

Employer eServices®

**Welcome to the Terminate an Enrollee Tutorial**

**Audience:** Employers

**Module Length:** 5 minutes

**Last Updated:** 5/30/2007

Welcome to the Terminate an Enrollee tutorial. In this tutorial, you'll learn how to terminate an enrollee's coverage. Keep in mind that an "enrollee" may be an employee or an employee's dependent.

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Employer eServices®

**Welcome to the Terminate an Enrollee Tutorial**

**Audience:** Employers

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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.

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Employer eServices®

**Welcome to the Terminate an Enrollee Tutorial**

**Audience:** Employers  
**Module Length:** 5 minutes  
**Last Updated:** 5/30/2007

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

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## Terminate an Enrollee

The screenshot shows the Employer eServices website. At the top, the title "Employer eServices<sup>sm</sup>" is displayed. Below it is a navigation menu with the following items: "ID Cards", "Claims", "Billing", "Reports", "Banking", "ManageAccess", "Help", "Training", and "Tutorials". A "Log Out" button is located on the right side of the menu. A red box highlights the "Enrollment" option in the menu, with a callout box pointing to it that says "Select Enrollment option".

The main content area features a "Welcome CMA," message, followed by a brief description of the website's purpose. Below this is a "Hot Topics!" section with a link to "UnitedHealth Group Signs Agreement to Acquire Sierra Health Services".

The page is divided into three columns of links:

- Resources:** Administrative Guides, Benefit Plan Coverage Documents, Brochures and Forms, Communication Resource Center, Contact Us, Help, myuhc.com, Other Resources, Oxford Health Web Site, SAS 70.
- Network Information:** Network Changes, Network Fact Sheets, Network Maps, Provider Directory - UHC, UnitedHealth Premium Designation Program.
- Programs and Services:** Behavioral Health, Care Coordination, Care24, Definity HRA, Healthy Pregnancy Program, Specialized Networks, UnitedHealthcare Extras.

At the bottom of the page, there is a disclaimer: "By using this web site you agree to our [Internet Service Agreement](#) [Contact Us](#)". Below that, it states: "This is a private web site containing confidential information. Authorized site use of the web site and / or the data contained on the site may be grounds for penalty."

A callout box at the bottom right of the screenshot contains the text: "To begin, roll you cursor over or select the Enrollment option on the menu bar."

To begin, roll you cursor over or select the Enrollment option on the menu bar.

## Terminate an Enrollee

The screenshot shows the Employer eServices website interface. At the top, there is a navigation bar with the following links: **Enrollment**, ID Cards, Claims, Billing, Reports, Banking, ManageAccess, Help, Training, and Tutorials. Below this is a secondary menu with links: Add, **Highlight Box**, Reinstatement, Change, Inquire, and Electronic File. A 'Log Out' button is located on the right side of this menu. The main content area features a 'Welcome' message, a brief description of the service, and a 'Hot Topics!' section with a link to 'UnitedHealth Group Signs Agreement to Acquire Sierra Health Services'. Below this are three columns of links: 'Resources' (Administrative Guides, Benefit Plan Coverage Documents, Brochures and Forms, Communication Resource Center, Contact Us, Help, myuhc.com, Other Resources, Oxford Health Web Site, SAS 70), 'Network Information' (Network Changes, Network Fact Sheets, Network Maps, Provider Directory - UHC, UnitedHealth Premium Designation Program), and 'Programs and Services' (Behavioral Health, Care Coordination, Care24, Definity HRA, Healthy Pregnancy Program, Specialized Networks, UnitedHealthcare Extras). At the bottom, there is a disclaimer: 'By using this web site you agree to our [Internet Service Agreement](#) [Contact Us](#). This is a private web site containing confidential information. Authorized site use of the web site and / or the data contained on the site may be grounds for penalty.'

Select the Terminate menu option.

