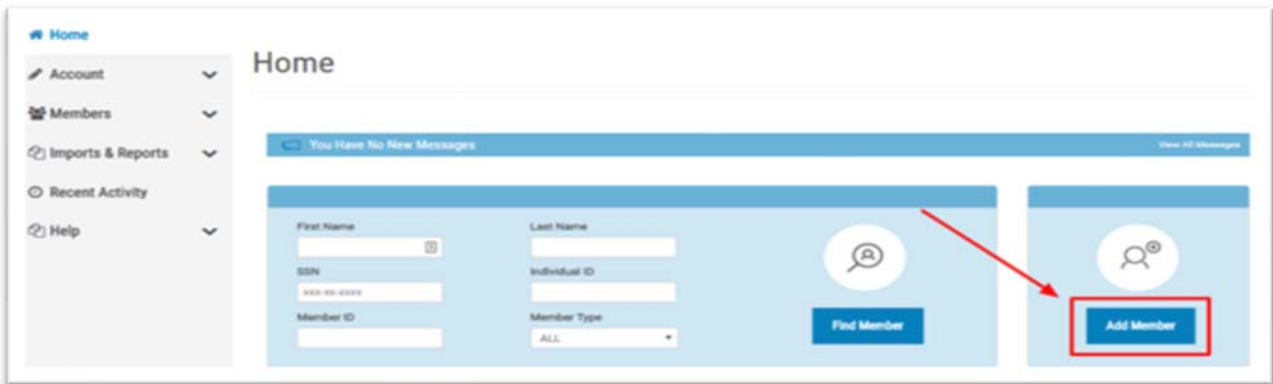


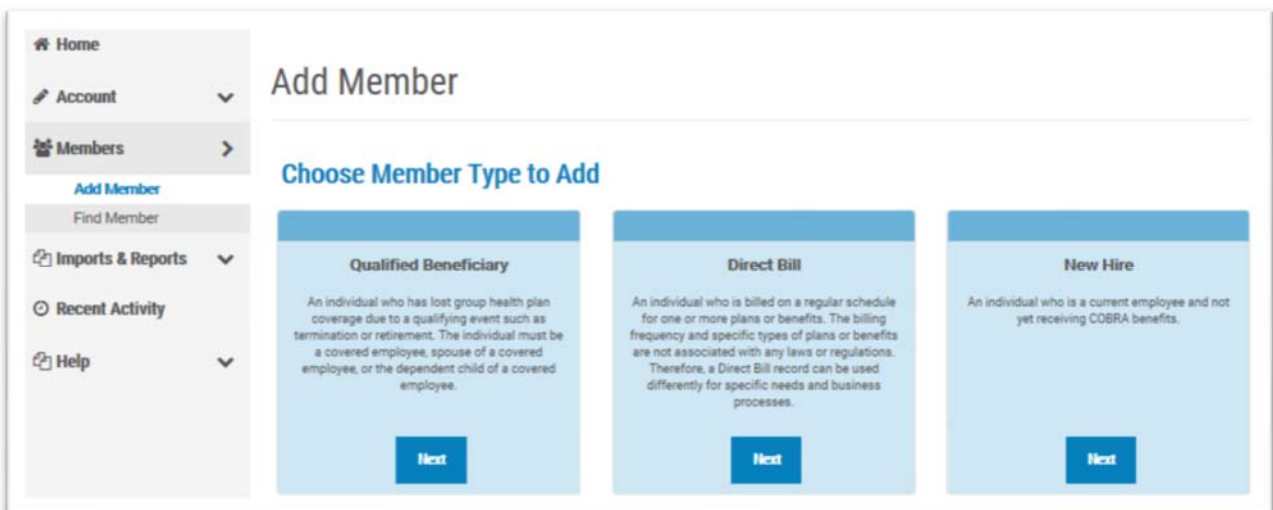
DIRECT BILL: ADDING A DIRECT BILL MEMEBER

All retirees and participants on leave must be added to the system as a new Direct Bill Member. The Direct Bill Member's general information is required. You will then apply the appropriate plans for the Direct Bill Member's coverage. If there are any dependents, they are to be added as well. The last step, if required, is to put in place a subsidy schedule.

