

BENEFITFOCUS® UNIVERSITY

Benefitfocus eBilling™ User Guide

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Disclaimer

This resource includes images containing sample data to better illustrate the functionality of our software within the context of this course. All sample data displayed in the figures throughout this document is simulated, non-personal data.

About This Guide

This guide provides information on how to use Benefitfocus eBilling. eBilling is an electronic invoice presentment and payment solution, securely hosted for you to efficiently manage and pay your invoices online.

The chapters in this guide correspond to each of the tabs that appear in the main navigation bar on the left of each page of the eBilling application. See [Working with the eBilling Home Page](#) for additional information.

Note: Some features in this document may not be available to you, based on software settings established for your company and or security driven features within the application. Please contact your account representative if you have questions about your access.

This document may include the following icons to highlight additional information, warnings and suggestions:



The *document* icon references external documentation that is useful to further understand the information being presented.



The *note* icon provides additional or important information about special conditions, suggestions or actions that should be taken.



The *risk* icon is a warning, often cautioning against taking certain actions.



The *tip* icon provides additional, more efficient instructions when completing a task.

Chapter 1

eBilling Basics

This chapter provides information on the basics of working with the eBilling application and includes information on logging into the application, working with the eBilling user interface and managing your account information.

Getting Started with eBilling

After receiving your eBilling user credentials, you can refer to the information in this section to familiarize yourself with the eBilling user interface and basic system features.

Logging into eBilling

Follow the steps below to log into eBilling.

1. Go to the eBilling login page provided.
2. Enter your *Username* and *Password*.
3. Click *Log In*.



If you forget your *Username* or *Password*, you can request to have your credentials reset using the links on the login page.

A screenshot of the eBilling login page. It features a title "Log in to your account" with a lock icon. Below the title are two input fields: "Username*" and "Password*", each with a red asterisk. To the right of the "Password*" field is a blue "Log in" button. At the bottom of the form, there are two links: "Forgot your Username? >" and "Forgot your Password? >". The "Forgot your Password? >" link is highlighted with a red rectangular box.

The eBilling Home page displays.



Depending on your group's configuration, you may login through your provider's page (SSO) rather than logging in directly as described above. In this case, you will still be directed to the eBilling Home page as shown above.

If you login directly, the first time you login you will be prompted to update your password and security questions before proceeding.

Working with the eBilling Home Page

On the *Home page*, you can access a number of the major features of the eBilling application, including:

- Making payments
- Printing invoices
- Viewing invoice details

Quickly navigate the eBilling application using the tabs on the navigation bar.

national Carrie Client

Home

Your Current 02/01/2017 Invoices

Lane's Advertising
789012345

\$15,646.37
Total Amount Due

Payment Due Date: 02/01/2017
Invoice Date: 01/15/2017
Billing Period: 02/01/2017-02/28/2017

Make a Payment Print Invoices View Consolidated Details

Stop Paper
You may elect to stop receiving paper invoices in the mail.
Go Paperless

Messages
For system maintenance, the application will be unavailable during the times listed below.
Thursday, September 21st 11:00 PM until 1:00 AM EST

Search for and view current invoices, adjustments and payment history on the *Billing* tab.

national Carrie Client

View Invoices

View Invoices
Search Invoices
Adjustments
Payment History

Invoice Level Search

Subgroup #

Submit Reset

Your Current Invoices View Submit

1 Items | 1-1

Invoice Level	Subgroup #	Billing Period	Invoice #	Invoice Date	Payment Due Date	Total Amount Due
Options	+ 789012345	02/01/2017-02/28/2017		01/15/2017	02/01/2017	\$15,646.37

1 Items | 1-1

Create, view and schedule reports on the *Reports* tab.

national Carrie Client

Create Reports

Create Reports
Completed Reports
Scheduled Reports

Skip to Invoice Reports | Payment Reports

Invoice Reports

Options Advanced Print Invoice Report Invoice Report for Premium or Claims Invoices.

Options Current Invoices A report detailing all current invoices for the Client.

Options Reconciliation Adjustment Report A report detailing reconciliation adjustments

Back to Top

Payment Reports

Options Payment Report A report detailing all payments.

Options Scheduled Payment Report A report detailing all scheduled payments.

Back to Top

Set up payment accounts and manage user accounts on the *Setup* tab.

The screenshot shows the 'Payment Accounts' page. On the left is a sidebar with icons for Home, Billing, Reports, and Setup. The main header area includes the 'national' logo and a user profile 'Carrie Client'. Below the header, there's a 'Payment Accounts' section with a 'Create Payment Account' button. A table lists existing accounts:

Account Type	Account Name	Status	Default	Auto-Draft Enabled	Create Date
Bank Account	Test Bank Account	Enabled		Yes	02/09/2017

The *Home Page* also includes additional sections for quick access to messages, payments, scheduled reports and users.

The screenshot shows the 'Home' page. The sidebar on the left has icons for Home, Billing, Reports, and Setup. The main content area is titled 'Home' and includes a section for 'Your Current 02/01/2017 Invoices'. An invoice for 'Lane's Advertising' is displayed with a total amount due of \$15,646.37. A red arrow points to this amount. To the right, there are several quick-action boxes: 'Stop Paper', 'Messages' (highlighted with a red border), 'Payments', 'Scheduled Reports', and 'Users'. The 'Messages' box contains a system maintenance notice. The 'Payments' box includes links for 'Payment History', 'Pending Payments', and 'Payment Accounts'. The 'Scheduled Reports' box has links for 'Scheduled Reports' and 'Create Report'. The 'Users' box has links for 'Manage Users' and 'Create Users'.

The *Messages* area displays important information and instructions. This may include system messages alerting you to any planned application downtime for maintenance or messages from your carrier.

Messages

For system maintenance, the application will be unavailable during the times listed below.

- **Thursday, October 5 from 11:00 PM to 01:00 AM EST**

We are sorry for the inconvenience, and we thank you for your patience.

Quickly access payment history, pending payments and payment account information in the *Payments* area.

Payments

Search and review your recent payments

[Payment History](#)

View your pending payments

[Pending Payments](#)

View your payment accounts

[Payment Accounts](#)

View or create reports from the *Scheduled Reports* area.

Scheduled Reports

View your scheduled reports

[Scheduled Reports](#)

Create a new scheduled report

[Create Report](#)

Create and manage eBilling user accounts in the *Users* area.

Users

Search and edit your user accounts

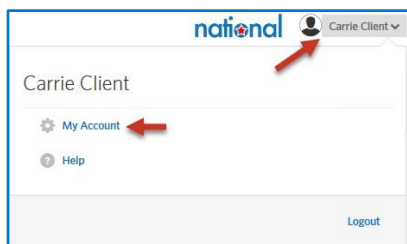
[Manage Users](#)

Create a new user

[Create Users](#)

Updating Your Account Settings

Update your user account settings to change your notification preferences, password and security questions. To update your user account, click the user profile menu in the upper right corner then select *My Account*.



The *My Account Settings* page displays.

My Account Settings

* Email

carrie.client@email.com

To ensure timely notifications of new invoices and important system information, an email address is required.

Old Password

New Password

Confirm New Password

Secret Question 1

What was the last name of your third grade teacher?

Secret Answer 1

Secret Question 2

Where did your parents meet?

Secret Answer 2

Secret Question 3

What was the first thing you learned to cook?

Secret Answer 3

Save

Cancel

Update your preferred email address, password and/or security questions as desired, then click *Save*.

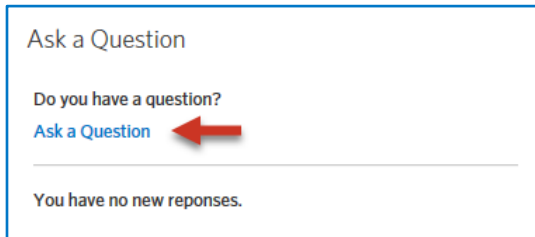
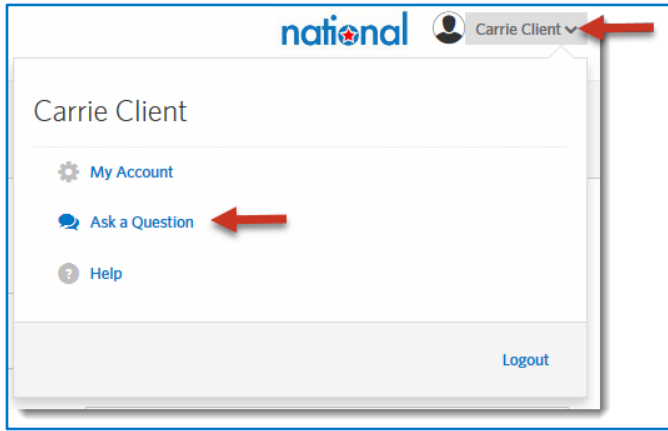
Asking and Reviewing Questions

If enabled, the *Ask a Question* feature allows you to communicate securely with a carrier service representative within eBilling.

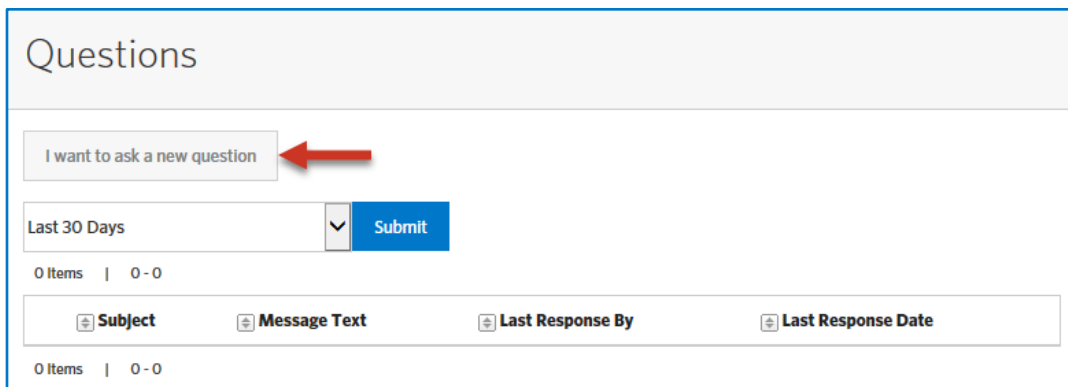
Asking a Question

Follow the steps below to ask your carrier a question.