## Terminate an Enrollee

Employer eServices<sup>sm</sup>

[Enrollment](#) [ID Cards](#) [Claims](#) [Billing](#) [Reports](#) [Banking](#) [ManageAccess](#) [Help](#) [Training](#) [Tutorials](#)

Add [Terminate](#) [Reinstate](#) [Change](#) [Inquire](#) [Electronic File](#) [Log Out](#)

Scroll Up - U Scroll Down - D

**Select Group from list, enter Employee Search criteria and select Search.**

Select Group

Employee Search  By Employee ID  (SSN or Alternate ID)

By Last Name  First Initial  [Search](#)

Select Enrollee

[Help](#) [Continue](#)

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If your company has 20 or more groups, and if no groups were previously selected, you will be taken to the Group Select screen first. For more information about Group Select, refer to the Group Select tutorial.

If your company has 20 or more groups, and if no groups were previously selected, you will be taken to the Group Select screen first. For more information about Group Select, refer to the Group Select tutorial.

## Terminate an Enrollee

Employer eServices<sup>sm</sup>

Enrollment ID Cards Claims Billing Reports Banking ManageAccess Help Training Tutorials

Add Terminate Reinstatement Change Inquire Electronic File Log Out

Scroll Up - U Scroll Down - D

Select Group from list, enter Employee Search criteria and select Search.

Select Group (Select Group)

Employee Search  By Employee ID

By Last Name   Search

Select Enrollee

Help Continue

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To terminate an enrollee, you first need to identify the group, the employee, and the enrollee. Start by selecting a group within the Select Group drop down menu.

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## Terminate an Enrollee

Employer eServices<sup>sm</sup>

Enrollment ID Cards Claims Billing Reports Banking ManageAccess Help Training Tutorials

Add **Terminate** Reinstatement Change Inquire Electronic File Log Out

Scroll Up - U Scroll Down - D

Select Group from list, enter Employee Search criteria and select Search.

Select Group (Select Group)

Employee Search REED'S BUSINESS 0231110 (SSN or Alternate ID)  
SAMPLE COMPANY 9990089  
UEST CUSTOMER 9999999

Select Enrollee By Last Name First Initial Search

Help Continue

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The Select Group drop-down menu appears and displays the list of groups currently available. Select the appropriate group.

The Select Group drop-down menu appears and displays the list of groups currently available. Select the appropriate group.



## Terminate an Enrollee

Next, identify the employee. There are 2 ways to search for an employee: By Employee ID or By Last Name. We will demonstrate the default search method, By Employee ID.

## Terminate an Enrollee

Employer eServices<sup>sm</sup>

**Enrollment** ID Cards Claims Billing Reports Banking ManageAccess Help Training Tutorials

Add **Terminate** Reinstatement Change Inquire Electronic File Log Out

Scroll Up - U Scroll Down - D

**Select Group from list, enter Employee Search criteria and select Search.**

Select Group:

Employee Search:  By Employee ID  (SSN or Alternate ID)

By Last Name  First Initial

Select Enrollee:

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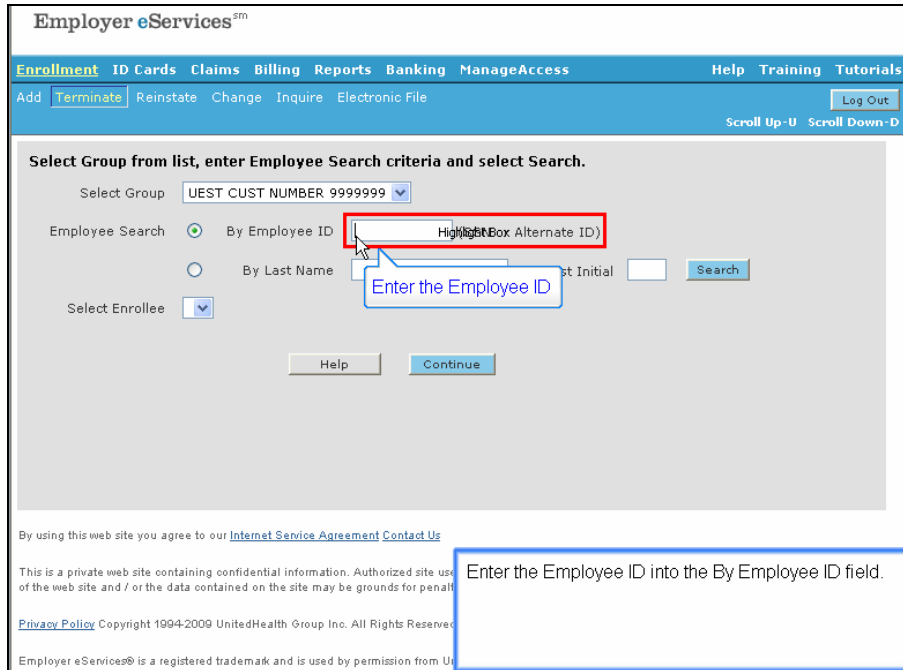
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Notice the By Employee radio button is already selected.