Step 1: From the **HOME** page of your company's **CLIENT PORTAL**, click **ADD MEMBER**.

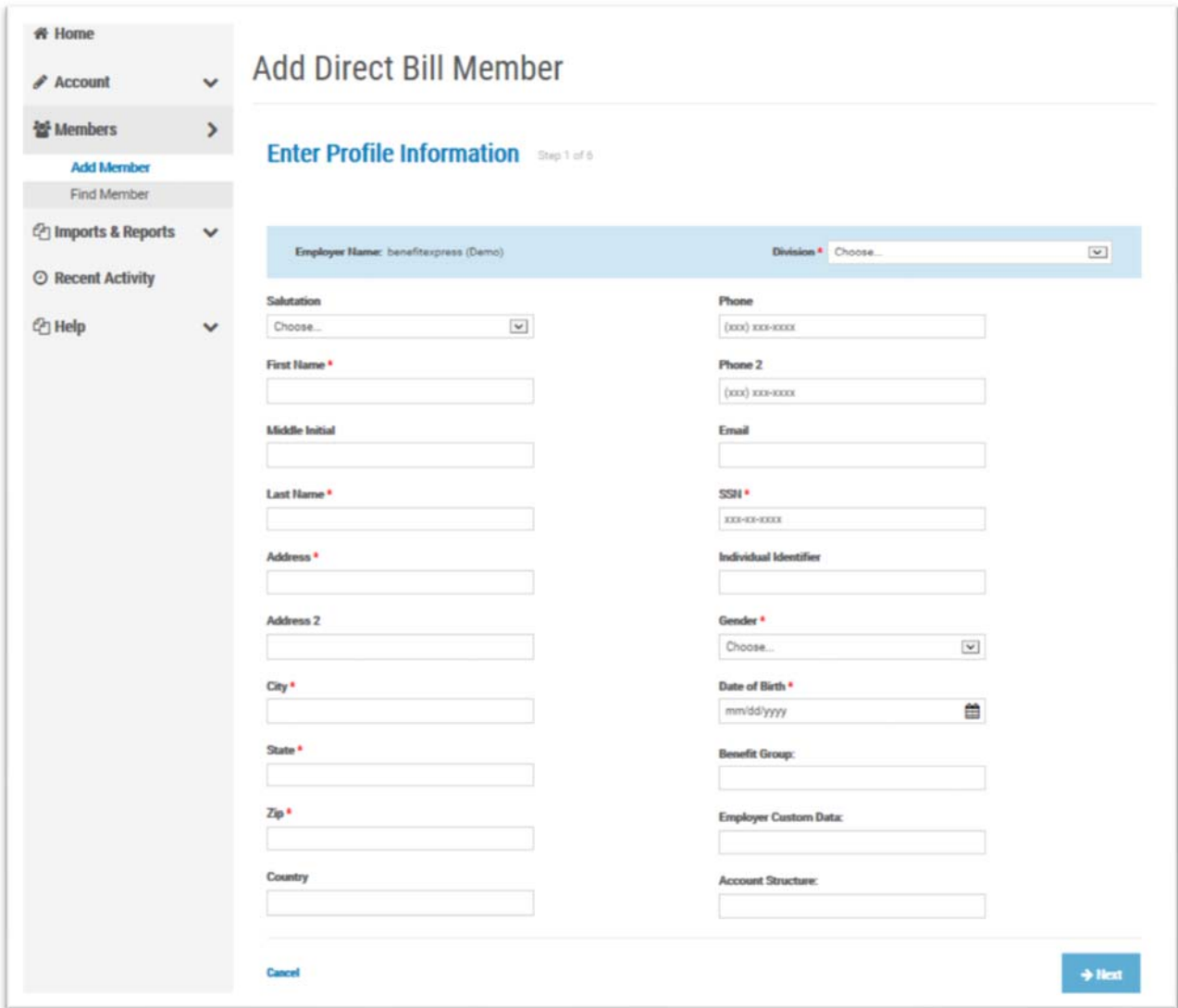


Step 2: On the next page, click **NEXT** under **Direct Bill**.



Step 3: On the next page, enter the Direct Bill Member's basic profile information. All fields with a red asterisk are required. When finished, click the **NEXT** button to continue to the **EVENT** page.