1. Select the *Ask a Question* link from the user profile menu in the upper right corner of any page or from the *Ask a Question* section on the Home page.



2. Select the *I want to ask a new question* button on the *Questions* page.



3. Enter your question in the *Question* field and enter any other required information.

Ask a Question

Use the form below to submit your question. Responses from your carrier will appear in a bold font.

Ask a Question

Subject*

Original Date

Last Response Date

Last Response By

Send to

Question*

- Click **Submit** at the end of the page. You are returned to the *Questions* page. Your question will be added to the list of questions.

Questions

Last 30 Days

1 Items | 1-1

	Subject	Message Text	Last Response By	Last Response Date
Options	Sample Question	Q: This is a sample question.	Carrie Client	10/05/2017

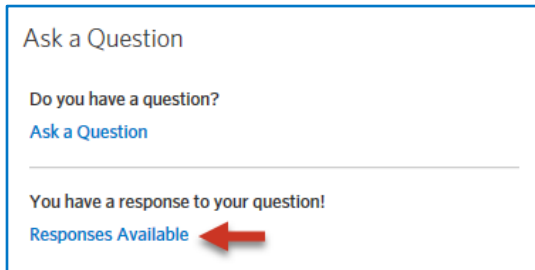
1 Items | 1-1

- (Optional) Select *Options* for the question to *Edit* or *Delete* your question. If you delete a question, the carrier representative will no longer be able to see your question.

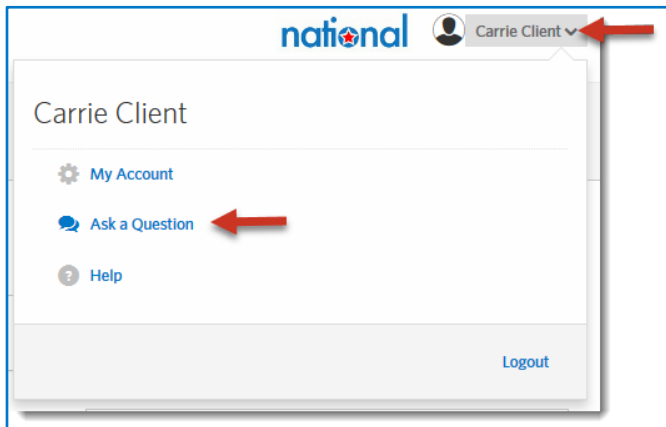
Reviewing a Question Response

Once the carrier responds, a *Responses Available* link will appear in the *Ask a Question* section of the Home page. To review the carrier representative response, follow the steps below.

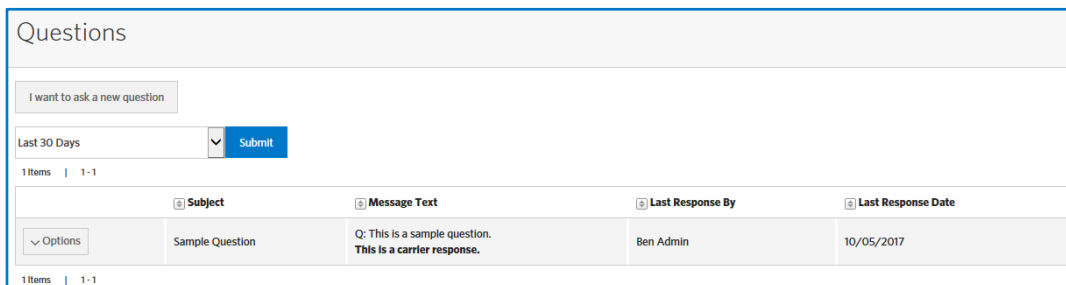
- Select the *Responses Available* link on the Home page.



You can also select the *Ask a Question* link from the user profile menu in the upper right corner of any page or from the *Ask a Question* section on the Home page.



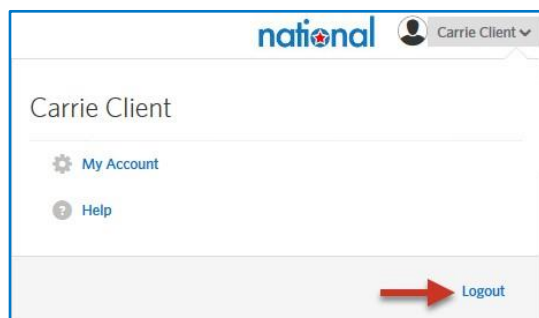
2. Read the response from the carrier representative. Responses will appear in bold font below the question in the *Message Text* column.



3. (Optional) Select the *Options* button to *Reply* to the carrier representative or to *Delete* the question.

Logging out of eBilling

To log out of eBilling, click the user profile menu in the upper right corner, then select *Logout*.



Going Paperless

If you prefer, you can choose to stop receiving paper invoices. After electing to go paperless, you must contact your carrier to re-establish paper billing.

Follow the steps below to go paperless.

1. On the Home page, click the *Go Paperless* link in the *Stop Paper* section.

Home

Your Current 02/01/2017 Invoices

Lane's Advertising
789012345

\$15,646.37
Total Amount Due

Payment Due Date: 02/01/2017
Invoice Date: 01/15/2017
Billing Period: 02/01/2017-02/28/2017

Make a Payment Print Invoices View Consolidated Details

Individual Invoices (2) Show Individual Invoices

Stop Paper

You may elect to stop receiving paper invoices in the mail.

Go Paperless

Messages

For system maintenance, the application will be unavailable during the times listed below.

- Thursday, September 21st 11:00 PM until 1:00 AM EST

We are sorry for the inconvenience, and we thank you for your patience.

Payments

The *Stop Paper Invoices* page displays.

Stop Paper Invoices

Select the method for turning off paper invoices.

Please Note: To stop paper invoices, you must have a valid email address associated with your account. You may add or update your email address in the [My Account](#) section.

Your email: carrie.client@email.com

☒ Turn off paper invoices for all invoice levels.

☐ Turn off paper invoices for the following invoice levels:

System: Group Billing Only invoice levels that receive paper are displayed below

2 items | 1-2

	Group #	Subgroup #
☐	789012345	0001
☐	789012345	0002

2 items | 1-2

Save Cancel

2. Choose whether you would like to disable all your paper invoices or if you would like to select specific accounts to be paperless:
 - a. Select *Turn off paper invoices for all invoice levels* to disable paper invoices for all accounts.
 - b. Select *Turn off paper invoices for the following invoices levels* to enable a selection list of all accounts that are still receiving paper invoices. Place a check in the checkbox for each invoice grouping that should no longer receive paper invoices.

Stop Paper Invoices

Select the method for turning off paper invoices.

Please Note: To stop paper invoices, you must have a valid email address associated with your account. You may add or update your email address in the [My Account](#) section.

Your email: carrie.client@email.com

☐ Turn off paper invoices for all invoice levels.
☒ Turn off paper invoices for the following invoice levels:

System: Group Billing ▼ **Only invoice levels that receive paper are displayed below**

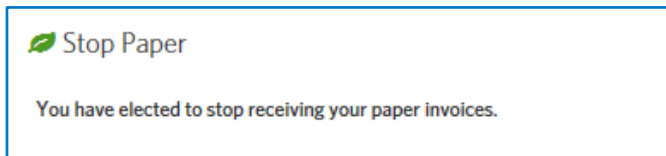
2 Items | 1 - 2

	Group #	Subgroup #
☒	789012345	0001
☐	789012345	0002

2 Items | 1 - 2

Save Cancel

- Click **Save**. The *Home* page displays a message indicating that you are participating in online billing.



If you do not disable paper for all invoice levels, the option to *Go paperless* will remain available on the *Home* page.

Chapter 2

Billing

By default, your current invoices are displayed on the *Home* page. You can view additional invoices and invoice information on the *Billing* tab, however, which also enables you to search for invoices, adjustments and view your payment history.

Invoice Level	Subgroup #	Billing Period	Invoice #	Invoice Date	Payment Due Date	Total Amount Due
+789012345		02/01/2017-02/28/2017		01/15/2017	02/01/2017	\$15,646.37

Viewing Invoices

The *View Invoices* page provides you with at-a-glance visibility into your invoices. On this page, you can search for invoices by an invoice status and/or an invoice level (if applicable).

The list below provides a brief description of each invoice status:

- *Current* invoices belong to the current coverage period
- *Prior* invoices belong to a previous coverage period
- *Paid* status is applied to all invoices to which payments have been applied
- *Obsolete* status applies to all invoices that have been replaced with a re-billed invoice

Searching by Invoice Level

Invoice level may be used by groups who receive separate invoices for different groupings of members, such as per location or line of business. If a group is using invoice levels, an *Invoice Level Search* option will display at the top of the *View Invoices* page. Follow the steps below to conduct an invoice level search.

1. Click the *Billing* tab on the navigation bar.

The *View Invoices* page displays. The default display mode in the *Invoice Level Search* section is *Current* invoices.