Notice the By Employee radio button is already selected.

## Terminate an Enrollee



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**Enrollment** ID Cards Claims Billing Reports Banking ManageAccess Help Training Tutorials

Add **Terminate** Reinstatement Change Inquire Electronic File Log Out

Scroll Up - U Scroll Down - D

Select Group from list, enter Employee Search criteria and select Search.

Select Group UEST CUST NUMBER 9999999

Employee Search  By Employee ID

By Last Name

Select Enrollee

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Enter the Employee ID into the By Employee ID field.

Enter the Employee ID into the By Employee ID field.

## Terminate an Enrollee

Click the Search button.

## Terminate an Enrollee

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Enrollment ID Cards Claims Billing Reports Banking ManageAccess Help Training Tutorials

Add **Terminate** Reinstatement Change Inquire Electronic File Log Out

Scroll Up - U Scroll Down - D

Select Group from list, enter Employee Search criteria and select Search.

Select Group UEST CUST NUMBER 9999999

Employee Search  By Employee ID 336699002 (SSN or Alternate ID)

By Last Name [ ] First Initial [ ] Search

Select Enrollee DOE, JOHN (Employee) 00336699002

Help

Click the **Select Enrollee** drop down menu

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When the employee search is complete, the results that match the search criteria will appear in the Select Enrollee drop down menu. Select the appropriate enrollee.

When the employee search is complete, the results that match the search criteria will appear in the Select Enrollee drop down menu. Select the appropriate enrollee.

## Terminate an Enrollee

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[Enrollment](#) [ID Cards](#) [Claims](#) [Billing](#) [Reports](#) [Banking](#) [ManageAccess](#) [Help](#) [Training](#) [Tutorials](#)

Add [Terminate](#) [Reinstate](#) [Change](#) [Inquire](#) [Electronic File](#) [Log Out](#)

Scroll Up - U Scroll Down - D

Select Group from list, enter Employee Search criteria and select Search.

Select Group UEST CUST NUMBER 9999999

Employee Search  By Employee ID 336699002 (SSN or Alternate ID)  
 By Last Name  First Initial  [Search](#)

Select Enrollee  
DOE, JOHN (Employee) 00336699002  
DOE, JOHN (Employee) 00336699002  
DOE, JANE (Spouse) 123456789  
DOE, JILL (Child) 987654321

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Note the Select Enrollee drop down menu lists the employee's name as well as the employee's covered dependents.

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## Terminate an Enrollee

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Enrollment ID Cards Claims Billing Reports Banking ManageAccess Help Training Tutorials

Add **Terminate** Reinstatement Change Inquire Electronic File Log Out

Scroll Up - U Scroll Down - D

Select Group from list, enter Employee Search criteria and select Search.

Select Group UEST CUST NUMBER 9999999

Employee Search  By Employee ID 336699002 (SSN or Alternate ID)

By Last Name  First Initial  Search

Select Enrollee

DOE, JOHN (Employee) 00336699002
<b>DOE, JOHN (Employee) 00336699002</b>
DOE, JANE (Spouse) 123456789
DOE, JILL (Child) 987654321

Select the appropriate enrollee

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You can terminate coverage of a dependent without terminating coverage for an employee. However, when you terminate coverage for an employee, coverage for all dependents is automatically terminated as well.

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## Terminate an Enrollee

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Enrollment ID Cards Claims Billing Reports Banking ManageAccess Help Training Tutorials

Add **Terminate** Reinstate Change Inquire Electronic File Log Out

Scroll Up - U Scroll Down - D

Select Group from list, enter Employee Search criteria and select Search.

