Slide 1 - Slide 1

Text Captions

Welcome to the Eligibility-Based Billing tutorial. You will learn how to view and perform basic tasks within the Account Summary, Payment History, and Edit Payment Method.

Audience: Employers

Module Length: approx 13 minutes

Last Updated: 8/20/2007

Welcome to the Eligibility-Based Billing Tutorial

Slide 2 - Slide 2

Text Captions

As you proceed, you may use the controls at the bottom of this window to rewind, pause, or skip ahead during playback.

Welcome to the Eligibility-Based Billing Tutorial

Audience: Employers

Module Length: approx 13 minutes

Last Updated: 8/20/2007

Slide 3 - Slide 3

Text Captions

To move from one section to another, click the menu buttons found above the playback controls.

Welcome to the Eligibility-Based Billing Tutorial

Audience: Employers

Module Length: approx 13 minutes

Last Updated: 8/20/2007

Slide 4 - Slide 4

Text Captions

Also, please note that your screens may be a bit different from the ones you'll see in this tutorial. The difference depends on your contractual agreement.

Welcome to the Eligibility-Based Billing Tutorial

Audience: Employers

Module Length: approx 13 minutes

Last Updated: 8/20/2007

Slide 5 - Slide 5

Text Captions

Finally, remember that all sample information you'll see in this tutorial is fictitious. Any resemblance to existing individuals or companies is purely coincidental.

Welcome to the Eligibility-Based Billing Tutorial

Audience: Employers

Module Length: approx 13 minutes

Last Updated: 8/20/2007

Slide 6 - Slide 6

Text Captions

To locate an invoice, roll your mouse over the Billing menu option to view the Billing sub-menu.

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Slide 7 - Slide 7

Text Captions

Click the Account Summary menu option.

Slide 8 - Slide 8

Text Captions

The Account Summary screen displays an overview of your account status. In the upper right corner of this screen, you will see basic information regarding your next payment.

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Slide 9 - Slide 9

Text Captions

Below, a table lists your current open invoices. Sort the list of invoices by clicking on any column header.

Slide 10 - Slide 10

Text Captions

You can filter your results by clicking on the funnel-shaped filter icon next to each column heading. Results matching your search criteria will then display.

Slide 11 - Slide 11

Text Captions

To retrieve additional information about a particular invoice, click the invoice number link.

Slide 12 - Slide 12

Text Captions

The Invoice Summary screen displays. Invoice details are listed by coverage type.

Slide 13 - Slide 13

Text Captions

To view invoice information at the employee level, click on any blue underlined entry in the Description column.

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Slide 14 - Slide 14

Text Captions

A list of employee coverage information displays, including Policy Number and Charge Amounts.

Slide 15 - Slide 15

Text Captions

You can download a copy of an invoice for your records by clicking the Download Invoice link under Options. This option is available on both the Invoice Summary and Invoice Detail screens.

Slide 16 - Slide 16

Text Captions

To return to the Invoice Summary screen, click the Back button.

Slide 17 - Slide 17

Text Captions

To return to the Account Summary screen, click the Back button.

Slide 18 - Slide 18

Text Captions

To pay one or more invoices, select its checkbox under the Pay Invoice column. To pay all open invoices, click the Select All button. Next, click the Pay Selected Invoice button.

Slide 19 - Slide 19

Text Captions

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Slide 4 - Slide 4

Text Captions

The Payment screen lists the payment amounts for each selected invoice. Verify that the amounts are correct. To change the payment amount for an invoice, enter the correct amount in the Amount Paid field.

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Slide 5 - Slide 5

Text Captions

The Payment screen lists the payment amounts for each selected invoice. Verify that the amounts are correct. To change the payment amount for an invoice, enter the correct amount in the Amount Paid field.

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Slide 6 - Slide 6

Text Captions

If the payment does not equal the amount due for an invoice, provide an explanation by selecting an appropriate Reason Code.

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Slide 7 - Slide 7

Text Captions

If the payment does not equal the amount due for an invoice, provide an explanation by selecting an appropriate Reason Code.

Slide 8 - Slide 8

Text Captions

If the payment does not equal the amount due for an invoice, provide an explanation by selecting an appropriate Reason Code.

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Slide 9 - Slide 9

Text Captions

If the payment does not equal the amount due for an invoice, provide an explanation by selecting an appropriate Reason Code.

Slide 10 - Slide 10

Text Captions

Verify the payment account number listed is the correct account you want to pay.

Slide 11 - Slide 11

Text Captions

Verify the payment account number listed is the correct account you want to pay.

Slide 12 - Slide 12

Text Captions

Verify the payment date, the default is 'today's date'. To schedule a payment for a future date, enter the date manually or click the calendar icon to select the desired date.

Slide 13 - Slide 13

Text Captions

Note that payments submitted after 5PM Eastern Time will be processed on the next business day.

Slide 14 - Slide 14

Text Captions

Click the Continue button.