****Please make sure to add an email address and phone number, in case we need to contact the Direct Bill Member about their account.****



- Home
- Account
- Members
- Add Member
- Find Member
- Imports & Reports
- Recent Activity
- Help

Add Direct Bill Member

Enter Profile Information Step 1 of 6

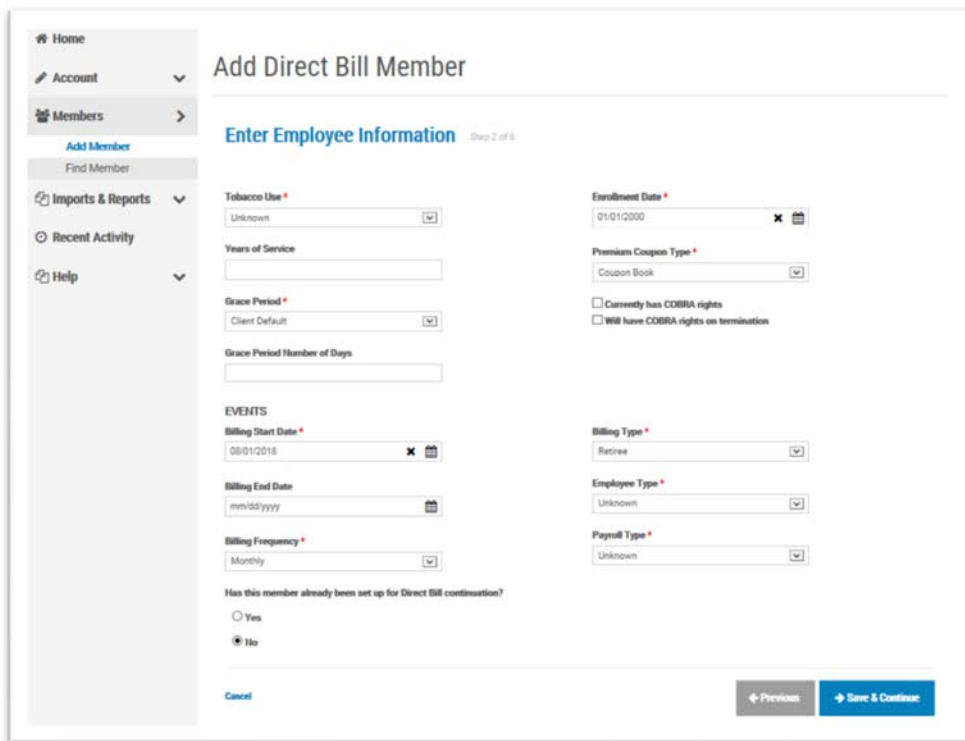
Employer Name: benefitexpress (Demo) Division * Choose...

<p>Salutation</p> <input type="text" value="Choose..."/> <p>First Name *</p> <input type="text"/> <p>Middle Initial</p> <input type="text"/> <p>Last Name *</p> <input type="text"/> <p>Address *</p> <input type="text"/> <p>Address 2</p> <input type="text"/> <p>City *</p> <input type="text"/> <p>State *</p> <input type="text"/> <p>Zip *</p> <input type="text"/> <p>Country</p> <input type="text"/>	<p>Phone</p> <input type="text" value="(xxx) xxx-xxxx"/> <p>Phone 2</p> <input type="text" value="(xxx) xxx-xxxx"/> <p>Email</p> <input type="text"/> <p>SSN *</p> <input type="text" value="xxx-xx-xxxx"/> <p>Individual Identifier</p> <input type="text"/> <p>Gender *</p> <input type="text" value="Choose..."/> <p>Date of Birth *</p> <input type="text" value="mm/dd/yyyy"/> <p>Benefit Group:</p> <input type="text"/> <p>Employer Custom Data:</p> <input type="text"/> <p>Account Structure:</p> <input type="text"/>
---	---

Cancel
→ Next

Step 4: On the next page, unless specifically used by your organization, you can leave the Tobacco Usage, and Years of Service, as “Unknown”. For the grace period, select client default, custom, or ignore, (If the grace period is a custom grace period, you will need to enter the Grace Period Number of Days). Under Events, select the date in which direct billing should start. If there is an end date of the direct billing enter this date. If there is no end date, this can be left blank. For the Billing Frequency, always select Monthly. Select Yes or No if the member has already been set up for Direct Bill Continuation. Enter the enrollment date in which the member enrolled in coverage. Under Premium Coupon Type, always select “Coupon Book”. Select if the member has COBRA rights and if they will have COBRA rights when their Direct Billing ends. Select the billing and employee type. For the payroll type, unless specifically used for your organization, you can leave as Unknown.