Select Group UEST CUST NUMBER 9999999

Employee Search  By Employee ID 336699002 (SSN or Alternate ID)

By Last Name First Initial Search

Select Enrollee DOE, JOHN (Employee) 00336699002

Help Highlight

Click the Continue button.

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Click the Continue button.

Click the Continue button.



## Terminate an Enrollee

The screenshot displays the 'Employer eServices' web interface. At the top, there is a navigation menu with options: Enrollment, ID Cards, Claims, Billing, Reports, Banking, ManageAccess, Help, Training, and Tutorials. Below this is a secondary menu with 'Add', 'Terminate', 'Reinstate', 'Change', 'Inquire', and 'Electronic File'. A 'Log Out' button is located on the right side of the secondary menu. The main content area is titled 'Terminate [Dependent or Employee]'. It features a header bar with the following information: Enrollee: JOHN DOE, Group: 9999999, Insured ID: 00336699002-00. Below the header, there is a form with the following fields: 'Termination Date \*' with a date picker (MM/DD/CCYY), and 'Termination Reason \*' with a dropdown menu. There are 'Help' and 'Terminate' buttons. A text box on the right side of the form contains the following text: 'The Terminate Enrollee screen appears. Notice that the enrollee name, group, and insured ID number appears at the top of the screen.'

The Terminate Enrollee screen appears. Notice that the enrollee name, group, and insured ID number appears at the top of the screen.

## Terminate an Enrollee

Employer eServices<sup>SM</sup>

Enrollment ID Cards Claims Billing Reports Banking ManageAccess Help Training Tutorials

Add **Terminate** Reinstater Change Inquire Electronic File Log Out

Scroll Up - U Scroll Down - D

Enrollee: JOHN DOE Group: 9999999 Insured ID: 00336699002-00

**Terminate [Dependent or Employee]**

Enter termination date and reason and select Terminate. \* Required Fields

Termination Date \* MM / DD / CCYY  
(470 x 53)

Termination Reason \* (X:38; Y:231)

Help Terminate

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It is required to enter the Termination Date and the Termination Reason. The Termination Date is the last effective date for the enrollee's coverage.

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## Terminate an Enrollee

Employer eServices<sup>SM</sup>

Enrollment ID Cards Claims Billing Reports Banking ManageAccess Help Training Tutorials

Add **Terminate** Reinstater Change Inquire Electronic File Log Out

Scroll Up - U Scroll Down - D

Enrollee: **JOHN DOE** Group: **9999999** Insured ID: **00336699002-00**

**Terminate [Dependent or Employee]**

Enter termination date and reason and select Terminate. \* Required Fields

Termination Date \*  /  /

Termination Reason \*

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If the enrollee is an employee, this is most likely not the same date as the last date of employment. If you are not sure of the date to enter, contact your eligibility analyst or other designated representative.

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## Terminate an Enrollee

Employer eServices<sup>sm</sup>

Enrollment ID Cards Claims Billing Reports Banking ManageAccess Help Training Tutorials

Add **Terminate** Reinstatement Change Inquire Electronic File Log Out

Scroll Up - U Scroll Down - D

Enrollee: JOHN DOE Group: 9999999 Insured ID: 00336699002-00

**Terminate [Dependent or Employee]**

Enter termination date and reason and select Terminate. \* Required Fields

Termination Date \*  /  /

Termination Reason \*

Help Terminate

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Enter the Termination Date.

Enter the Termination Date.

## Terminate an Enrollee

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Enrollment ID Cards Claims Billing Reports Banking ManageAccess Help Training Tutorials

Add **Terminate** Reinstatement Change Inquire Electronic File Log Out

Scroll Up - U Scroll Down - D

Enrollee: JOHN DOE Group: 9999999 Insured ID: 00336699002-00

**Terminate [Dependent or Employee]**

Enter termination date and reason and select Terminate. \* Required Fields

Termination Date \* 05 / 31 / 2007

Termination Reason \*

Help Terminate

Select the **Termination Reason** drop down menu

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Enter the reason for termination by selecting the Termination Reason from the drop down menu.

Enter the reason for termination by selecting the Termination Reason from the drop down menu.