Invoice Level Search

Subgroup #

Your Current Invoices View

1 Items | 1-1

	Invoice Level	Subgroup #	Billing Period	Invoice #	Invoice Date	Payment Due Date	Total Amount Due
Options	+ 789012345		02/01/2017-02/28/2017		01/15/2017	02/01/2017	\$15,646.37

1 Items | 1-1

- If there are multiple groups under one account, you can locate a specific group by entering the identifier in the *invoice level* field, shown here as *Subgroup #*.

Invoice Level Search

Subgroup #

- Click *Submit*. The search results display the available invoices for the entered invoice level for the currently selected status type.

Invoice Level Search

Subgroup #

Your Current Invoices View

1 Items | 1-1

	Invoice Level	Subgroup #	Billing Period	Invoice #	Invoice Date	Payment Due Date	Total Amount Due
Options	789012345 / 0001	0001	02/01/2017-02/28/2017	6578	01/15/2017	02/01/2017	\$13,197.02

1 Items | 1-1

Viewing Consolidated and Sub-group Invoices

Consolidated invoices contain multiple sub-group invoices rolled into an overall group invoice. Invoices are consolidated for convenience to display a summary of all the invoices for a particular billing period. Consolidated invoice records are identified by a plus symbol (+) adjacent to the invoice level name or number, as shown in the figure below.

Your Current Invoices View

1 Items | 1-1

	Invoice Level	Subgroup #	Billing Period	Invoice #	Invoice Date	Payment Due Date	Total Amount Due
Options	+ 789012345		02/01/2017-02/28/2017		01/15/2017	02/01/2017	\$15,646.37

1 Items | 1-1

Click the (+) symbol to view the consolidated/sub-group invoice information. In the figure below, the sub-group 0001 is displayed in the *Invoice Level* identifier 789012345 / 0001 and the *Subgroup #* column.

Your Current Invoices View Current Submit

2 Items | 1 - 2

	Invoice Level	Subgroup #	Billing Period	Invoice #	Invoice Date	Payment Due Date	Total Amount Due
Options	- 789012345		02/01/2017-02/28/2017		01/15/2017	02/01/2017	\$15,646.37
Options	789012345 / 0001	0001	02/01/2017-02/28/2017	6578	01/15/2017	02/01/2017	\$13,197.02
Options	789012345 / 0002	0002	02/01/2017-02/28/2017	5435	01/15/2017	02/01/2017	\$2,449.35

2 Items | 1 - 2

Modifying the Invoice List View

The default view on the *View Invoices* page displays *Your Current Invoices*. You can easily modify the invoice list view on the *View Invoices* page by selecting to view a different period or category from the *View* drop-down box.

View Invoices

View Invoices
Search Invoices
Adjustments
Payment History

Invoice Level Search

Subgroup #

Submit Reset

Your Current Invoices View Current Submit

1 Items | 1 - 1

	Invoice Level	Subgroup #	Billing Period	Invoice #	Invoice Date	Payment Due Date	Total Amount Due
Options	+ 789012345		02/01/2017-02/28/2017		01/15/2017	02/01/2017	\$15,646.37

1 Items | 1 - 1

You can display *Current*, *Prior*, *Obsolete* or *Paid* invoices.

View Current Prior Obsolete Paid

Click *Submit*. The modified view displays.

Your Prior Invoices View Prior Submit

2 Items | 1 - 2

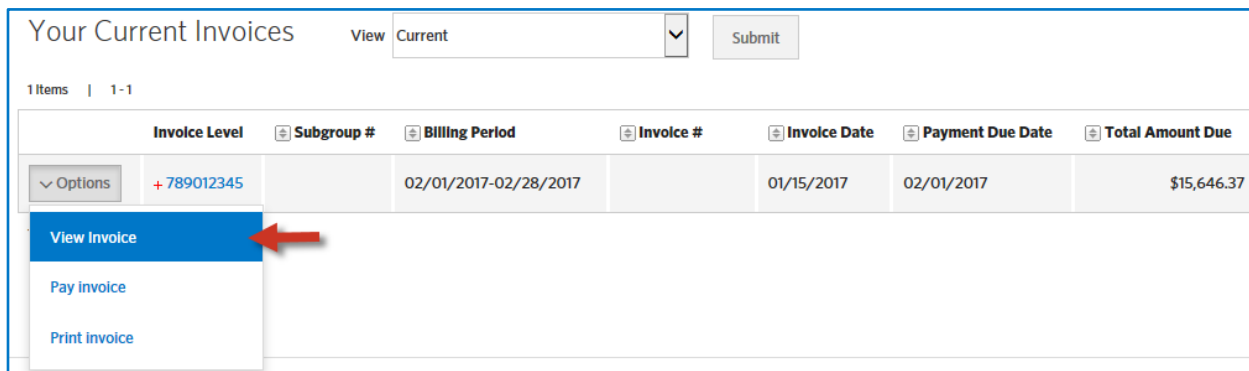
	Invoice Level	Subgroup #	Billing Period	Invoice #	Invoice Date	Payment Due Date	Total Amount Due
Options	+ 789012345		12/01/2016-12/31/2016		11/15/2016	12/01/2016	\$15,646.37
Options	+ 789012345		01/01/2017-01/31/2017		12/15/2016	01/01/2017	\$15,646.37

2 Items | 1 - 2

Viewing Invoice Details

View the details of an invoice to access invoice summary information, including financial totals, charges, retroactivity, adjustments and additional fees or charges. You can view the details of a regular individual invoice or consolidated/sub-group invoices. When viewing a consolidated invoice, *Consolidated Invoice View* displays in the header as a reminder.

To view the invoice details, click *Options* and select *View Invoice* for the invoice.

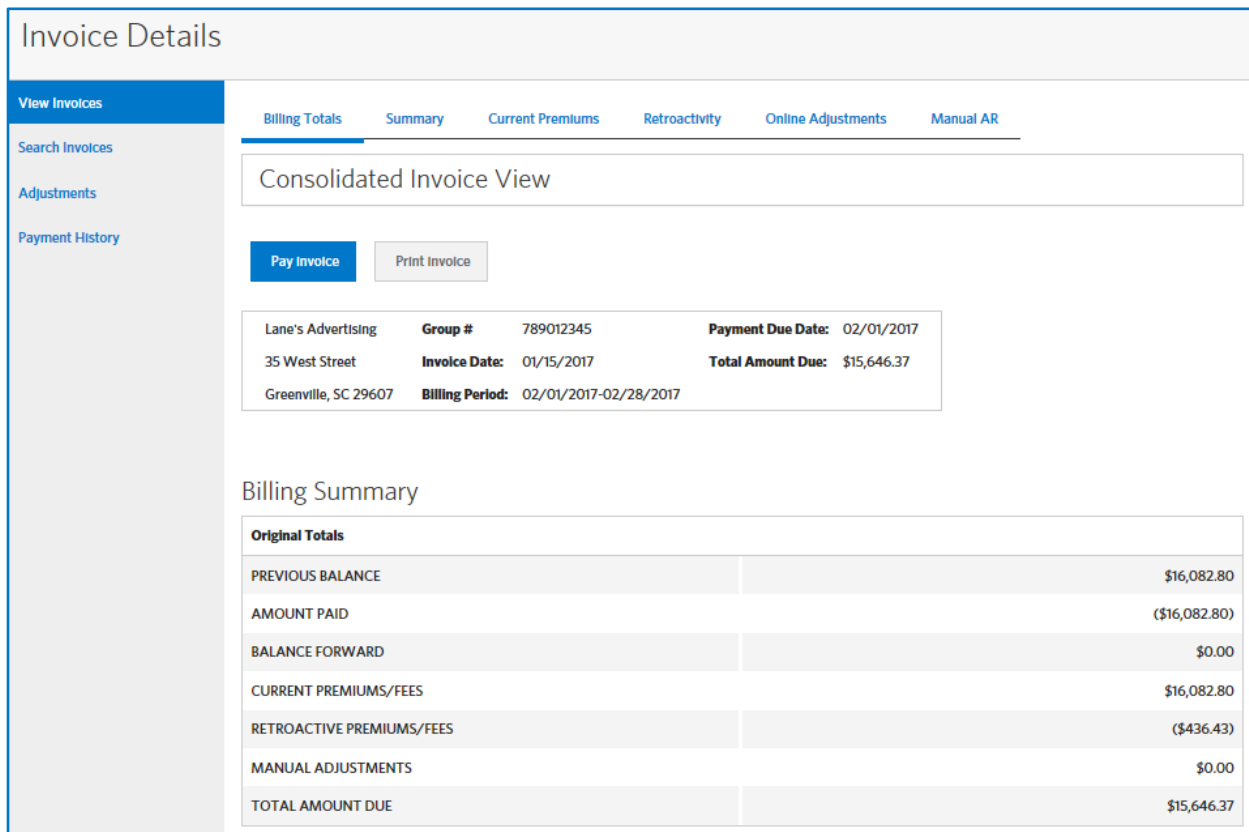


Your Current Invoices View Current Submit

1 Items | 1 - 1

	Invoice Level	Subgroup #	Billing Period	Invoice #	Invoice Date	Payment Due Date	Total Amount Due
Options	+ 789012345		02/01/2017-02/28/2017		01/15/2017	02/01/2017	\$15,646.37
View Invoice Pay invoice Print Invoice							

The *Invoice Details* page displays.



