

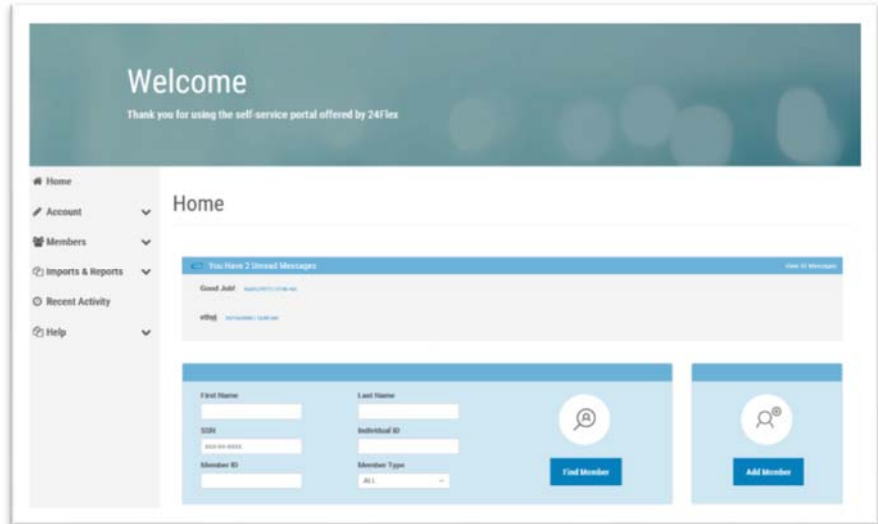
The Employer Portal is designed to give you secure, 24-hour access to manage your account. Examples of the information and tools you'll find on the Employer Portal include:

Once you're logged in, everything you need to efficiently and effectively manage your Direct Bill accounts is found on the Home page.

From the Home page, you can:

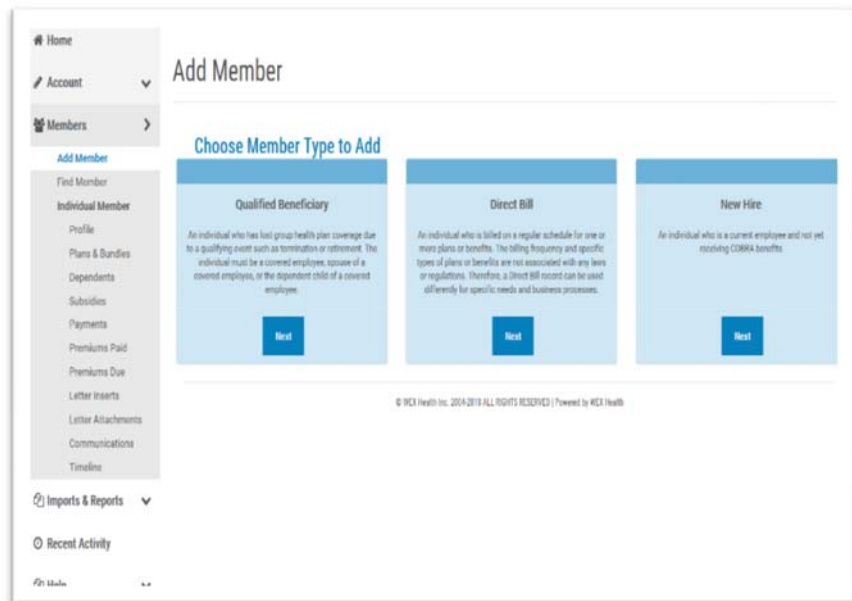
- Add a new member
- View member-level data
- Run Reports
- View plan information
- View communications

The options within the left navigation Main Menu will direct you to any action you need to take.



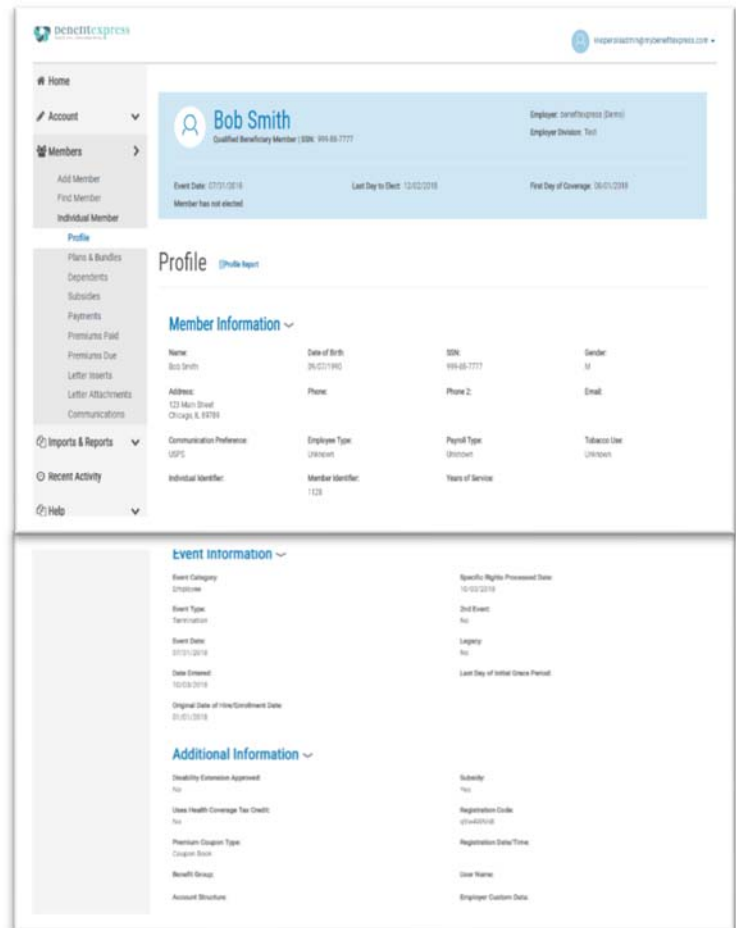
HOW DO I ADD NEW MEMBERS?

