access and use this *Employer Account* administration function.

You may decide to have more than one person at your company use the *Employer Account* to perform transactions. For better security and control, you can set up individual usernames and passwords for each *Employer Account* user. With your authorization, your broker can also set up users in his/her firm to support your account.

* A red asterisk indicates a required field.

### To add a new user

1. Click **Administer Users** in the Employer Account left menu.
2. Do one of the following:
   a. If the user appears in the *Account* Users List with an Access Type of "None", click **Add** in the Actions column.
   b. If the user does not appear in the *Account* Users List, click **Add New User** at the bottom of the page.
3. On the Add New User page, enter the following user information:
   - First Name *
   - Last Name *
   - Username * – The Username must be unique and a minimum of six (6) alphanumeric characters.
   - Password * – The Password must be a minimum of eight (8) alphanumeric characters with at least one numeric character. Do not use a password that contains the employee's first name, last name, username, company name or a common dictionary word.
   - Confirm Password * – Re-type the password.
   - Access Type * – Click an access type in the list. Only select the Access type **Administrator** when you want to grant the user access to the administrator functions, as well as all the standard functions. For more information, see the topic Understanding the User Access Types.
4. Click **Save**.

## Editing a User

**Important:** Only authorized administrators can access and use the *Employer Account* administration functions.

* A red asterisk indicates a required field.

### To edit a user

1 Click **Administer Users** in the *Employer Account* left menu. 2 Click **Edit** in the Actions column for the user you want to edit.

3 On the Edit User page, you can edit the following user information:

- First Name *
- Last Name *
- Password – The Password must be a minimum of eight (8) alphanumeric characters with at least one numeric character. Do not use a password that contains the employee's first name, last name, username, company name or a common dictionary word.
- Confirm Password – Re-type the password.
- Access Type * – Click an access type in the list. Only select the Access type **Administrator** when you want to grant the user access to the administration functions, as well as all the standard functions in the *Employer Account*.
  **Note:** Only Harvard Pilgrim can edit the Access Type for a user who has **AdminPlus** or **StandardPlus**. Contact Account Services at 800-637-4751 weekdays between 8:00 A.M. and 5:00 P.M. Eastern Time.

4 Click **Save**.

**Note:** See page 19 for instructions on changing a user's password.

## Removing a User

**Important:** Only authorized administrators can access and use the *Employer Account* administration functions.

**Note:** Only Harvard Pilgrim can remove a user who has the Access Type **AdminPlus** or **StandardPlus**. Contact Account Services at 800-637-4751 weekdays between 8:00 A.M. and 5:00 P.M. Eastern Time.

You can remove a user's access to the *Employer Account* using these instructions.

### To remove a user

1 Click **Administer Users** in the *Employer Account* left menu. 2 Click **Remove** in the Actions column for the user you want to remove. 3 Click **Yes** to confirm the removal.

**Important:** This procedure only disables the user's access to other Harvard Pilgrim applications through the *Employer Account*. It does not completely remove the user from the Harvard Pilgrim system. To have the user removed from the system, contact Account Services at 800-637-4751 weekdays between 8:00 A.M. and 5:00 P.M. Eastern Time.

## Setting Preferences

**Important:** Only authorized administrators can access and use the *Employer Account* administration functions.

Setting preferences for your account allows you to determine which functions will be available to your employees when they log in to the *Employer Account*. With your authorization, your broker can also set up access levels in his/her firm to support your account.

You can set preferences for each Customer Account to control employee access to the *Employer Account.*

Specify if and how the employees in the selected Customer Account can perform these *Employer Account* tasks:

- **Approval Needed** – Employees' changes are pended awaiting Employer approval.
- **No Approval Needed** – Employees' changes are applied when submitted.
- **Disabled** – Employees are not allowed to perform this task.

**Note:** If you do not set preferences, the Customer Account will default to "Approval Needed."

### To set preferences

1. Click **Set Preferences** in the *Employer Account* left menu.
2. Select the check mark for the Customer Account(s) you want to edit.
3. Click **Edit Selected**. The preferences for the selected Customer Account(s) appear.
4. Edit the following fields:
   - **Submit Enrollment**
   - **Edit Subscriber/Dependent Information**
   - **Add or Terminate Dependent**
5. Click **Apply to All** to apply the selected customer account preferences to all the other accounts shown on the Edit Selected page.
6. Click **Submit**.
7. Respond **Yes** to the prompt. The Set Preferences page appears showing your selections.