Invoice Details

View Invoices

Search Invoices

Adjustments

Payment History

Billing Totals Summary Current Premiums Retroactivity Online Adjustments Manual AR

Consolidated Invoice View

Pay Invoice Print Invoice

Lane's Advertising	Group #	789012345	Payment Due Date:	02/01/2017
35 West Street	Invoice Date:	01/15/2017	Total Amount Due:	\$15,646.37
Greenville, SC 29607	Billing Period:	02/01/2017-02/28/2017		

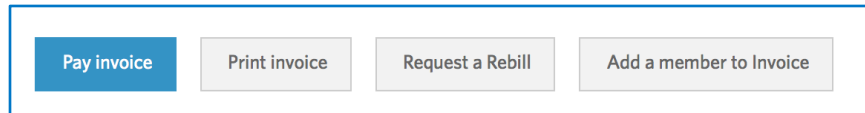
Billing Summary

Original Totals	
PREVIOUS BALANCE	\$16,082.80
AMOUNT PAID	(\$16,082.80)
BALANCE FORWARD	\$0.00
CURRENT PREMIUMS/FEEES	\$16,082.80
RETROACTIVE PREMIUMS/FEEES	(\$436.43)
MANUAL ADJUSTMENTS	\$0.00
TOTAL AMOUNT DUE	\$15,646.37



Invoice details and labels may vary depending on the settings established for your company. The following screens and descriptions are shown for sample purposes.

The buttons on the header of the *Invoice Details* pages enable you to quickly jump to pages to pay invoices, make invoice adjustments, print invoices and add members to invoices. Available options will depend on your group's configuration and your permissions.



The *Billing Totals* tab provides a summary of total costs and adjustments since the last invoice, such as retroactive adjustments, any unpaid balance, premiums for the current coverage period and the total amount due.

Click the *Summary* tab to view a breakdown of the types of plans available for each product and the members per plan for the current period, retroactive values, and combined.

Billing Totals
Summary
Current Premiums
Retroactivity
Online Adjustments
Manual AR

Consolidated Invoice View

Pay Invoice
Print Invoice

Lane's Advertising
35 West Street
Greenville, SC 29607

Group # 789012345
Invoice Date: 01/15/2017
Billing Period: 02/01/2017-02/28/2017

Payment Due Date: 02/01/2017
Total Amount Due: \$15,646.37

CURRENT for this period			
Type	Description	Contract Type	Count
CURRENT	Dental	Employee Only	20
	Dental	Employee + Family	20
	Dental	Employee + Spouse	20
	PPO	Employee + Spouse	20
	PPO	Employee + Family	20
	PPO	Employee Only	20
Total CURRENT Subscriber Count:			120
RETRO for this period			
Type	Description	Contract Type	Count
RETRO	Dental	Employee + Family	0
	Dental	Employee + Spouse	1
	Dental	Employee Only	1
	PPO	Employee + Spouse	1
	PPO	Employee Only	1
	PPO	Employee + Family	0
Total RETRO Subscriber Count:			4
NET for this period			
Type	Description	Contract Type	Count
NET	Dental	Employee Only	20
	Dental	Employee + Spouse	21
	Dental	Employee + Family	21
	PPO	Employee + Family	21
	PPO	Employee + Spouse	21
	PPO	Employee Only	20
Total NET Subscriber Count:			124

Click the *Current Premiums* tab to view the roster of billed subscribers and additional subscriber information. This may include columns for information, such as subscriber SSN, name, product, coverage level and premiums. The table is searchable and sortable. If the subscribers have dependents or multiple plans, the expand/collapse all buttons can be used to show/hide subscriber details.

Billing Totals
Summary
Current Premiums
Retroactivity
Online Adjustments
Manual AR

Consolidated Invoice View

Pay Invoice
Print Invoice

Lane's Advertising
Group #
789012345
Payment Due Date:
02/01/2017
35 West Street
Invoice Date:
01/15/2017
Total Amount Due:
\$0.00
Greenville, SC 29607
Billing Period:
02/01/2017-02/28/2017

Details

Find By
Please Select
Search
Reset

60 Items
1 - 20
Advanced Sorting
Expand All
Collapse All

SUBSCRIBER SSN	SUBSCRIBER ID	MEMBER ID	MEMBER SSN	LAST NAME	FIRST NAME	MI	RELATIONSHIP	AGE	Subgroup #	Description	Contract Type	PREMIUM AMOUNT
****0023	000-00-0023			Abraham	Boris	W			0001	Dental	Employee + Spouse	\$308.94
****0010	000-00-0010			Arnold	Lillian	J			0001	Dental	Employee + Family	\$367.71
****0021	000-00-0021			Bell	Victoria	U			0001	Dental	Employee Only	\$127.49

Click the *Retroactivity* tab to view the details of any retroactive adjustments that have been applied to the current invoice.

Billing Totals
Summary
Current Premiums
Retroactivity
Online Adjustments
Manual AR

Consolidated Invoice View

Pay Invoice
Print Invoice

Lane's Advertising
Group #
789012345
Payment Due Date:
02/01/2017
35 West Street
Invoice Date:
01/15/2017
Total Amount Due:
\$0.00
Greenville, SC 29607
Billing Period:
02/01/2017-02/28/2017

Retroactive Adjustments

Find By
Please Select
Search
Reset

2 Items
1 - 2
Advanced Sorting
Expand All
Collapse All

SUBSCRIBER SSN	SUBSCRIBER ID	MEMBER ID	MEMBER SSN	LAST NAME	FIRST NAME	MI	RELATIONSHIP	AGE	Subgroup #	Description	Contract Type	REASON	ADJUSTED PREMIUM AMOUNT
****0059	000-00-0059			Greene	Joan	G				PPO	Employee Only		(\$127.49)
****0060	000-00-0060			Lee	Piers	H				PPO	Employee + Spouse		(\$308.94)

The table may include columns for detail information, such as subscriber SSN, name, product, coverage level and adjusted premiums. The table is searchable and sortable. If the subscribers have dependents or multiple plans, the expand/collapse all buttons can be used to show/hide subscriber details.

Click the *Adjustments* tab to view current adjustments. This may include both new and previous subscriber premium amounts, as well as the reasons for differences. This information only displays if a user has selected to make adjustments or add a member to the invoice.

Current Adjustments

Find By

Please Select

Search

Reset

2 Items

1 - 2

Advanced Sorting

Expand All

Collapse All

		ADJUSTMENT TYPE	CHANGE REASON	SSN	SUBSCRIBER ID	MEMBER ID	LAST NAME	FIRST NAME	MI	Contract Type	Description	EFFECTIVE DATE	PREMIUM AMOUNT	NEW PREMIUM AMOUNT	ADJUSTED PREMIUM AMOUNT
Options	+			*****0006	000-00-0006		Davidson	Mark	C					Subscriber Total	\$1,060.00
Options	+			*****0002	000-00-0002		Jones	Joan	B					Subscriber Total	\$0.00

2 Items

1 - 2

To view the detailed information about an adjustment, click *Options* and select *View Adjustment Details*. Expand the subscriber details to display individual adjustments, if necessary.

Current Adjustments

Find By

Please Select

Search

Reset

2 Items

1 - 2

Advanced Sorting

Expand All

Collapse All

ADJUSTMENT TYPE	CHANGE REASON	SSN	SUBSCRIBER ID	MEMBER ID	LAST NAME	FIRST NAME	MI	Contract Type	Description	EFFECTIVE DATE	PREMIUM AMOUNT	NEW PREMIUM AMOUNT	ADJUSTED PREMIUM AMOUNT
Options		*****0006	000-00-0006		Davidson	Mark	C				Subscriber Total		\$1,060.00
		*****0006	000-00-0006		Davidson	Mark	C		Dental	Product Total			\$530.00
Options	Add Spouse/Domestic Partner	*****0006	000-00-0006		Davidson	Mark	C	Employee Only	Dental	10/01/2016	\$30.00	\$300.00	\$530.00
View Adjustment Details Delete Adjustment	Add Spouse/Domestic Partner	*****0006	000-00-0006	000-000-0006	Davidson	Mark	C	Employee Only	PPO	\$300.00			\$530.00

The *Adjustment Details* page is displayed enabling you to review the adjustment transaction details.

Adjustment Details

Bob's Garage	Group #	123456789	Payment Due Date:	02/01/2017
123 Main Street	Invoice Date:	01/15/2017	Total Amount Due:	\$3,790.00
Suite A	Billing Period:	02/01/2017-02/28/2017		
Corporate Headquarters				
Greenville, SC 29607				

SSN	FIRST NAME	Middle Initial	LAST NAME	Plan Name	Benefit Type	Amount
*****0006	Mark	C	Davidson	Dental	Employee Only	\$30.00
*****0006	Mark	C	Davidson	PPO	Employee Only	\$200.00

To complete the benefit enrollment for the subscriber below, please click the "View Enrollment" link in the Options drop down next to the Subscriber's name on the CURRENT PREMIUMS Tab.

Status Open Adjustment

Change Type Adds

Change Reason Add Spouse/Domestic Partner

SSN *****0006

Subscriber ID 000-00-0006

Member ID

Last Name Davidson

First Name Mark

MI C

Relationship

Age

Contract Type Employee Only

Description Dental

New Contract Type Dental

New Description Dental

Effective Date of Change 10/01/2016

Premium Amount \$30.00

Premium Amount \$200.00

New Premium Amount \$300.00

New Premium Amount \$300.00

Adjusted Premium Amount \$530.00

Notes Married

Dependents Affected

Dependent SSN	Dependent Last Name	Dependent First Name	Dependent MI	Dependent Relationship	Dependent Date Of Birth

Back

Click *Back* to return to the *Adjustments* tab.

If you need to delete an invoice adjustment, click *Options* and select *Delete Adjustment*.