Select the **Save & Continue** button to continue to the **PLANS** page.

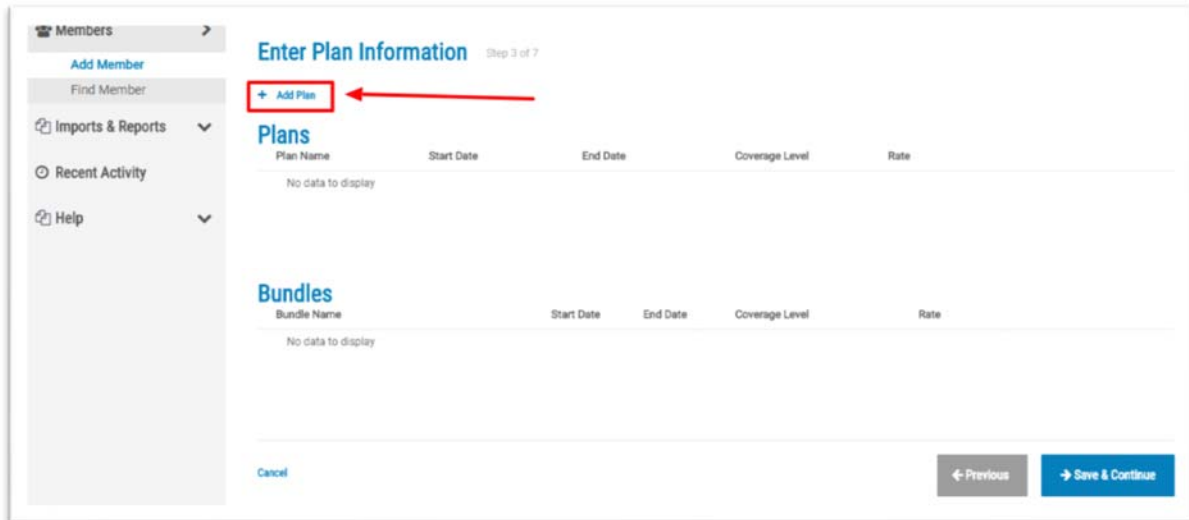


The screenshot shows a web form titled "Add Direct Bill Member" with the sub-header "Enter Employee Information" (Step 2 of 3). A left-hand navigation menu includes Home, Account, Members (with sub-options Add Member and Find Member), Imports & Reports, Recent Activity, and Help. The form fields are as follows:

- Tobacco Use:** Dropdown menu set to "Unknown".
- Years of Service:** Empty text input field.
- Grace Period:** Dropdown menu set to "Client Default".
- Grace Period Number of Days:** Empty text input field.
- EVENTS:**
 - Billing Start Date:** Date picker set to 08/01/2018.
 - Billing End Date:** Date picker set to mm/dd/yyyy.
 - Billing Frequency:** Dropdown menu set to "Monthly".
- Enrollment Date:** Date picker set to 01/01/2000.
- Premium Coupon Type:** Dropdown menu set to "Coupon Book".
- COBRA Rights:**
 - Currently has COBRA rights
 - Will have COBRA rights on termination
- Billing Type:** Dropdown menu set to "Retiree".
- Employee Type:** Dropdown menu set to "Unknown".
- Payroll Type:** Dropdown menu set to "Unknown".

At the bottom, there is a question: "Has this member already been set up for Direct Bill continuation?" with radio buttons for "Yes" and "No" (selected). Navigation buttons at the bottom right include "Cancel", "Previous", and "Save & Continue".

Step 5: Now you must add the plans for the Direct Bill Member. From the **PLANS** page, select the **ADD A PLAN** button.