### To apply a specific Customer Account preferences to all other accounts

- Click **Apply to All** in the **Action** column next to the account that you want to apply to all the other accounts in the list.

**To cancel any changes that you made**

- Click **Cancel** to exit the page without saving any changes that you made.

# Using the *Employer Account* Pages

This section provides an explanation of each of the *Employer Account* application's pages. This information is also accessible from the user interface by clicking the blue Help question mark button on each page.

## Add/Re-Enroll Subscriber page

**To access this page:** Click **Add/Re-Enroll Subscriber** in the left menu.

Enroll or re-enroll a Subscriber and their dependents in Harvard Pilgrim Health Care coverage. The enrollment information you enter is explained below.

* A red asterisk indicates a required field.

| **Effective Date and Change Reason** | |
|---|---|
| Effective Date * | Type the Effective Date (the date on which an insurance binder or policy goes into effect) in an mm/dd/yyyy format or click the calendar icon to select the date. See page 7 for detailed instructions on entering dates.<br>**Note:** You can only enter an effective date within your allowable retro period (generally 60 days). Dates that cannot be selected are grayed out. |
| Change Type | New Enrollment: (read only) |
| Change Reason * | Click a reason for the change in the list, and then click **Next**. The Change Reasons differ based on the selected Change Type. |
| **Plan Options** | |
| Plan Category * | Click a Plan Category in the list. The plan's **Medical ID**, **Prescription ID**, and **Customer Acct #** appear for your verification. |
| Plan Option * | Click a Plan Option in the list, and then click **Next**. The Plan Options differ based on the selected Plan Category. |
| **Medicare Enhance (This page only appears if you have selected a Medicare Enhance Category and Plan Option.)** | |
| Medicare Plan Code * | Select a Medicare Plan Code. |
| Hospital (Part A) * | Enter Hospital (Part A) – The effective date that appears on the subscriber's Medicare Card. |
| Medical (Part B) * | Enter Medical (Part B) date. – The effective date that appears on the subscriber's Medicare Card. |
| Medicare Claim Number * | Enter Medicare Claim Number – The Medicare beneficiary's assigned number, and then click **Next**. |

| Subscriber Information | |
|---|---|
| First Name *<br>Last Name *<br>Date of Birth *<br>Social Security # * | Enter the identifying Subscriber information, and then click **Next**. The First Name and Last Name fields each have a limit of 25 characters.<br>**Note:** If the person had a Harvard Pilgrim policy through your company in the last five years, the information for the subscriber and their formerly enrolled dependents will appear on the next page, where you can make changes as needed. |
| **Subscriber Information and Dependent Information** | |
| Subscriber information<br>Dependent information | The identifying Subscriber information is prefilled and highlighted. Enter or update the remaining Subscriber information and any Dependent information, and then click **Next**.<br>• To remove a formerly enrolled dependent, click **Remove Dependent**.<br>**Note1:** Please read the information on page 8 if you are adding an adult disabled dependent.<br>**Note2:** For some employers, you cannot choose Life Partner as the Relation to Subscriber if the gender of the subscriber and the dependent are the same. |
| **Select PCP** | |
| PCP is required for HMO and POS plans. | To select a PCP for a member, click **Select PCP** next to the member's name in the **Action** column. The **Select a PCP** page appears.<br>Enter the Provider search criteria, and then click **Search**. You must enter at least one of the following search criteria: Provider Last Name, Provider ID, or City.<br>In the Providers list, select the check box in the **Select PCP** column next to the Provider whom you want to assign as the Primary Care Physician. The PCP name appears next to the member's name in the member PCP list.<br>• To assign a PCP who is currently selected for one member to everyone on the list, click **Assign to All** next to the member's name in the **Action** column.<br>• To change a member's PCP, click **Change PCP** next to the member's name in the **Action** column. |
| | |
| Enrollment Summary | The Enrollment Summary allows you to view and verify the information you have entered, make any necessary changes, submit the transaction, and optionally print the transaction information.<br>When finished, click **Submit**. The following important information appears at the top of the page:<br>• Tracking Number<br>• Policy Number<br>**Important:** The transaction is not complete until you click **Submit**. Write down or save/print the **Tracking Number** and **Policy Number** by clicking **Print**. |

Click one of the following buttons to complete the action.