## Terminate an Enrollee

Employer eServices<sup>sm</sup>

Enrollment ID Cards Claims Billing Reports Banking ManageAccess Help Training Tutorials

Add **Terminate** Reinstater Change Inquire Electronic File Log Out

Scroll Up - U Scroll Down - D

Enrollee: JOHN DOE Group: 9999999 Insured ID: 00336699002-00

**Terminate [Dependent or Employee]**

Enter termination date and reason and select Terminate. *\* Required Fields*

Termination Date \* 05 / 31 / 2007

Termination Reason \*

TERMED EMPLOYMENT  
EMPLOYEE CANCELLED COVG  
DEATH (CERTIFICATE SENT FOR DEPENDENTS)  
CORRECTION, NO CERTIFICATE SENT

Select a Termination Reason

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Enter the reason for termination by selecting the Termination Reason from the drop down menu.

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## Terminate an Enrollee

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Enrollment ID Cards Claims Billing Reports Banking ManageAccess Help Training Tutorials

Add **Terminate** Reinstatement Change Inquire Electronic File Log Out

Scroll Up - U Scroll Down - D

Enrollee: JOHN DOE Group: 9999999 Insured ID: 00336699002-00

**Terminate [Dependent or Employee]**

Enter termination date and reason and select Terminate. *\* Required Fields*

Termination Date \* 05 / 31 / 2007

Termination Reason \* **TERMED EMPLOYMENT OR CANCELLED COVG**

Help **Terminate**

Click the **Terminate** button

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Click the Terminate button to complete the termination process.

Click the Terminate button to complete the termination process.

## Terminate an Enrollee

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Enrollment ID Cards Claims Billing Reports Banking ManageAccess Help Training Tutorials

Add Terminate Reinstatement Change **Inquire** Electronic File Log Out

Scroll Up - U Scroll Down - D

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Enrollee: **JOHN DOE**      Group: **9999999**      Insured ID: **00336699002-00**

<b>Employee Information</b>	Demographic Information	Product Information	Other Insurance
-----------------------------	-------------------------	---------------------	-----------------

**Employee Information**

Transaction Successful.

*\*Required fields*

Original Date of Hire\*       Date of Retirement

Date of Death

Complete Alternate Payee information only when the payee is not the employee.

Alternate Payee Indicator

Alternate Payee ID

Alt Payee Last Name

Alt Payee First Name

A Transaction Successful message will appear. If you receive an error message, follow the instructions to correct the error.

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## Terminate an Enrollee

Employer eServices<sup>sm</sup>

**Enrollment** ID Cards Claims Billing Reports Banking ManageAccess Help Training Tutorials

Add Terminate Reinstater Change **Inquire** Electronic File Log Out

Scroll Up - U Scroll Down - D

Enrollee: **JOHN DOE** Group: **9999999** Insured ID: **00336699002-00**

*\*Required fields*

Original Date of Hire\*  Date of Retirement

Date of Death

Complete Alternate Payee information only when the payee is not the employee.

Alternate Payee Indicator

Alternate Payee ID

Alt Payee Last Name

Alt Payee First Name

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Use the scroll bar to view the bottom of the page.

## Terminate an Enrollee

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Enrollment ID Cards Claims Billing Reports Banking ManageAccess Help Training Tutorials

Add Terminate Reinstater Change **Inquire** Electronic File Log Out

Scroll Up - U Scroll Down - D

Enrollee: **JOHN DOE** Group: **9999999** Insured ID: **00336699002-00**

*\*Required fields*

Original Date of Hire\*  Date of Retirement

Date of Death

Complete Alternate Payee information only when the payee is not the employee.

Alternate Payee Indicator

Alternate Payee ID

Alt Payee Last Name

Alt Payee First Name

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You can then click the Print button to print the entire enrollment record, or click the Continue button to Inquire about the employee.

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## Terminate an Enrollee

Employer eServices<sup>SM</sup>

**Enrollment** ID Cards Claims Billing Reports Banking ManageAccess Help Training Tutorials

Add Terminate Reinstater Change **Inquire** Electronic File Log Out

Scroll Up - U Scroll Down - D

---

Enrollee: **JOHN DOE** Group: **9999999** Insured ID: **00336699002-00**

*\*Required fields*

Original Date of Hire\*  Date of Retirement

Date of Death

Complete Alternate Payee information only when the payee is not the employee.