1. You can add a new member using the **Add Member** option available on the Home page or from the **Members** menu option.
2. Select the member type you'd like to add: Qualified Beneficiary, Direct Bill (includes retiree and leaves) or New Hire.
3. Click the **Next** button for the member type to begin the process of adding the new member.
4. Complete the required fields, marked with a red asterisk, and click **Next**.
5. Click **Save and Continue** to add new member information until you have completed all required steps. The appropriate notification letter will be generated by the system and will automatically be sent to your administrator for printing and mailing.



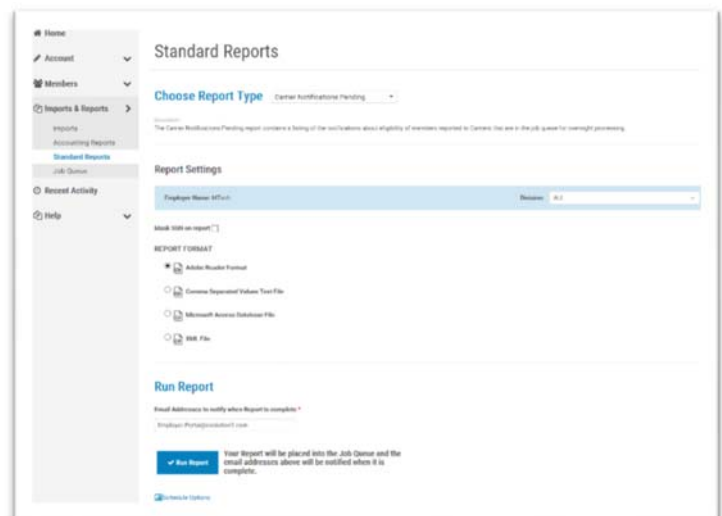
WHAT KIND OF MEMBER-LEVEL DATA CAN I ACCESS?

1. You can locate a member's record using the **Find Member** option available on the Home page or from the **Members** menu option.
2. You can search for members using first name, last name, SSN, Individual ID, Member ID, as well as Member Type.
3. Once in the member view, you can access the following information:
 - Demographics
 - Event Information
 - Payments after system upgrade
 - Plan Enrollments
 - Communications
 - Letter Attachments



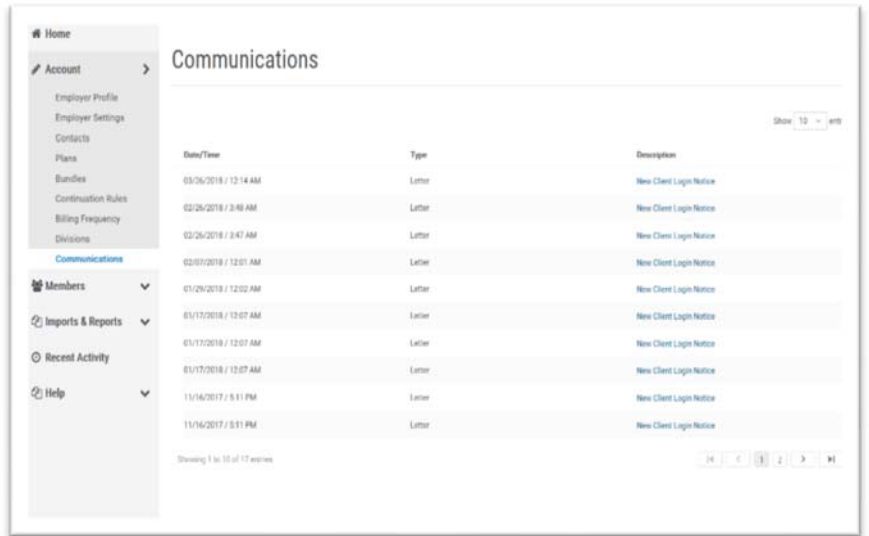
HOW DO I VIEW AND REQUEST REPORTS?

1. Select the **Imports & Reports** option to expand it and show the **Accounting Reports** and **Standard Reports** options.
2. After selecting either report option, you will be provided with a drop-down menu to choose which report you would like to generate.
3. Complete the required fields, marked with a red asterisk, and click the **Run Report** button.
4. The report will generate and be available in the **Job Queue**.
5. At the bottom of the page for the chosen report, you are also able to schedule a report for a given date and time, as well as allow the report to generate continuously on a schedule.



HOW DO I VIEW COMMUNICATIONS AND MESSAGES?

1. Select the **Account** option to expand it and show the **Communications** option.
2. From the Communications page you can view the communications provided specifically for you. In addition, selecting the **Communications** option once you've located a member and are in the member view, allows you to view the communications provided for the member



WILL I BE ABLE TO ACCESS ANY OF MY PLAN INFORMATION?

1. Select the **Account** option to expand it and show the **Plans** and **Bundles** options.
2. Selecting either option will display the plans or bundles for Qualified Beneficiary and Direct Bill members.
3. Information available includes:
 - Carrier Information
 - Plan Settings
 - Rates