- **Next** – Click to move to the next section.
- **Search** – Click to begin search based on the criteria you have entered.
- **Cancel** – Click to cancel any changes made on the page, after which the system takes you back to the first page (Effective Date/Change Reason).
- **Edit** – Click to edit the selected section.
- **Edit Subscriber** – Click to edit the Subscriber.
- **Edit Plan Options** – Click to edit plan options.
- **Edit PCP** – Click to change the member's PCP.
- **Edit Dependent** – Click to edit the Dependent.
- **Remove Dependent** – Click to remove the Dependent from the enrollment.
- **Add Dependent** – Click to add a Dependent to the Subscriber's plan.
- **Submit** – Click to complete the transaction and view the Tracking Number and Policy Number.
- **Print** – Click to save and/or print the transaction information to a PDF file. If you click **Print** after you click **Submit**, you will capture the **Tracking Number** and **Policy Number**.

## Administer Users page

**To access this page:** Click **Administer Users** in the left menu.

You may decide to have more than one person at your company (e.g., Human Resources staff) use the *Employer Account* to perform actions. For better security and control, you can set up individual usernames and passwords for each *Employer Account* user. With your authorization, your broker can also set up users in his/her firm to support your account.

The Administer Users page lists the current users of the *Employer Account* application, their Employer, and their Access Type. It also lists contacts in your company who do not yet have an *Employer Account* (Access Type is "None") for whom you can create an account by clicking **Add**.

Employers that are shown in gray font require that you log into that account, using the Select Employer function, to administer those users.

* A red asterisk indicates a required field.

| **Administer Users** | |
|---|---|
| *Employer Account* Users List | The *Employer Account* Users List contains the following columns.<br>**Tip:** Click a column heading to sort the list by that column. Click the heading again to reverse the sorting order.<br>• Name<br>• Username<br>• Employer ID<br>• Employer Name<br>• Access Type – For an explanation, see the topic Understanding the User Access Types on page 28.<br>• Actions<br>  • Click **Edit** to edit an existing *Employer Account* user.<br>  • Click **Add** to add an existing contact to *the Employer Account.*<br>  • Click **Remove** to remove an *Employer Account* user. **Note:** Only Harvard Pilgrim can remove a user who has the Access Type **AdminPlus** or **StandardPlus**. Contact Account Services at 800-637-4751 weekdays between 8:00 A.M. and 5:00 P.M. Eastern Time. **Important:** The **Remove** action only disables the user's access to other Harvard Pilgrim applications through the *Employer Account*. It does not completely remove the user from the Harvard Pilgrim system. To have the user removed from the system, contact Account Services at 800-637-4751 weekdays between 8:00 A.M. and 5:00 P.M. Eastern Time.<br>Click **Add New User** at the bottom of the page to add a user to the *Employer Account* who is not in the Account Users List. |
| Add New User page<br><br>Edit User page | To add or edit a user, complete or edit the following fields, and then click **Save**.<br>• First Name *<br>• Last Name *<br>• Username * – You cannot change an existing Username.<br>• Password *<br>• Confirm Password *<br>• Access Type *<br>**Note:** Only Harvard Pilgrim can add or edit the Access Type **AdminPlus** or **StandardPlus** for a user. Contact Account Services at 800-637-4751 weekdays between 8:00 A.M. and 5:00 P.M. Eastern Time. |

Click one of the following buttons to complete the action.

- **Close** – Click to close the Administer Users page.
- **Save** – Click to save any changes.
- **Cancel** – Click to cancel any changes.

## Change Password page

**To access this page:** Click **Change Password** in the left menu.

Your user Password must be a minimum of eight alphanumeric characters with at least one numeric character. Do not use a password that contains your first name, last name, username, company name, or a common dictionary word. It cannot be a password that you have used in the past two years.

* A red asterisk indicates a required field.

| Change Password | |
|---|---|
| Username | This field is read only. |
| Current Password * | Enter your current password. |
| New Password * | Enter the new password. |
| Re-enter New Password * | Re-enter the new password. |

Click one of the following buttons to complete the action.

- **Change Password** – Click to submit the new password.
- **Clear** – Click to clear the fields.

## Changes Pending Approval Roster page

**To access this page:** Click **Changes Pending Approval** in the left menu.

If you set the preference that an approval is needed for this Account when the employees initiate a change in their Subscriber or Dependent information, you use this page to approve, deny, or hold the pending change(s).

| Changes Pending Approval Roster | |
|---|---|
| Roster tab | The Roster tab contains the following columns:<br>• Last Name<br>• First Name<br>• SSN<br>• Change Pending<br>• Effective Date of Change<br>• Action – Click **Open** to open the selected Subscriber's record.<br>Click a column heading to sort the list by that column. Click the heading again to reverse the sorting order. |
| Subscriber tab | The Subscriber tab contains information about a selected Subscriber.<br>From here you can edit the Subscriber's information and/or approve, deny, or hold the Subscriber's pending change(s). |

Click one of the following buttons to complete the action.