Current Adjustments

Find By

2 Items | 1-2 |

ADJUSTMENT TYPE	CHANGE REASON	SSN	SUBSCRIBER ID	MEMBER ID	LAST NAME	FIRST NAME	MI	Contract Type	Description	EFFECTIVE DATE	PREMIUM AMOUNT	NEW PREMIUM AMOUNT	ADJUSTED PREMIUM AMOUNT
Options		*****0006	000-00-0006		Davidson	Mark	C					Subscriber Total	\$1,060.00
		*****0006	000-00-0006		Davidson	Mark	C		Dental	Product Total			\$530.00
Options	Adds	Add Spouse/Domestic Partner	*****0006	000-00-0006	Davidson	Mark	C	Employee Only	Dental	10/01/2016	\$30.00	\$300.00	\$530.00
View Adjustment Details		Add Spouse/Domestic Partner	*****0006	000-00-0006	Davidson	Mark	C	Employee Only	PPO	\$300.00			\$530.00
Delete Adjustment													

A confirmation message displays asking you to confirm the deletion.

Do you really want to delete this adjustment?

Click **OK** to delete the invoice adjustment. The *Adjustments* tab displays.

Click the *Manual AR* tab to view the details of other adjustment activities to an invoice, such as manual accounts receivable adjustments, late fees, credits, etc.

Billing Totals Summary Current Premiums Retroactivity Online Adjustments **Manual AR**

Consolidated Invoice View

Lane's Advertising	Group #	789012345	Payment Due Date:	02/01/2017
35 West Street	Invoice Date:	01/15/2017	Total Amount Due:	\$15,646.37
Greenville, SC 29607	Billing Period:	02/01/2017-02/28/2017		

MANUAL AR ADJUSTMENTS

2 Items |

Description	ADJUST AMOUNT
Setup	\$250.00
Late Fee	\$25.00

2 Items

Sorting Invoices

You can sort the invoice list and some invoice details using the sort function on any column to display the records in ascending or descending order.

2 Items | 1 - 2

	Invoice Level	Subgroup #	Billing Period	Invoice #	Invoice Date	Payment Due Date	Total Amount Due
Options	+ 789012345		12/01/2016-12/31/2016		11/15/2016	12/01/2016	\$15,646.37
Options	+ 789012345		01/01/2017-01/31/2017		12/15/2016	01/01/2017	\$15,646.37

2 Items | 1 - 2

When selected the sort column is highlighted to easily identify the data on which you are sorting. Clicking on the top arrow sorts the invoice records in ascending order by the column content.

2 Items | 1 - 2

	Invoice Level	Subgroup #	Billing Period	Invoice #	Invoice Date	Payment Due Date	Total Amount Due
Options	+ 789012345		12/01/2016-12/31/2016		11/15/2016	12/01/2016	\$15,646.37
Options	+ 789012345		01/01/2017-01/31/2017		12/15/2016	01/01/2017	\$15,646.37

2 Items | 1 - 2

Clicking on the bottom arrow sorts the invoice records in descending order by the column content.

2 Items | 1 - 2

	Invoice Level	Subgroup #	Billing Period	Invoice #	Invoice Date	Payment Due Date	Total Amount Due
Options	+ 789012345		01/01/2017-01/31/2017		12/15/2016	01/01/2017	\$15,646.37
Options	+ 789012345		12/01/2016-12/31/2016		11/15/2016	12/01/2016	\$15,646.37

2 Items | 1 - 2

Click the column header name to remove the sort and display the default view.

2 Items | 1 - 2

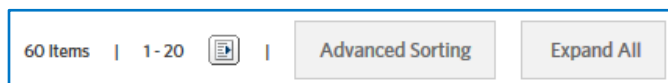
	Invoice Level	Subgroup #	Billing Period	Invoice #	Invoice Date	Payment Due Date	Total Amount Due
Options	+ 789012345		12/01/2016-12/31/2016		11/15/2016	12/01/2016	\$15,646.37
Options	+ 789012345		01/01/2017-01/31/2017		12/15/2016	01/01/2017	\$15,646.37

2 Items | 1 - 2

Advanced Sorting

Some pages that display lists with information in multiple columns include an advanced sorting feature that enables you to sort data using multiple columns and save your results.

1. Click the *Advanced Sorting* button.



The *Advanced Sorting* window displays.

Advanced Sorting ✕

Create a new sort order

Sort by -- Select -- Ascending ☐ Subtotal by sorted column

Then by -- Select -- Ascending ☐ Subtotal by sorted column

Then by -- Select -- Ascending ☐ Subtotal by sorted column

Then by -- Select -- Ascending ☐ Subtotal by sorted column

☐ Include grand total

Items per page 20

View Save as sort template Reset Cancel

2. Select the criteria for the new sort order.
3. Click *View*.

Advanced Sorting ✕

Create a new sort order

Sort by PREMIUM AMOUNT Ascending ☒ Subtotal by sorted column

Then by SUBSCRIBER SSN Ascending ☐ Subtotal by sorted column

Then by -- Select -- Ascending ☐ Subtotal by sorted column

Then by -- Select -- Ascending ☐ Subtotal by sorted column

☐ Include grand total

Items per page 20

View Save as sort template Reset Cancel

After sorting the columns, an arrow displays in the column header to indicate whether the data is sorted in ascending or descending order. The column name also includes a number to indicate the sorting order.

60 Items | 1 - 20 | Advanced Sorting Reset Sort Expand All Collapse All

2SUBSCRIBER SSN	SUBSCRIBER ID	MEMBER ID	MEMBER SSN	LAST NAME	FIRST NAME	MI	RELATIONSHIP	AGE	Subgroup #	Description	Contract Type	1PREMIUM AMOUNT
*****0003	000-00-0003			Quinn	Vanessa	C			0001	Dental	Employee Only	\$127.49
*****0006	000-00-0006			Quinn	Richard	F			0001	Dental	Employee Only	\$127.49
*****0009	000-00-0009			Rutherford	Katherine	I			0001	Dental	Employee Only	\$127.49

If you selected to subtotal the columns or include the grand total, the subtotal information will display within the results set. The grand total will display at the end of the results set.

*****0057	000-00-0057			Mackenzie	Amelia	E			0001	Dental	Employee Only	\$127.49
*****0060	000-00-0060			Lee	Piers	H			0001	Dental	Employee Only	\$127.49
											Subtotal for PREMIUM AMOUNT \$127.49 \$2,549.80	

Depending on your search results, the data may display on multiple pages. You can use the navigation control at the bottom of the page to navigate to additional pages to see the total amounts.





When selecting your sort criteria, you can also click *Save as sort template* to create a template of a frequent sorting order to reuse in the future.

A horizontal bar containing four buttons: 'View' (blue), 'Save as sort template' (grey), 'Reset' (grey), and 'Cancel' (grey). A red arrow points to the 'Save as sort template' button.

Enter a name for the template and click *Save*.

The 'Advanced Sorting' dialog box has a title bar with a close button. The main content area is titled 'Save as a sort template' and includes the instruction 'Save your selected sort order with a given name to use in the future'. Below this is a label '* = Required Fields' and a text input field labeled 'Name*'. At the bottom are 'Save' and 'Cancel' buttons.

Your sort templates will then display in the *Advanced Sorting* window. To apply the sort criteria, click *View* for the applicable template.

The 'Advanced Sorting' dialog box shows a section titled 'Your sort templates' enclosed in a red box. It contains a table with one row: 'Premium, SSN Sorting', 'View', 'Edit', and 'Delete'. Below this is a 'Create a new sort order' section with multiple dropdown menus for 'Sort by', 'Then by', and 'Then by', each with an 'Ascending' dropdown and a 'Subtotal by sorted column' checkbox. At the bottom are 'View', 'Save as sort template', 'Reset', and 'Cancel' buttons.

You can also click to *Edit* or *Delete* a sort template as necessary.

After applying an advanced sort to a page, you can click the *Reset Sort* button on the page header to clear the selected criteria.

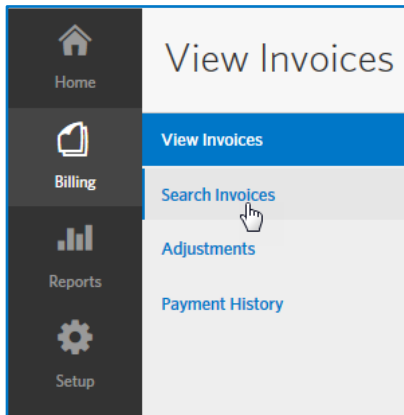
A horizontal bar containing the text '60 Items | 1 - 20' followed by a list icon, and three buttons: 'Advanced Sorting', 'Reset Sort', and 'Expand All'.

Searching for Invoices

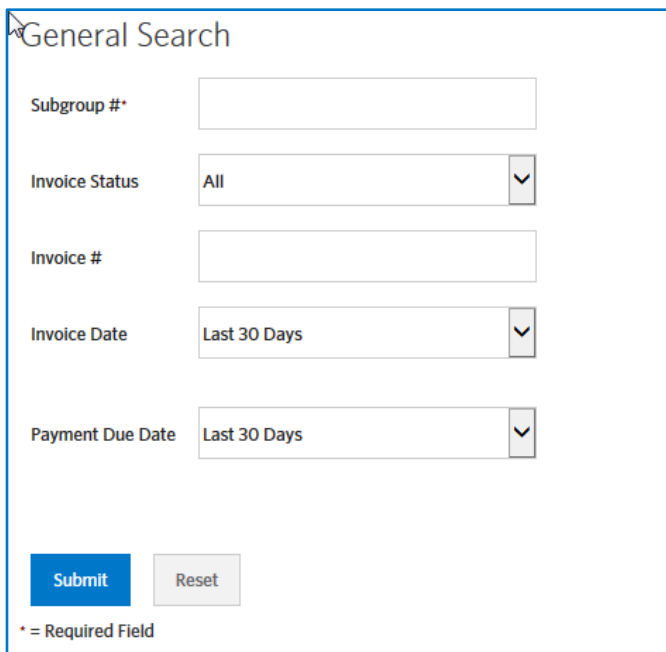
You can locate a specific invoice by conducting a search using the *Search Invoices* page.