The screenshot shows the 'Enter Plan Information' page, which is Step 3 of 7. On the left sidebar, there are navigation options: 'Members', 'Add Member', 'Find Member', 'Imports & Reports', 'Recent Activity', and 'Help'. The main content area is titled 'Enter Plan Information' and contains a '+ Add Plan' button highlighted with a red box and a red arrow. Below this are two sections: 'Plans' and 'Bundles'. Each section has a table with columns for Plan Name, Start Date, End Date, Coverage Level, and Rate. Both tables currently show 'No data to display'. At the bottom of the page, there are three buttons: 'Cancel', 'Previous', and 'Save & Continue'.

Step 6: Choose the **PLAN** and **COVERAGE LEVEL** and the **Start Date**. If there is an end date for the plan, enter this date. Do not make any changes to the **ADMIN FEES**. Click **Add** to add the plan. If rates are member specific, you will need to enter the monthly rates for the plan.

ADDING A DIRECT BILL MEMBER

Add Plan

Plan
 Bundle

Plan *
Dental TEST

Coverage Level *
[E] + spouse

Plan rate for the selected coverage level is: \$10.00

Start Date *
07/01/2018

End Date
mm/dd/yyyy

COVERAGE PERIOD
First Day of Coverage: 07/01/2018
Last Day of Coverage:

ADMIN FEES

+ Add Direct Bill Plan Admin Fee Override

Start Date	End Date
No data to display	

Step 7: The first plan should now be visible. You may add any other necessary plans via the same method. Once all the necessary plans have been added for the Direct Bill Member, select the **SAVE AND CONTINUE** button to go to the **DEPENDENTS** tab.

Enter Plan Information Step 3 of 6

[+ Add Plan](#)

Plans

DENTAL

Plan Name	Start Date	End Date	Coverage Level	Rate	
> Dental TEST	07/01/2018		EE + Spouse	\$10.00	Edit Drop Delete

Bundles

Bundle Name	Start Date	End Date	Coverage Level	Rate
No data to display				

[Cancel](#) [← Previous](#) [→ Save & Continue](#)

Step 9: The next step is to add all dependents to be included in the billing. Select the **ADD A DEPENDENT** button to continue. If the Direct Bill Member you are adding does not have any covered dependents, simply click **SAVE AND CONTINUE**.

ADD DIRECT BILL MEMBER

Enter Plan Information Step 3 of 6

[+ Add Plan](#)

Plans

DENTAL

Plan Name	Start Date	End Date	Coverage Level	Rate	
> Dental TEST	07/01/2018		EE + Spouse	\$10.00	Edit Drop Delete

Bundles

Bundle Name	Start Date	End Date	Coverage Level	Rate
No data to display				

[Cancel](#) [← Previous](#) [→ Save & Continue](#)

Step 10: Enter all the required fields (with red asterisk), and please include the **SSN** and **DOB**.

Add Dependent ✕

Relationship *

Qualified Medical Child Support Order (QMCSO)