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Slide 15 - Slide 15

Text Captions

The Verify Payment Information page displays. Once again, verify that the information you see is correct. When finished, click Continue to submit the payment.

Slide 32 - Slide 32

Text Captions

The Payment Scheduled Successfully screen confirms that you have scheduled your payment successfully.

Slide 33 - Slide 33

Text Captions

It is advisable to print this screen for your records. Do this by clicking the Print button. Click the Return to Account Summary button.

Slide 34 - Slide 34

Text Captions

The Payment Pending field now displays an 'X' for invoices with a scheduled payment. This marker will remain until the payment debit occurs.

Slide 35 - Slide 35

Text Captions

To make an adjustment to an invoice, click any List Invoice number from the Account Summary screen. Note, List Adjustment Invoices are not eligible for adjusting.

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Slide 36 - Slide 36

Text Captions

From the Invoice Summary screen, click the Request Adjustment button.

Slide 37 - Slide 37

Text Captions

A dialog box will diplay, emphasizing that this request can only be made once, and only for the current billing period. Click OK to continue.

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Slide 38 - Slide 38

Text Captions

A confirmation notice displays, which states that you will receive an e-mail in 2-3 business days, notifying you that your Adjustment Invoice is available for viewing. Click the Back button to exit this window.

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Slide 39 - Slide 39

Text Captions

You return to the Invoice Summary screen. Click the Back button again to go to the Account Summary screen.

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Slide 40 - Slide 40

Text Captions

An 'X' will appear in the Adjustment Pending column to mark the appropriate invoice.

Slide 41 - Slide 41

Text Captions

To access Payment History, select the Payment History menu option.

Slide 42 - Slide 42

Text Captions

The Payment History screen displays. You can view up to 13 months of past transactions, including drafts, wires or checks that have been applied to your account.

Slide 43 - Slide 43

Text Captions

For each transaction, you will find information such as the payment date, the date received, the account used to fund the transaction, and the current payment status.

Slide 44 - Slide 44

Text Captions

Sort transactions by clicking on any column heading. Filter your results by selecting the 'filter' icon found beside each column heading. Hit Apply to enable the filter or Cancel to exit.

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Slide 45 - Slide 45

Text Captions

Sort transactions by clicking on any column heading. Filter your results by selecting the 'filter' icon found beside each column heading.

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Slide 46 - Slide 46

Text Captions

Click on a Payment ID link to view the details of that payment.

Slide 47 - Slide 47

Text Captions

The Payment Detail screen displays. Note for Pay Online payment types you can modify or cancel payments in scheduled status.

Slide 48 - Slide 48

Text Captions

To add a payment account, select the Edit Payment Method menu option.

Slide 49 - Slide 49

Text Captions

To add a payment account, select the Edit Payment Method menu option.

Slide 50 - Slide 50

Text Captions

The Edit Payment Method screen diplays all of your active payment accounts. Sort this list by clicking on any of the column headings.

Slide 51 - Slide 51

Text Captions

To add a new payment account, click the Add button.

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Slide 52 - Slide 52

Text Captions

You will be asked to confirm that the payment information you will provide is accurate. Click the 'I Agree' button to continue.

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Slide 53 - Slide 53

Text Captions

The Edit Payment Account Information screen displays. First-time users need to set up the debit detail by first entering a description.

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Slide 54 - Slide 54

Text Captions

The Edit Payment Account Information screen displays. First-time users need to set up the debit detail by first entering a description.

Slide 55 - Slide 55

Text Captions

Select the Payment Type. The Pay Online option requires you to initiate and approve payments monthly. The Scheduled Direct Debit option allows your payment to be processed automatically each month.

Slide 56 - Slide 56

Text Captions

Pay Online transfers are effective immediately, Scheduled Direct Debit transfers take effect the following month.

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Slide 57 - Slide 57

Text Captions

Notice Checking is the only Account Type available. Enter the Transit Number of the account.

Slide 58 - Slide 58

Text Captions

Enter the Account Number.

Slide 59 - Slide 59

Text Captions

Select the appropriate Billing Customer Number, Bill Group.

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Slide 60 - Slide 60

Text Captions

Click the Update button.

Slide 61 - Slide 61

Text Captions

The Edit Payment Account Information page displays. Pay Online transfers are effective immediately; Scheduled Direct Debit transfers take effect the following month. Verify your information and click OK.

Slide 62 - Slide 62

Text Captions

The Edit Payment Method List screen displays the account you have just added.

Slide 63 - Slide 63

Text Captions

To remove an account, select the account description from the Edit Payment Method List screen.

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Slide 64 - Slide 64

Text Captions

The Edit Payment Account Information screen displays. Click the Delete button to continue.

Slide 65 - Slide 65

Text Captions

A confirmation window asks you to verify that you want to delete the selected account. Click OK to continue.

Slide 66 - Slide 66

Text Captions

The Edit Payment Method List screen displays an updated list of your payment accounts.