Follow the steps below to search for invoices.

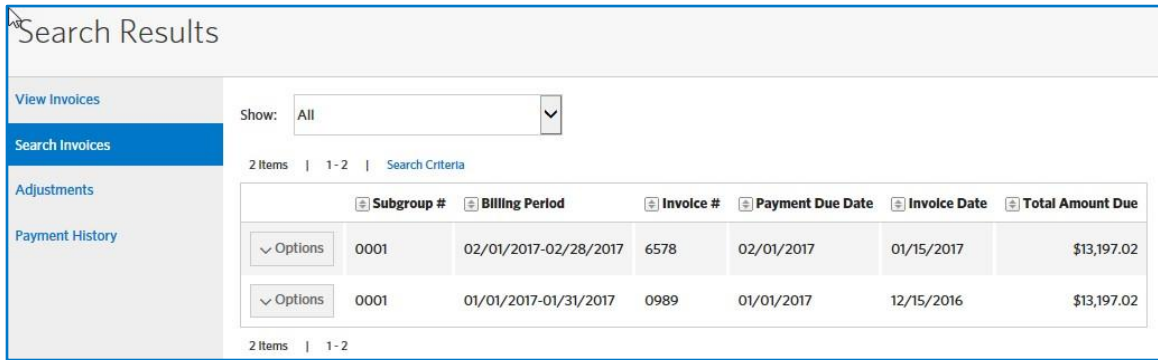
1. Click the *Billing* tab on the navigation bar. The *View Invoices* page displays.
2. Click the *Search Invoices* tab.



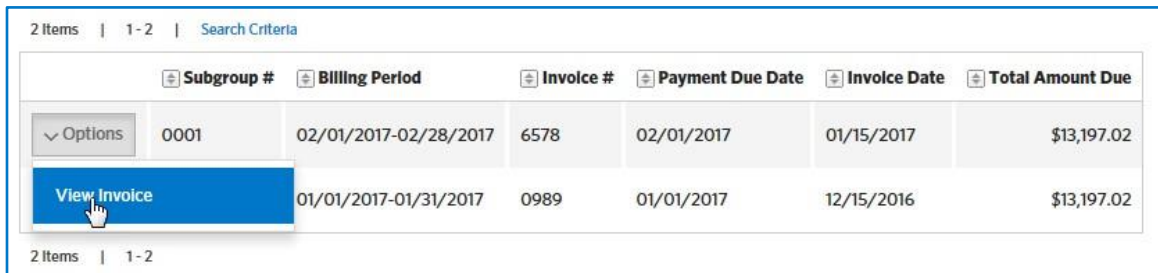
The *General Search* page displays.

A screenshot of the 'General Search' form. It features five input fields: 'Subgroup #' (marked with an asterisk), 'Invoice Status' (a dropdown menu set to 'All'), 'Invoice #' (marked with an asterisk), 'Invoice Date' (a dropdown menu set to 'Last 30 Days'), and 'Payment Due Date' (a dropdown menu set to 'Last 30 Days'). At the bottom are 'Submit' and 'Reset' buttons. A legend at the bottom left states '* = Required Field'.

3. Enter the search criteria.
4. Click *Submit* to display the search results.



- To view the invoice details, click *Options* and select *View Invoice*.

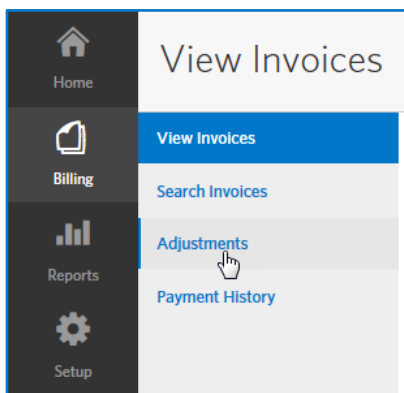


The *Invoice Details* page displays for the selected invoice. See [Viewing Invoice Details](#) for additional information.

Viewing Invoice Adjustments

Follow the steps below to view invoice adjustments.

- Click the *Billing* tab on the navigation bar. The *View Invoices* page displays.
- Click the *Adjustments* tab.



The *General Search* page for *Adjustments* displays.

General Search

Subgroup #

Invoice #

Invoice Date ▼

Payment Due Date ▼

Adjustment Date ▼

Adjustment Status ▼

- Enter the search criteria for the adjustment.
- Click *Submit* to display the search results.

Search Results				
View Invoices Search Invoices Adjustments Payment History	5 Items 1 - 5 Search Criteria			
		Group #	Open	Closed
	Options	123456789		
	Options	123456789		
	Options	123456789		
	Options	123456789		
5 Items 1 - 5				

- To view the adjustment details, click *Options* and select *View Adjustments*.

5 Items 1 - 5 Search Criteria				
		Group #	Open	Closed
Options		123456789		
View Adjustment		123456789		
Options		123456789		

The *Adjustment Details* page displays for the selected invoice. See [Viewing Invoice Details](#) for additional information.

Adjustment Details

SSN	FIRST NAME	Middle Initial	LAST NAME	Plan Name	Benefit Type	Amount
*****0002	Joan	B	Jones	Dental	Employee + Spouse	\$40.00
*****0002	Ken	B	Jones	PPO	Employee + Spouse	\$275.00
*****0002	Joan	B	Jones	PPO	Employee + Spouse	\$275.00

To complete the benefit enrollment for the subscriber below, please click the "View Enrollment" link in the Options drop down next to the Subscriber's name on the CURRENT PREMIUMS Tab.

Status

Open Adjustment

Change Type

Cancellations

Change Reason

Cancel Subscriber

SSN

*****0002

Subscriber ID

000-00-0002

Member ID

Last Name

Jones

First Name

Joan

MI

B

Age

Effective Date of Change

09/30/2016

Premium Amount

\$40.00

Premium Amount

\$275.00

Premium Amount

\$275.00

Adjusted Premium Amount

\$0.00

Notes

Back

Viewing Payment History

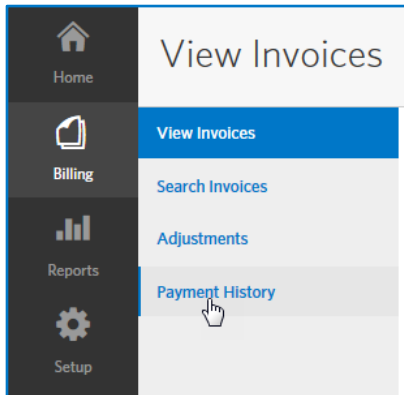
Search for and view payment history to review specific information about payments made to invoices.



A received payment is only tied to an invoice in eBilling if the payment was submitted electronically.

Follow the steps below to view payment history.

1. Click the *Billing* tab on the navigation bar. The *View Invoices* page displays.
2. Click the *Payment History* tab.



The *General Search* page for payments displays.

General Search

Subgroup #

Invoice #

Payment Status ▼

Online Payment Date ▼

Posted Date ▼

ACH Tracking Number

3. Enter the search criteria.
4. Click *Submit* to display the search results.

Search Results												
View Invoices Search Invoices Adjustments Payment History												
14 Items 1 - 14 Advanced Sorting Search Criteria												
	Subgroup #	Billing Period	Invoice #	Payment Due Date	Invoice Date	Total Amount Due	Payment Status	Online Payment Date	Posted Date	ACH Tracking Number	Payment Amount	Reason Code
▼ Options	0002	02/01/2017-02/28/2017	5435	02/01/2017	01/15/2017		Scheduled Payment	05/31/2017 15:57:26		29949313	\$2,449.35	
▼ Options	0002	02/01/2017-02/28/2017	5435	02/01/2017	01/15/2017		Scheduled Payment	08/22/2017 15:42:15		30699418	\$2,449.35	
▼ Options	0002	02/01/2017-02/28/2017	5435	02/01/2017	01/15/2017		Scheduled Payment	04/26/2017 11:47:19		29575549	\$2,449.35	



If necessary, you can use the *Advanced Sorting* feature to sort to the data using multiple columns. See [Advanced Sorting](#) for additional information.

Managing and Printing Invoice Transactions

From any tab of the *Invoice Details* page, you can manage invoice transactions including:

- Paying invoices
- Making invoice adjustments
- Printing invoices
- Adding members to invoices



Available options may vary depending upon your carrier's configurations.

Making Online Invoice Payments

Follow the steps below to make an online invoice payment.

1. Initiate the invoice payment.

eBilling provides three ways to initiate an invoice payment:

- Click the *Make a Payment* button on the current invoice displayed on the *Home* page.

The screenshot shows the 'Home' page of a web application. At the top, it says 'Home'. Below that, it displays 'Your last login was 09/27/2017 at 01:40:12 PM EST'. The main section is titled 'Your Current 02/01/2017 Invoices'. It shows an invoice for 'Lane's Advertising' with the number '789012345'. The total amount due is '\$15,646.37'. Below this, it lists the 'Payment Due Date: 02/01/2017', 'Invoice Date: 01/15/2017', and 'Billing Period: 02/01/2017-02/28/2017'. At the bottom of this section, there are three buttons: 'Make a Payment' (highlighted with a red box), 'Print Invoices', and 'View Consolidated Details'. Below this, it says 'Individual Invoices (2)' and 'Show Individual Invoices' with a dropdown arrow.

- Click *Options* and select *Pay Invoice* on the invoice displayed on the *View Invoices* page (for both consolidated and non-consolidated invoices).

Your Current Invoices View Current Submit

1 Items | 1 - 1

Invoice Level	Subgroup #	Billing Period	Invoice #	Invoice Date	Payment Due Date	Total Amount Due
Options +789012345		02/01/2017-02/28/2017		01/15/2017	02/01/2017	\$15,646.37

View Invoice
Pay Invoice
Print Invoice

- Click the *Pay invoice* button on the *Invoice Details* page.