- **Edit** – If necessary, click to edit the pending change.
- **Approve Transaction** – Click to approve the transaction. Choosing **Approve Transaction** sends the transaction to Harvard Pilgrim Health Care. When you approve a transaction, you verify an employee's eligibility. In some situations, Harvard Pilgrim Health Care may need to work with you to ensure the validity of the information you provided.
- **Deny Transaction** – Click to deny the transaction. Choosing **Deny Transaction** cancels the transaction. It does not go to Harvard Pilgrim Health Care. You must choose a reason when you deny a transaction. The reason will appear on your Denied Transactions roster.
- **Cancel** – Click to exit the page and leave the changes pending approval on hold awaiting future approval or denial.

On the Enrollment Summary page, you can also click any of the following buttons to update information.

- **Edit Subscriber** – Click to edit the Subscriber.
- **Edit Plan Options** – Click to edit plan options.
- **Edit PCP** – Click to change the member's PCP.
- **Edit Dependent** – Click to edit the Dependent.
- **Remove Dependent** – Click to remove the Dependent from the enrollment
- **Add Dependent** – Click to add a dependent to the Subscriber's plan.

## Download Acknowledgement page

**To access this page:** Click **Download Acknowledgement** in the *Employer Account* left menu. (Only Employers who have requested electronic data interchange (EDI) with Harvard Pilgrim see this menu command.)

You can download or delete the transmittal Acknowledgement Receipts for the completed upload of your Human Resources Information System (HRIS) file to Harvard Pilgrim, in addition to the Guideline Error Reports, Failed Files, and Summary Receipts.

### To download a file

- Click the **Save** button in the Download File column next to the file you want to download from the HTTPS server, and then save the file to a location on your computer or network.

### To delete a file

- Click the **Delete** button in the Delete File column next to the file that you want to delete.

## Download Roster page

**To access this page:** Click **Manage Rosters** in the left menu, and then click the **Download Roster** tab.

Use this page download rosters to a comma-separated value file (.csv) for all or selected Customer Accounts. The following fields are available when you download an Active Roster.

- Member ID Number
- Subscriber's SSN
- First Name
- Last Name
- Date Of Birth
- Age
- Relation to Subscriber
- Selection Category
- Contract Type
- Product Address Line 1
- Address Line 2
- City
- State
- Country Zip
- Home Phone
- Gender
- Customer Account
- Work Phone
- PCP Number

| Download Roster | |
|---|---|
| Download Type | Click one of the following:<br>• Subscriber Only<br>• Subscriber and Dependents |

| Download Roster | |
|---|---|
| Roster Type | Click one of the following:<br>• Active Subscribers On – Select the date on which the Subscriber becomes active. Type the date in an mm/dd/yyyy format or click the calendar icon to select the date. See page 7 for detailed instructions on entering dates.<br>• Changes Pending Approval<br>• Changes Denied |

Click one of the following buttons to complete the action.

- **Show Customer Accounts** – Click to refresh the Customer Accounts in the list, if you changed the date in the **Roster Type Active Subscribers On field**.
- **Download All** – Click **Download All** to download rosters for all Customer Accounts to a comma-separated value file (.csv).
- **Download** – Select one or more Customer Accounts in the list, then click **Download** to download rosters for the selected Customer Accounts to a comma-separated value file (.csv).
- **Reset** – Click to reset the page to the default settings.

## Express Enrollment page

**Important:** If you have been set up for EDI (electronic data interchange) enrollment, you need to use the **Upload an HRIS File function** (see page 47), instead of the **Express Enrollment** function.

The Express Enrollment function allows you to upload to Harvard Pilgrim an Enrollment File that contains your employees' Harvard Pilgrim policy enrollment information. Express Enrollment comprises downloading a template, preparing your enrollment file, and then following a 3-step workflow, which includes selecting and uploading your Enrollment File, reviewing and submitting the uploaded policies, and reviewing the enrollment results. During the workflow you can download policies with errors, correct them, and upload those policies again.