Slide 67 - Slide 67

Text Captions

To update an account, click the account description you wish to edit.

Slide 68 - Slide 68

Text Captions

The Edit Payment Account Information screen displays. Make your desired updates. In this example we will change the Payment Type to Scheduled Direct Debit.

Slide 69 - Slide 69

Text Captions

The Edit Payment Account Information screen displays. Make your desired updates. In this example we will change the Payment Type to Scheduled Direct Debit.

Slide 70 - Slide 70

Text Captions

Click the Update button.

Slide 71 - Slide 71

Text Captions

Verify your updates and click OK to submit.

Slide 72 - Slide 72
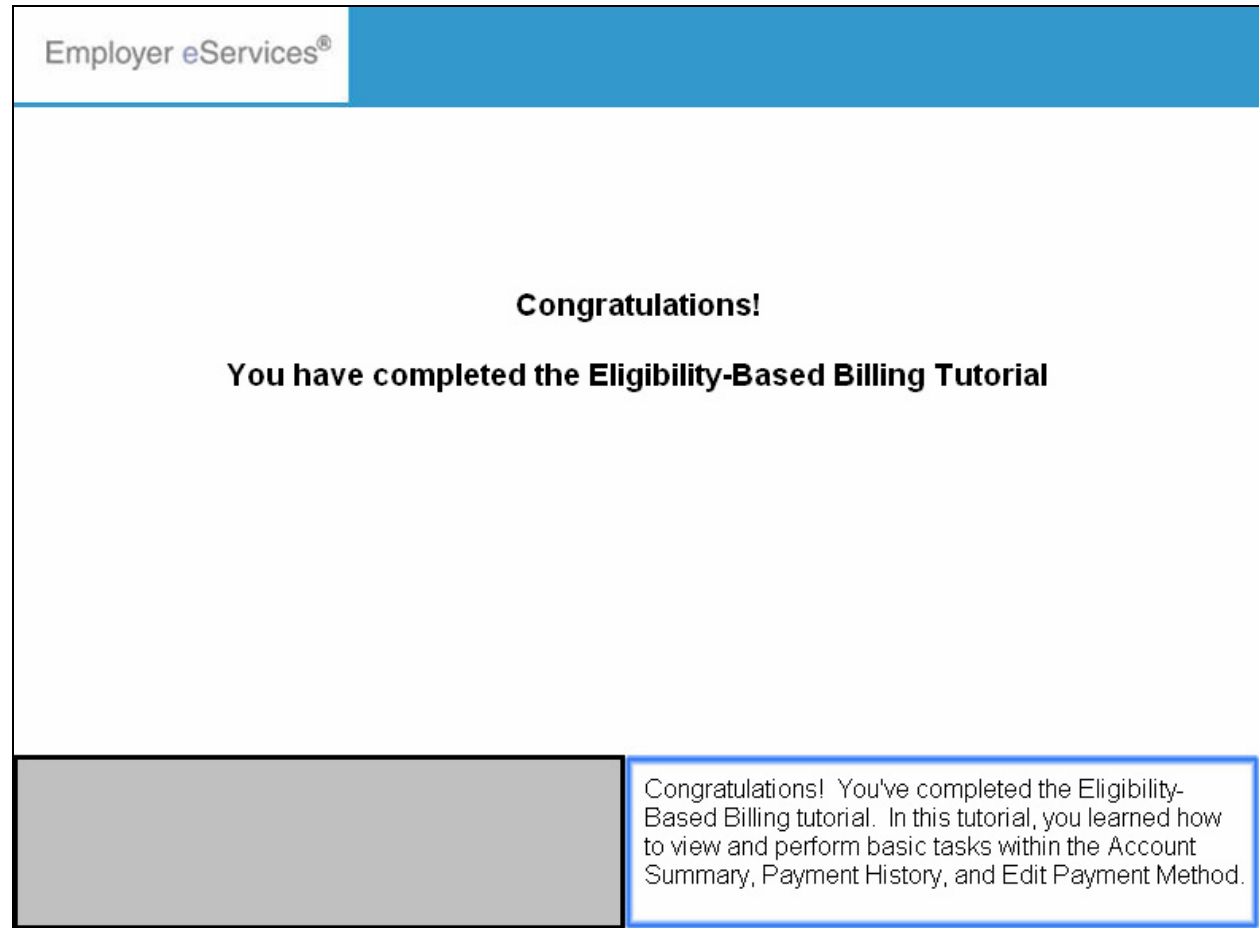
Text Captions

You will return to the Edit Payment Method List screen, which now displays the updated account information.

Slide 73 - Slide 73

Text Captions

Congratulations! You've completed the Eligibility-Based Billing tutorial. In this tutorial, you learned how to view and perform basic tasks within the Account Summary, Payment History, and Edit Payment Method.

Congratulations!

You have completed the Eligibility-Based Billing Tutorial