Invoice Details

View Invoices

Search Invoices

Adjustments

Payment History

Billing Totals Summary Current Premiums Retroactivity Online Adjustments Manual AR

Consolidated Invoice View

Pay Invoice Print Invoice

Lane's Advertising Group # 789012345 Payment Due Date: 02/01/2017
35 West Street Invoice Date: 01/15/2017 Total Amount Due: \$15,646.37
Greenville, SC 29607 Billing Period: 02/01/2017-02/28/2017

- (If applicable) Select *Make online payment*, then click *Next*.

Choose payment method

How would you like to make a payment?

☒ Make online payment
☐ Print payment stub to send in the mail

Next Back

- (If applicable) Select the payment account and click *Next*. If you need to edit the existing account or add a new one, see the [Editing Payment Accounts on Invoice Payment](#) section.

Choose payment account

You have these accounts on file. Do you want to use one of your preexisting accounts or would you like to add another account?

☒ I'd like to use : Test Bank Account [edit account info](#)
☐ Create New Account

Next Back



If a default payment account has been selected, this step will be skipped. You can still update your account or create a new one by selecting *change account* on subsequent screens. See the [Editing Payment Accounts on Invoice Payment](#) section for more information.

4. Select the payment amount in the *Choose amount* section.

Payment options may include:

- *Edit Payment* - This option allows you to enter a new payment amount. You be required to enter a reason for changing the payment amount.

Choose amount

Paying with: Test Bank Account [change account](#)

Please choose from the following payment options:

☒ Edit Payment

amount:

☐ Pay as Billed \$13,197.02

☐ Pay as Adjusted \$

Please provide an explanation for changing the payment amount.

Add Cancel

If you are paying a consolidated invoice, you will select the *select invoices* link.

Choose amount

Paying with: Test Bank Account [change account](#)

Please choose from the following payment options:

☒ Edit Payment [select invoices](#)

☐ Pay as Billed \$15,646.37 [select invoices](#)

☐ Pay as Adjusted \$

Edit Payment

Show entries Search:

☒	Pay Amount ↕	Group	Statement Number ↕	Invoice Due Date ↕	Coverage Period ↕	Amount ↕	Payment Pending ↕	Sent Payment ↕	Confirmed Payment ↕	CC Payment Confirmed ↕
☒	13197.02	Lane's Advertising	6578	02/01/2017	02/01/2017-02/28/2017	\$13,197.02	\$65,985.10	\$0.00	\$0.00	\$0.00
☒	2449.35	Lane's Advertising	5435	02/01/2017	02/01/2017-02/28/2017	\$2,449.35	\$12,246.75	\$0.00	\$0.00	\$0.00

Showing 1 to 2 of 2 entries

- Pay as Billed

Show

All

▼

entries

Search:

☒	Pay Amount	Group	Statement Number	Invoice Due Date	Coverage Period	Amount	Payment Pending	Sent Payment	Confirmed Payment	CC Payment Confirmed
☒	\$13,197.02	Lane's Advertising	6578	02/01/2017	02/01/2017-02/28/2017	\$13,197.02	\$65,985.10	\$0.00	\$0.00	\$0.00
☒	\$2,449.35	Lane's Advertising	5435	02/01/2017	02/01/2017-02/28/2017	\$2,449.35	\$12,246.75	\$0.00	\$0.00	\$0.00

Showing 1 to 2 of 2 entries

First

Previous

1

Next

Last

Done

-
- Choose amount
- Paying with: Test
- Please choose from:
- ☐ Edit Payment \$1
- ☒ Pay as Billed \$1
- ☐ Pay as Adjusted
- You selected 2
- Date of Payment: 09/27/2017

- 39

✓ 1 ✓ 2 ✓ 3 4 Confirm Information 5

Invoice Information

Group Billing

Lane's Advertising
789012345

Payment Due Date: 02/01/2017
Billing Period: 02/01/2017-02/28/2017
Total Amount Due: \$15,646.37

Note: Click the Submit button only once to submit this transaction and refrain from refreshing your browser while the transaction is processing. Doing so might result in this transaction processing more than once.

Confirm Information

Payment Account: Test Bank Account [change account](#)
Amount of Payment: \$15,646.35 [edit payment amount](#)
Payment Date: 09/27/2017 [change payment date](#)
[Review invoice payment information details](#)

Payment Authorization

☐ I hereby authorize National Insurance to charge to my account. Should any draft entry be dishonored for any reason, or drawn after the depositor's authorization has been withdrawn, National Insurance agrees that the financial institution shall be relieved of any liability. **Authorization Date:**

Please [print](#) this screen for your records

All payments made after 5:00 PM EST will be sent to the bank on the following business day.

[Submit Payment](#) [Back](#)

- Click the *change account* link to modify the payment account. See [Editing Payment Accounts](#) for additional details.
- Click the *edit payment amount* or *change payment date* links to return to the *Choose amount & date* page from which you can modify the payment amount or date.
- Click the *Review invoice payment information details* link to display a summary of the current payment information.

Pending Confirmation					
Pay Amount	Group	Statement Number	Invoice Due Date	Coverage Period	Amount
\$13,197.00	Lane's Advertising	6578	02/01/2017	02/01/2017-02/28/2017	\$13,197.02
\$2,449.35	Lane's Advertising	5435	02/01/2017	02/01/2017-02/28/2017	\$2,449.35

[Done](#)

- (If applicable) Select the checkbox if you agree to the *Payment Authorization* statement.
- Click *Submit Payment*. The *Payment Results* page displays.

✓ 1

✓ 2

✓ 3

✓ 4

5 Payment details

Invoice Information

TWIN OAKS INDUSTRIES INC

BCBSKS Group

MPN26348 / BCBSKS / 00002 (TWIN OAKS INDUSTRIES INC)

Invoice Due Date: 02/01/2023

Coverage Period: 02/01/2023-02/28/2023

Payment details

Thank You!

Payment Complete.

Your payment has been successfully submitted. Please allow for 2-3 business days for your payment to be processed.

Your tracking number is **43530489**

Account Name: Test Account

Payment Date*: 12/20/2023

Total Amount Paid: \$15,561.92

Please [print this screen](#) for your records

[Review invoice payment information details](#)

Return to Home

*The Submit Payment Date is the date the carrier is scheduled to receive your payment. To ensure your payment is confirmed by the due date, allow for 2-3 business days for processing.

The *Payment Results* section also provides several additional features.

- You can print this screen to generate a hard copy or save a PDF of the payment for your records.
- Click *Review invoice payment information details* to display a summary of the current invoice details.

Invoice Detail

Group	Statement Number	Invoice Due Date	Coverage Period	Amount	Pay Amount	Tracking #
Lane's Advertising	6578	02/01/2017	02/01/2017-02/28/2017	\$13,197.02	\$13,197.00	30072879
Lane's Advertising	5435	02/01/2017	02/01/2017-02/28/2017	\$2,449.35	\$2,449.35	30072878

Done

9. Click *Return to Home*.

Editing Payment Accounts on Invoice Payments

When editing payment accounts on invoices, you can update the existing account or create a new account.

Editing an Existing Account on an Invoice Payment

Follow these steps to edit an existing account on an invoice payment.

1. Initiate an invoice payment. See [Making Online Invoice Payments](#) for additional information.

2. (If applicable) Select *Make online payment*, then click *Next*.

Choose payment method

How would you like to make a payment?

☒ Make online payment

☐ Print payment stub to send in the mail

[Next](#) [Back](#)

3. Select the *I'd like to use* option, then select the *edit account info* link.

Choose payment account

You have these accounts on file. Do you want to use one of your preexisting accounts or would you like to add another account?

☒ I'd like to use : Test Bank Account [edit account info](#)

☐ Create New Account

[Next](#) [Back](#)

Note

If a default payment account has been set, this step will be skipped. You can select *change account* from the *Choose amount and date* page to access the *Choose payment account* page, if needed.

Choose amount

Paying with: Test Bank Account [change account](#) 

Please choose from the following payment options:

☒ Edit Payment [select invoices](#)

☐ Pay as Billed \$15,646.37 [select invoices](#)

☐ Pay as Adjusted \$

Date of Payment 

All payments made after 5:00 PM EST will be sent to the bank on the following business day.

[Next](#) [Back](#)

The *Edit Payment Account* page displays.

✓ 1

2 Choose payment account

3

4

5

Invoice Information

Group Billing

Lane's Advertising

789012345 / 0001

Invoice #:

6578

Payment Due Date:

02/01/2017

Billing Period:

02/01/2017-02/28/2017

Amount Due:

\$13,197.02

Basic Information

Invoice Restrictions

Test Bank Account

* = Required Fields

Bank Account Information

Account Name*

Test Bank Account

Bank Name*

Test Bank Account

City

State / Province

Country Code

Account Type

Checking

Account Holder*

Bank Account

Routing Number*

*****4269

Account Number *

*****7890

Routing Number

Account Number

Account Options

☐

Make this my default payment account

Save

Cancel

4. Edit the account information as necessary. You can modify the *Account Type*, *Account Options* and *Invoice Restrictions*, if applicable. If you have more than one billing group, you can select which group's invoices can be paid with the account under the *Invoice Restrictions* tab.

Basic Information

Invoice Restrictions

Test Bank Account

Select the invoice levels that can access the account

☒ Restrict access to this account by system and invoice level

Use drop down to select invoice levels per enabled system

System:

Group Billing

Submit

2 Items | 1 - 2

☒	Group #	Subgroup #	Auto-draft enabled?
☒	789012345	0001	
☒		0002	

2 Items | 1 - 2

Save

Cancel

- Click *Save*.