### How to...

Download the HPHC Enrollment Template – page 21
Prepare Your Enrollment File – page 21
Select and Upload an Enrollment File – Step 1 of 3 – page 22
Review and Submit Policies – Step 2 of 3 – page 22
Review Enrollment Results – Step 3 of 3 – page 24

## Generate Report page – Dependent Termination Report

**To access this page:** Click **View Reports** in the left menu. On the Select a Report page, click **Dependent Termination Report**.

The Dependent Termination Report lists the dependents in the selected Customer Account(s) who were terminated within the specified date range. You can narrow the report's results by entering a Policy Number, Dependent Name, and/or Subscriber Social Security Number.

**To generate the Dependent Termination Report**

1. Type or select a **Report Start Date** and **Report End Date** within the last 6 months.
2. Enter any additional report parameters to narrow the report's results.
3. Optionally, click the check boxes next to the **Customer Account(s)** for which you want to generate a report. If you do not select a **Customer Account(s)**, a report for each account is generated.
4. Click **Generate Report**. The resulting report(s) appear in the list below the report parameters.
5. To save a report in Adobe Reader (.pdf) format or comma-separated value (.csv) format, click the corresponding button in the **Download** column, and then click **Save** at the prompt.

   **Important:** When downloading a .csv file, do not click **Open** at the prompt if Microsoft Excel is your default application, because Excel will automatically remove the leading zeros in the .csv file's numeric fields.

## Generate Report page – Member SSN Change Report

**To access this page:** Click **View Reports** in the left menu. On the Select a Report page, click **Member SSN Change Report**.

The Member SSN Change Report lists the active and terminated members in the selected Customer Account(s) whose Social Security Number changed within the specified date range, regardless of the method used to make the change (*Employer Account* application, EDI, phone, letter).

**Note:** If a member changed Customer Accounts, the member will appear in the report under the Customer Account in which they were located at the time the SSN change took place.

**To download the Member SSN Change Report**

1. Click **View Reports** in the *Employer Account* left menu. The Select a Report page appears.
2. Click **Member SSN Change Report**. The Generate Report page appears.
3. Type or select a **Report Start Date** and **Report End Date** within the last 6 months. By

   default, the prior 30 days are selected. If you change the date range, click **Show Customer Accounts** to refresh the Customer Accounts list.
4. Do one of the following:
   a. To download a report for all Customer Accounts, click **Download All Accounts**.
   b. To download a report for selected Customer Accounts, select the check box next to one or more Customer Accounts, and then click **Download Selected Accounts**.

**Note:** You cannot multi-select more than 88 Customer Accounts. If you want to report on more than 88 Customer Accounts, you need to use the **Download All Accounts** button.

5 Click **Save** at the prompt to save the report as a comma-separated value file (.csv). The Employer ID is appended to the file name.

**Important:** Do not click **Open** at the prompt if Microsoft Excel is your default application, because Excel will automatically remove the leading zeros in the .csv file's numeric fields.

## Manage Rosters Online page

**To access this page:** Click **Manage Rosters** in the left menu. Make sure the **Manage Rosters Online** tab is open.

Use this page to generate rosters online for active Subscribers and changes pending approval.

| Manage Rosters Online | |
|---|---|
| Active Subscribers | Select this roster to add, edit, or disenroll members and order ID cards. The Search page appears with the active Subscribers. |
| Changes Pending Approval | This list contains any changes you or the employee has made on the contract that have yet to be processed by Harvard Pilgrim.<br>Select this roster to approve, deny, or hold employee changes. You can also add, edit, or disenroll members. |

On the Search page, when you click **Open** next to a Subscriber, the Enrollment Summary page appears on which you can click a button to perform the following actions.

- **Edit Subscriber** – Click to edit the selected Subscriber.
- **Edit Plan Options** – Click to edit plan options.
- **Edit Dependent** – Click to edit dependent information.
- **Terminate Dependent** – Click to terminate the selected dependent.
- **Add Dependent** – Click to add a dependent to the Subscriber's record.
- **Terminate Contract** – Click to disenroll the Subscriber.

## Order ID Card page

**To access this page:** Click **Edit/Term Subscriber** in the left menu. Then find the Subscriber or Dependent for which you want to order the card, and then click **Order ID Card** next to his/her name.

**Note 1:** You do not need to request a new member ID card when you change the plan, change the Subscriber's name, or add a dependent. A new member ID card will be sent to the member automatically.

**Note 2:** Harvard Pilgrim Health Care no longer lists the Primary Care Physician's name and number on its ID cards, so it is not necessary to order a card if you have changed the Primary Care Physician.