Alternate Payee Indicator

Alternate Payee ID

Alt Payee Last Name

Alt Payee First Name

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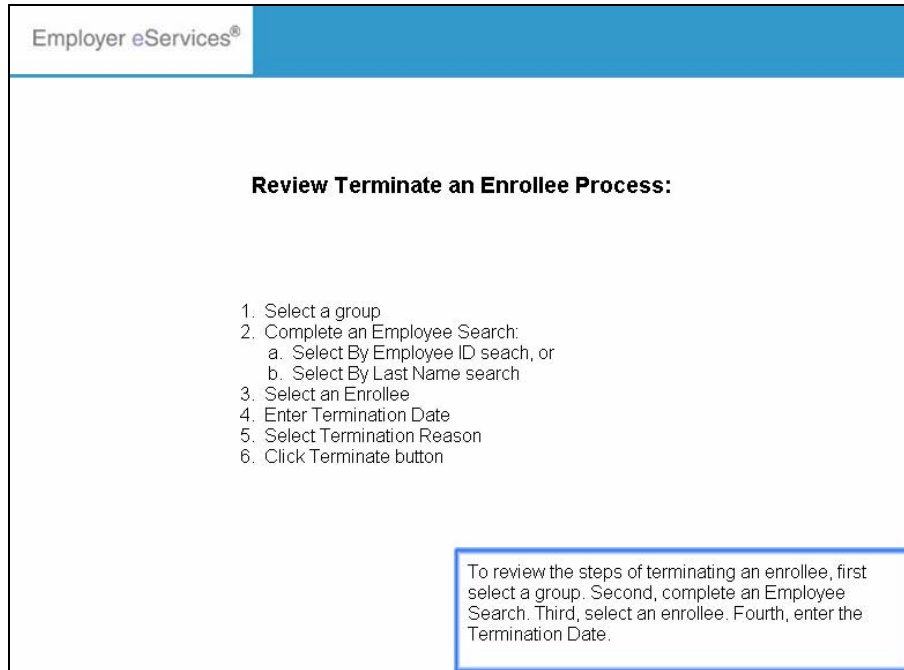
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If you still have questions about the termination process, you can click the Help button to go to the Training page.

If you still have questions about the termination process, you can click the Help button to go to the Training page.



The screenshot shows a web interface for 'Employer eServices®'. The main content area is titled 'Review Terminate an Enrollee Process:' and contains a numbered list of six steps. A callout box in the bottom right corner provides a summary of the process.

**Employer eServices®**

**Review Terminate an Enrollee Process:**

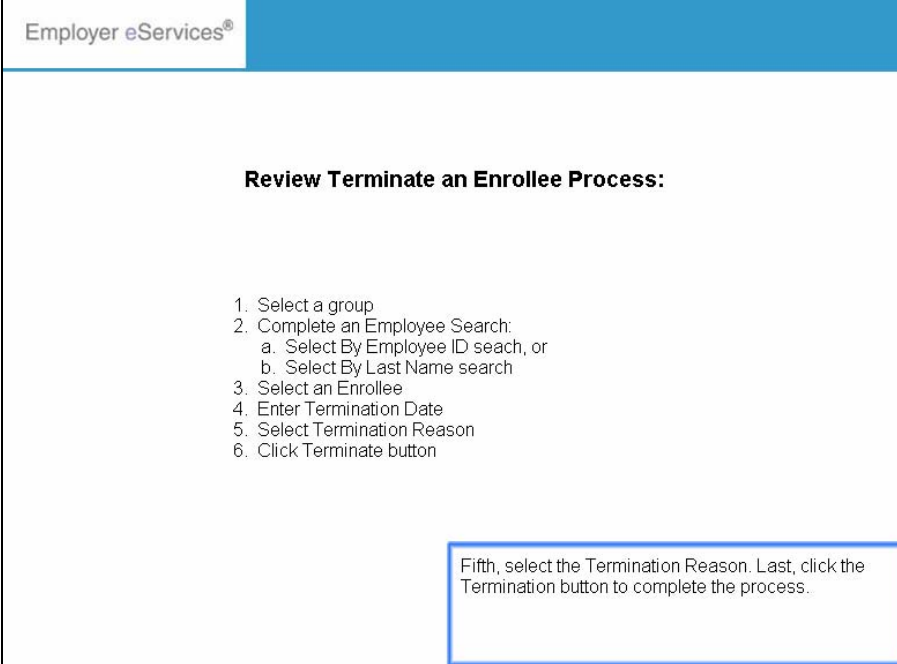
1. Select a group
2. Complete an Employee Search:
  - a. Select By Employee ID search, or
  - b. Select By Last Name search
3. Select an Enrollee
4. Enter Termination Date
5. Select Termination Reason
6. Click Terminate button