Salutation

First Name *


Middle Initial



Last Name *

SSN

Date of Birth
 

Gender

Enrollment Date
 

Plan Start Date *
  

Address same as Direct Bill

Address *

Address 2

City *

State *

Zip *

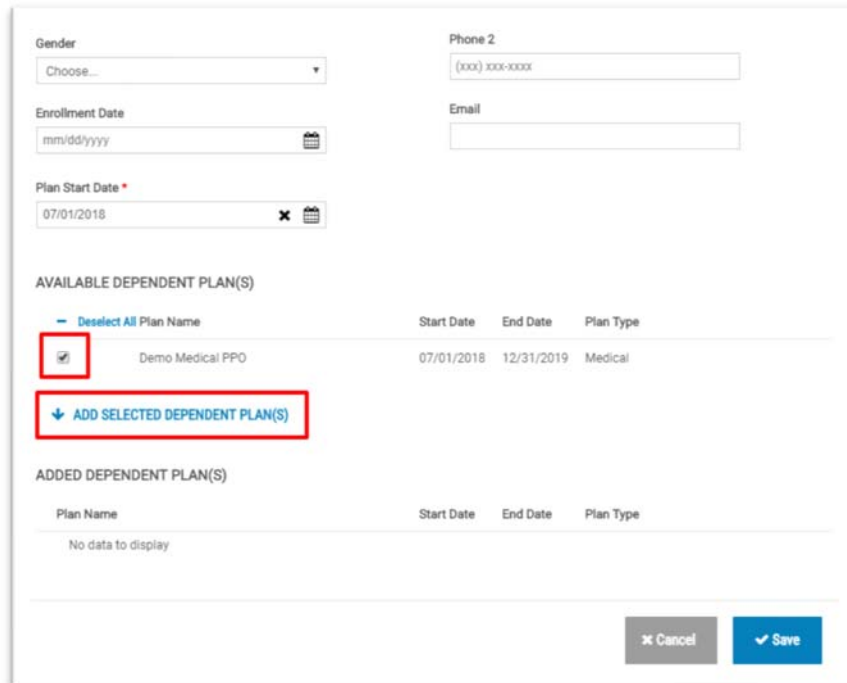
Country

Phone

Phone 2

Email

Step 11: After adding the dependent’s details, you will see the Plan Information appear below. Check the box to select the plan(s) that the dependent should be offered, then click **ADD SELECTED DEPENDENT PLAN(S)**. You will see each added plan appear in the list under “Added Dependent Plan(s)”.



Gender: Choose... Phone 2: (xxx) xxx-xxxx

Enrollment Date: mm/dd/yyyy

Plan Start Date: 07/01/2018

EMAIL

AVAILABLE DEPENDENT PLAN(S)

	Start Date	End Date	Plan Type
<input checked="" type="checkbox"/> Demo Medical PPO	07/01/2018	12/31/2019	Medical

ADD SELECTED DEPENDENT PLAN(S)

ADDED DEPENDENT PLAN(S)

Plan Name	Start Date	End Date	Plan Type
No data to display			

Cancel Save

Step 12: Once all plans appear under Added Dependent Plan(s), click **ADD**.

Step 13: Now that the first dependent has been added, you may add any others that may exist. If there are no other dependents to add, then you can select the **SAVE AND CONTINUE** button to continue to the **SUBSIDIES** tab. If you do not need to add subsidies, just click **SAVE AND CONTINUE**.

ADD DIRECT BILL MEMBER

Dependents Step 4 of 6

Mary Smith has been successfully added as a Dependent

+ Add Dependent

Name	Relationship	Date of Birth	SSN	Gender	Edit	Delete
> Smith, Mary	Spouse	02/01/1990	998-77-8897	F		

Cancel ← Previous → Save & Continue

Step 14: On the Subsidies page, select the **ADD A SUBSIDY SCHEDULE** button to set the details of the subsidy.

Add Direct Bill Member

Subsidies Step 5 of 6

+ Add Subsidy Schedule


Start Date	End Date	Plan Type	Subsidy Type	Subsidy Amount Type	Amount
No data to display					


Cancel ← Previous → Save & Continue

Step 15: Set the **SUBSIDY SCHEDULE** by completing the required fields. The Subsidy Schedule Start must be set to the first day of the month in which the subsidy goes into effect. When finished, click **ADD**

ADDING A DIRECT BILL MEMBER

Add Subsidy Schedule ✕

Subsidy Schedule Start: * ✕ 

Subsidy Schedule End: * ✕ 

Subsidy Schedule Type: *

Subsidy Schedule Amount Type: * ▼

Plan Type: * ▼

Amount: *

Step 16: Review and edit the subsidy details if desired. Click **SAVE AND CONTINUE** to proceed.

Subsidies Step 5 of 6

Subsidy Schedule has been successfully added

[+ Add Subsidy Schedule](#)

Start Date	End Date	Plan Type	Subsidy Type	Subsidy Amount Type	Amount	
08/02/2018	08/02/2018	Medical	Employer Subsidy	Flat Amount	\$10.00	Edit Delete

[Cancel](#)
← Previous
→ Save & Continue

Step 17: On the Letter Attachments page, click **ADD MEMBER** if all previous information added is correct.

Add Direct Bill Member

Letter Attachments Step 6 of 6

Attach	Name
No data to display	

Showing 0 to 0 of 0 entries

[Cancel](#)
← Previous
→ Add Member

Congratulations! The Direct Bill Member has been added. You should be directed back to the home page with a confirmation message stating that the Direct Bill Member you entered has been added.