**Important:** The member ID card will be mailed to the address that appears on the Order ID Cards page. If the mailing address for the plan is not correct, update the address (see page 10) before ordering card(s). If ordering a card for a dependent with a different address, their card will be sent to the address on file. Allow 7-10 days to receive the card(s).

### To print or order card(s)

1. Select the check box next to the Member(s) name, and then click the applicable button at the bottom of the page.

| Order ID Card | |
|---|---|
| Columns | The Order ID Card page contains the following columns:<br>• First Name<br>• Last Name<br>• Birth Date<br>• Gender<br>• Member ID #<br>**Tip:** Click a column heading to sort the list by that column. Click the heading again to reverse the sorting order. |
| Subscriber Mailing Address | The Member ID Card(s) will be mailed to the address shown. Please verify the Subscriber mailing address and update the address if necessary before ordering card(s). If ordering a card for a dependent with a different address, their card will be sent to the address on file. Allow 7-10 days for receipt of the card(s). |

2. Click one of the following buttons to complete the action.
   - **Order ID Cards** – Click to submit the order for the ID card.
   - **Print Temporary Cards** – Click to print a letter that serves as a temporary Harvard Pilgrim ID card.

     **Note:** You need Adobe Reader installed on your system to display and print the letter.
   - **Clear** – Click to clear all the fields.

## Select a PCP page

**To access this page:** **Click Add/Re-Enroll Subscriber** in the left menu. The **Select PCP** page appears after the **Effective Date and Change Reason**, **Plan Options**, and **Subscriber Information** pages.

**Note:** PCP is required for HMO and POS.

Use this page to select or edit a PCP (Primary Care Physician).

| Select a PCP | |
|---|---|
| Search criteria | • Provider Last Name<br>• Provider First Name<br>• Gender<br>• Provider ID<br>• Specialty<br>• City<br>• State<br>• ZIP Code<br>• Secondary Language<br>• Accepting New Patients<br>**Note:** You must enter at least one of the following search criteria: Provider Last Name, Provider ID, or City. |
| Providers | After entering search criteria and clicking **Search**, a list of Providers that match your search criteria appear in the Providers list with this information:<br>• Provider<br>• Gender<br>• Specialties<br>• Hospital Affiliations<br>• Secondary Languages<br>• Accepting New Patients<br>• Select PCP |

Click the following button and check box to complete the action.

- **Search** – Click to begin the Provider search based on the search criteria that you have entered.
- **Select PCP** – After the Search, click this box in the Select PCP column to assign the PCP to the member.

## Select a Report page

**To access this page:** Click **View Reports** in the left menu.

You use this page to select a report that you want to view and/or download.

### To select a report

- Click the hyperlinked report name. The Generate Report page appears on which you enter the report's parameters and download the report.

## Set Preferences page

**To access this page:** Click **Set Preferences** in the left menu.

Setting preferences for your account allows you to determine which functions will be available to your employees when they log in to the *Employer Account.* With your authorization, your broker can also set up access levels in his/her firm to support your account.

You can set preferences for each Customer Account to control employee access to the *Employers Account.*

You specify if and how the employees in the selected Customer Account can perform these *Employer Account* tasks:

- **Approval Needed** – Employees' changes are pended awaiting Employer approval.
- **No Approval Needed** – Employees' changes are applied when submitted.
- **Disabled** – Employees are not allowed to perform this task.

**Note:** If you do not set preferences, the Customer Account will default to “Approval Needed.”

| Select Customer Account(s) |
| --- |
| • Select the check box for the Customer Account(s) that you want to edit.<br>• Click **Edit Selected**. The preferences for the selected Customer Account(s) appear.<br>• Click **Apply to All** in the Action column to apply the selected Customer Account preferences to all other accounts in the list.<br>• Click **Cancel** to cancel any changes made. |

| Set Preferences |
| --- |
| Specify if and how the employees in the selected Customer Account(s) can perform these *Employer Account* actions.<br>• Submit Enrollment<br>• Edit Subscriber/Dependent Information<br>• Add or Terminate Dependent<br><br>Click one of the following buttons to complete the action.<br>• **Apply to All** – Click to apply the selected customer account's preferences to all the other accounts shown on the Edit Selected page.<br>• **Submit** – Click to submit changes to the record. Respond **Yes** to the prompt.<br>• **Cancel** – Click to cancel any changes made. |

## Select Employer page

**To access this page:** Click **Select Employer** or **Select Another Employer** in the left menu. The Select Employer page appears.