To review the steps of terminating an enrollee, first select a group. Second, complete an Employee Search. Third, select an enrollee. Fourth, enter the Termination Date.

To review the steps of terminating an enrollee, first select a group. Second, complete an Employee Search. Third, select an enrollee. Fourth, enter the Termination Date.

**Review Terminate an Enrollee Process:**

1. Select a group
2. Complete an Employee Search:
  - a. Select By Employee ID search, or
  - b. Select By Last Name search
3. Select an Enrollee
4. Enter Termination Date
5. Select Termination Reason
6. Click Terminate button

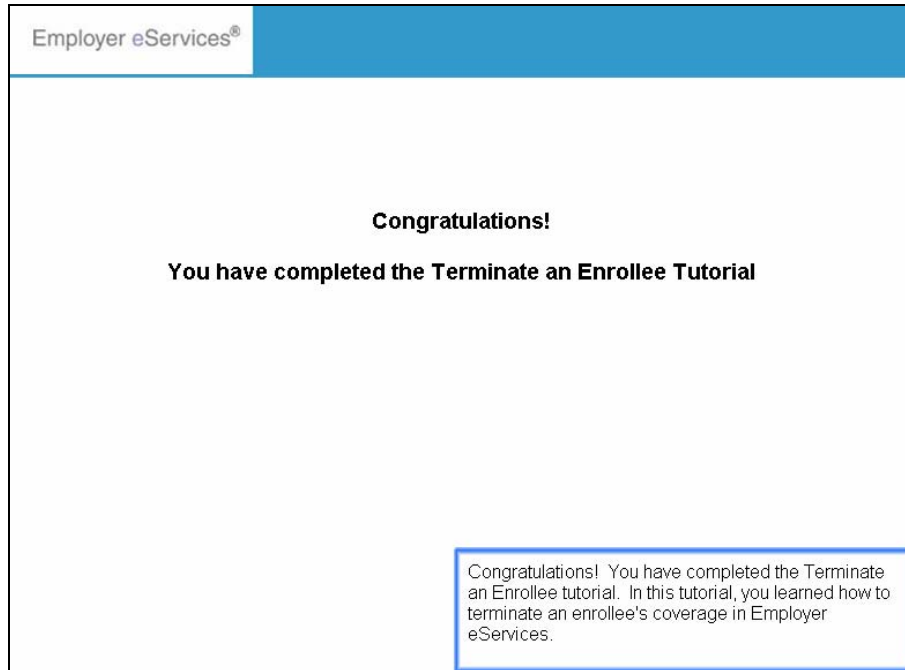


The screenshot shows a web interface for 'Employer eServices'. At the top left, the text 'Employer eServices®' is displayed. Below this, the heading 'Review Terminate an Enrollee Process:' is centered. A numbered list of six steps is provided: 1. Select a group; 2. Complete an Employee Search: a. Select By Employee ID search, or b. Select By Last Name search; 3. Select an Enrollee; 4. Enter Termination Date; 5. Select Termination Reason; 6. Click Terminate button. A blue-bordered box at the bottom right of the screenshot contains the text: 'Fifth, select the Termination Reason. Last, click the Termination button to complete the process.'

Fifth, select the Termination Reason. Last, click the Termination button to complete the process.

**Review Terminate an Enrollee Process:**

1. Select a group
2. Complete an Employee Search:
  - a. Select By Employee ID search, or
  - b. Select By Last Name search
3. Select an Enrollee
4. Enter Termination Date
5. Select Termination Reason
6. Click Terminate button



Congratulations! You have completed the Terminate an Enrollee tutorial. In this tutorial, you learned how to terminate an enrollee's coverage in Employer eServices.