**Important:** The **Select Employer** or **Select Another Employer** functions only pertain to users who have **AdminPlus** or **StandardPlus** access to more than one Employer ID.

If you are a user who has **AdminPlus** or **StandardPlus** access to more than one Employer ID, when you log into the *Employer Account* you will see only the **Select Employer** function. You must select an employer before you see all your allowed functions in the left menu. Any actions that you perform will be for the selected employer, until you select another employer.

Users who have access to only one Employer ID will immediately see the Welcome page with all their allowed functions in the left menu. They will not see the **Select Employer** function.

| Select Employer |
| --- |
| • Select the **Employer Name** from the list. If necessary, click **Clear** to clear the Employer Name field.<br>• Click **Save Selection**.<br>• Click **OK** in the pop-up message. The functions in the left menu now pertain to the selected employer, whose name appears in parentheses in the top navigation bar. |

## Subscriber Management Search page

**To access this page:** Click **Edit/Term Subscriber** or **Search Subscribers** in the left menu, or click **Manage Rosters** in the left menu and then click **Active Subscribers**.

Beginning on the Subscriber Management page, you can:

- Search for Subscribers and Dependents
- Order ID Cards
- Edit Subscribers and Dependents
- Remove a Dependent from a Subscriber's contract
- Terminate a Subscriber's contract
- Approve or Deny transactions for enrolled Subscribers

| **Search Tab** | |
|---|---|
| First Name | Type a partial or the complete first name. |
| Last Name | Type a partial or the complete last name. |
| Social Security # | Type a Social Security Number. |
| Subscribers | After you click **Search**, the names that meet your search criteria appear in the **Subscribers** list.<br>The following is a complete search results information.<br>• Last Name<br>• First Name<br>• Birth Date<br>• Gender<br>• SSN (Social Security Number)<br>• Member ID #<br>• Change Type<br>• Action – Click Open to view and/or edit subscriber information; or terminate the subscriber. Click Order ID Card to order an ID card for the subscriber and/or his/her dependent(s).<br>After finding a Subscriber's record (see page 11), you can:<br>• View and edit the Subscriber and Dependents' information<br>• Terminate the Subscriber contract (see page 11)<br>• Approve or Deny pending changes (see page 15)<br>If needed, click **Clear** to clear the list. |

Click one of the following buttons to complete the action.

- **Search** – Click to begin search base on the criteria you have entered.
- **Clear** – Click to clear all the fields.

## Update E-Mail Addresses page

**To access this page:** Click **Update Logo/E-mail Addresses** in the left menu, and then click the **Update E-Mail Addresses** tab.

| Update E-Mail Addresses | |
|---|---|
| E-mail addresses | Enter the e-mail address(es) (see page 19) of the people, including Brokers, who will be notified every 3 days when there are Employee transactions awaiting approval for your account. To enter multiple e-mail addresses, separate each address with a semicolon (;), for example JohnSmith@domain.com;JaneDoe@domain.com. |

Click one of the following buttons to complete the action.

- **Update** – Click to update the e-mail address.
- **Reset** – Click to reset the page to the default settings.

## Upload HRIS File page

**To access this page:** Click **Upload HRIS File** in the *Employer Account* left menu. (Only Employers who have requested electronic data interchange (EDI) with Harvard Pilgrim see this menu command.)

You can upload to Harvard Pilgrim your Human Resources Information System (HRIS) file containing your employees Harvard Pilgrim enrollment information.

### To upload an HRIS file

1. Click **Browse** to locate the file on your computer or network.
2. Click **Upload**.

### To download an acknowledgement of the upload file

- Click **Download Acknowledgement** in the left menu.

## Upload Logo page

**To access this page:** Click **Update Logo/E-mail Addresses** in the left menu. Make sure that the **Upload Logo** tab is selected.

You can automatically co-brand the Employer and Member pages by browsing for, selecting, and uploading your company's logo file. The logo area is 68 pixels high x 210 pixels wide. If your logo is larger, it will be scaled to fit; if it is smaller, it will remain as uploaded. You can also remove the currently displayed logo by clicking the **Remove Logo** button.

| Upload Logo | |
|---|---|
| Logo | Select a logo file in .jpg or .gif file format only. |

1. Click **Browse** to find and select a logo file to upload.
2. Click one of the following buttons to complete the action:

   **Upload Logo** – Click to upload the selected logo file.

   **Remove Logo** – Click to remove the logo currently displayed in the upper right corner of the page.

   **Clear** – Click to clear the data in the Logo field.

## View Benefits Information page

**To access this page:** Click **View Benefits Information** in the left menu.

### To view a specific Schedule or Summary of Benefits (SOB) or Benefit Handbook that your company offers

- Locate the customer and product in the list, and then click **Open** in the Plan Documents column.

  **Tip:** Click a column heading to sort the list by that column. Click the heading again to reverse the sorting order.

**Note:** The Schedule of Benefits is effective on the day you view it. It is subject to change due to federal and state mandates.

| Columns | |
|---|---|
| Customer Name | Lists all of your company's customer names. |
| Customer Account | Lists all of your company customer accounts. |
| Product | Lists the product for the customer. |
| Plan Documents | Click **Open** to view the Summary of Benefits or Benefit Handbook for that customer. |

# Opening Online Billing

Online Billing is a Harvard Pilgrim Health Care application that allows you to manage and pay your invoices in a secure environment. You can:

- Pay invoices online
- Access your invoice history
- Receive a preliminary bill and adjust it prior to receiving your final bill
- Select a final bill date that is aligned to your business process
- Define who receives notification of invoice availability and who can authorize payment online

### To open the Online Billing application

- Click **Open Online Billing** in the left menu. The Online Billing application opens in a new browser window.

# Viewing Analytics

The Harvard Pilgrim Online Analytics application provides employers who have 100 employees or more with custom information to help guide your strategic approach to benefits and wellness. Using Online Analytics you can:

- Build an overall strategy based on your specific information, including key metrics that compare your organization's experience against Harvard Pilgrim benchmarks.
- Easily access a monthly dashboard of key metrics or select from 16-20 reports ranging from membership statistics, cost and utilization, prescription drug data and more.
- Access your specific information when you want it and in the format you need. Data is refreshed monthly and all reports can be downloaded in either Excel or PDF formats.
- Choose from standard reports or create your own based on what is important to you.

### To view analytics

- Click **Online Analytics** in the left menu. The Online Analytics application opens in a new browser window.

# Viewing Form 5500 Schedule A Data

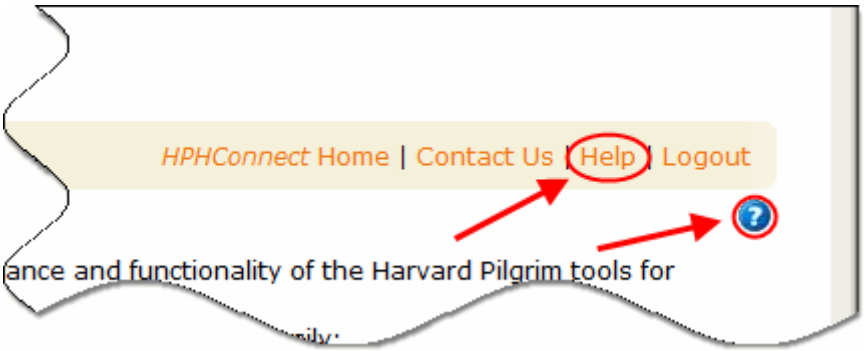
You can generate, view, and save customer account information in a detail or summary report by date range, which you can use then to complete the Federal Form 5500 Schedule A Annual Return/Report of Employee Benefit Plan.

### To view Form 5500 Schedule A data

1. Click **View Form 5500/Schedule A Data** in the left menu.
2. Select a **Report Type**: Customer Account Detail or Group Summary.
   a. For a Customer Account Detail report, select the check box next to a **Customer(s)** in the table, and select a **Start Date** and **End Date**.
   b. For a Group Summary report, select a **Group**, **Start Date**, and **End Date**. Then, select the check box next to a **Customer(s)** in the table.
3. Click **Generate Report**, and then click **Open** to view the report in Adobe Reader or **Save** to save the PDF file to your computer.

# Using the Help System

You can access online Help by either clicking the Help link to open the Help start page or clicking the blue Help question mark button to open the Help topic for the current page. Both appear in the upper right corner of the *Employer Account* window.




In the Help window, you can:

- Click **Contents** to view the Table of Contents in the left frame, and the corresponding topic on the right.
- Click **Index** to find topics by keyword. When you click a keyword, corresponding topics appear on the right.
- Click **Search** to search using a standard search tool.
- Click the red **X** box in the corner of the left frame to hide that frame.
- Right-click a Help topic in the right frame and select **Print** (in Internet Explorer) or **This Frame** > **Print Frame** (in Firefox) to print the topic.