Creating a New Account on an Invoice Payment

Follow the steps below to create a new account on an invoice payment.

- Initiate an invoice payment. See [Making Online Invoice Payments](#) for additional information.
- (If applicable) Select *Make online payment*, then click *Next*.

Choose payment method

How would you like to make a payment?

☒ Make online payment

☐ Print payment stub to send in the mail

Next

Back

- Select the *Create New Account* option and then click *Next*.

Choose payment account

You have these accounts on file. Do you want to use one of your preexisting accounts or would you like to add another account?

☐ I'd like to use : Test Bank Account [edit account info](#)

☒ Create New Account

Next

Back



If a default payment account has been set, this step will be skipped. You can select *change account* from the *Choose amount and date* page to access the *Choose payment account* page, if needed.

Choose amount

Paying with: Test Bank Account [change account](#)

Please choose from the following payment options:

☒ Edit Payment [select invoices](#)

☐ Pay as Billed \$15,646.37 [select invoices](#)

☐ Pay as Adjusted \$

Date of Payment

All payments made after 5:00 PM EST will be sent to the bank on the following business day.

[Next](#) [Back](#)

- (If applicable) Select the type of payment account you will be creating, i.e. banking or credit card, then click *Submit*.

✓ 1 2 Choose payment account 3 4 5

Invoice Information

Group Billing

Lane's Advertising
789012345

Payment Due Date: 02/01/2017

Billing Period: 02/01/2017-02/28/2017

Total Amount Due: \$15,646.37

Basic Information Invoice Restrictions

* = Required Fields

Type of Account* [Submit](#)

[Next](#) [Cancel](#)

- Enter the required account information. Required fields are indicated by an asterisk (*). Navigate to additional tabs, if necessary.

The *I wish to keep my payment account information on file for future use* checkbox is selected by default. Deselect this option if you do not want to store the account information for future payments.

Basic Information

Billing Information

Invoice Restrictions

* = Required Fields

Type of Account* Credit Card Account

Credit Account Information

Account Name* Customized name for identifying the account

Credit Card Type* Visa   

Card Holder's Name* Name as it appears on the credit card

Account Number *

Confirm Account Number *

Account Options

☒ Make this my default payment account

☒ I wish to keep my payment account information on file for future use

- Click **Save**. The Invoice Information displays the new account.

Printing Payment Stubs for Mailing Payments

Follow the steps below to print payment stubs for mailing payments.

- Initiate the invoice payment. See *Making Online Invoice Payments* for additional information.
- (If applicable) Select *Print payment stub to send in the mail* on the *Choose payment method* page and click *Next*.

1 Choose payment method

2

3

4

5

Invoice Information

Group Billing

Lane's Advertising
789012345

Payment Due Date: 02/01/2017

Billing Period: 02/01/2017-02/28/2017

Total Amount Due: \$15,646.37

Choose payment method

How would you like to make a payment?

☐ Make online payment
☒ Print payment stub to send in the mail

The *Print the payment stub* page is displayed. If you are paying a consolidated bill, you may select the individual invoices to be included in the payment.

Print the payment stub

Print a payment stub for the invoice(s) selected below.

2 Items

☒	Payment Due Date	Invoice #	Total Amount Due	Invoice Date	Billing Period
☐	02/01/2017	5435	\$2,449.35	01/15/2017	02/01/2017-02/28/2017
☐	02/01/2017	6578	\$13,197.02	01/15/2017	02/01/2017-02/28/2017

2 Items

- Click *Next*. A PDF of the payment stub is generated.



Group #	Subgroup #	Invoice Date	Billing Period	Invoice #	Payment Due Date	Total Amount Due
789012345	0001	01/15/2017	02/01/2017-02/28/2017	6578	02/01/2017	\$13,197.02

Group Name: Lane's Advertising

Please remit payment to: NATIONAL INSURANCE

For Group Services:

In Charleston: 1-843-999-1551

Outside Charleston: 1-800-451-1527

IMPORTANT NOTICE

Effective January 1, 2010, National Insurance, will begin charging a \$25.00 service fee for any payment that is returned as not honored by your bank.

Please detach at perforation and return the bottom portion with your payment. Thank You.

Group #	Subgroup #	Invoice Date	Billing Period	Invoice #	Payment Due Date	Total Amount Due
789012345	0001	01/15/2017	02/01/2017-02/28/2017	6578	02/01/2017	\$13,197.02

Lane's Advertising

35 West Street

Greenville, SC 29607

Please remit payment to:

NATIONAL INSURANCE

100 BENEFITFOCUS WAY

CHARLESTON, SC 29464-0494

4. Print the payment stub and submit to the address on the invoice.

Printing Invoices

Print invoices to PDF by completing the steps below.

1. Select the invoice(s) to print.
2. Use one of the following three options to print the selected invoice(s):
 - Click the *Print Invoices* button on the current invoice displayed on the *Home* page.

Home

Your last login was 09/28/2017 at 01:33:43 PM EST

Your Current 02/01/2017 Invoices

Lane's Advertising

789012345

\$15,646.37

Total Amount Due

Payment Due Date: 02/01/2017

Invoice Date: 01/15/2017

Billing Period: 02/01/2017-02/28/2017

Make a Payment

Print Invoices

View Consolidated Details

Individual Invoices (2)

Show Individual Invoices ▾

- Click *Options* and select *Print Invoice* on the invoice displayed on the *View Invoices* page (for both consolidated and non-consolidated invoices).

View Invoices

View Invoices

Search Invoices

Adjustments

Payment History

Invoice Level Search

Subgroup #

Submit Reset

Your Current Invoices

View Current ▾ Submit

1 Items | 1 - 1

	Invoice Level	Subgroup #	Billing Period	Invoice #	Invoice Date	Payment Due Date	Total Amount Due
Options	+ 789012345		02/01/2017-02/28/2017		01/15/2017	02/01/2017	\$15,646.37
View Invoice Pay Invoice Print Invoice							

- Click the *Print invoice* button on the *Invoice Details* page.

[Billing Totals](#)
[Summary](#)
[Current Premiums](#)
[Retroactivity](#)
[Online Adjustments](#)
[Manual AR](#)

Consolidated Invoice View

Pay invoice

Print invoice

Lane's Advertising

Group #

789012345

Payment Due Date:

02/01/2017

35 West Street

Invoice Date:

01/15/2017

Total Amount Due:

\$15,646.37

Greenville, SC 29607

Billing Period:

02/01/2017-02/28/2017

Billing Summary

Original Totals	
PREVIOUS BALANCE	\$16,082.80
AMOUNT PAID	(\$16,082.80)
BALANCE FORWARD	\$0.00
CURRENT PREMIUMS/FEEs	\$16,082.80
RETROACTIVE PREMIUMS/FEEs	(\$436.43)
MANUAL ADJUSTMENTS	\$0.00
TOTAL AMOUNT DUE	\$15,646.37

- The complete invoice details will print to PDF and open in a new window.



Lane's Advertising
35 West Street
Greenville SC 29607

BILLING TOTALS

Original Totals

PREVIOUS BALANCE	\$2,518.40
AMOUNT PAID	(\$2,518.40)
BALANCE FORWARD	\$0.00
CURRENT PREMIUMS/FEEES	\$2,518.40
RETROACTIVE PREMIUMS/FEEES	(\$89.05)
MANUAL ADJUSTMENTS	\$0.00
TOTAL AMOUNT DUE	\$2,449.35

Page 1 of 12

Note

If enabled, you can select the format (PDF, CSV or HTML) and which invoice sections to print before printing.

Requesting a Rebill

Customer initiated re-billing enables a primary contact to view and generate an updated invoice (rebill) that captures Benefitfocus eEnrollment™ changes processed after the original prepared date of the invoice.

To be eligible for re-billing, customer invoices must meet the following criteria:

- Invoice(s) do not include HMO plans
- The customer must have an active eEnrollment account
- The primary contact must have access and permission to request re-bills
- The customer must have an active status

Note

Rebills for the current month can only occur up to five days prior to the next invoice month. The rebill will be completed within four business days of the request.

Follow the steps below to request a rebill.

1. View an invoice. See [Viewing Invoices](#) for additional information.
2. On the *Invoice Details* page, click *Request a Rebill*.

Invoice Details

View Invoices

Search Invoices

Adjustments

Payment History

SUMMARY OF ACCOUNT

BENEFIT SNAPSHOT

CURRENT INFORCE CHARGES

RETROACTIVITY

ADJUSTMENTS

OTHER CHARGES/FEEs

REBILL REQUEST SUMMARY

Pay Invoice

Print Invoice

Request a Rebill

Account Name

COOL QUEST

Account Number/Bill Package

89750895 / 1001

Payment Due Date

01/01/2017

Balance

\$3,264.87

Invoice #

H4105967

Prepared Date

12/16/2016

Coverage Period

01/01/2017-01/31/2017

Triad

E23G

Billing Questions Contact

800-555-1234

Bill Package Name

COOL QUEST LLC

Financial Totals

This invoice is intended for informational use only. To ensure timely and accurate payment to your account, please pay online.

Original Totals

Opening Balance

\$4,501.31

Paid Date 11/20/16 Payment ID: 00000027530674

\$4,501.31

The *Request a Rebill* window displays.

Request a Rebill

The following invoices are eligible for rebill:

☒

☒

H4482162

87510604 / 1002

03/01/2017-03/31/2017

The following invoices are not eligible for rebill:

Before you submit a rebill request, make sure you have completed all of your membership changes within eEnrollment.

Request Rebill

Cancel

- Select the invoice(s) to rebill and then click *Request Rebill*.

Note Before submitting a rebill request, verify that you have completed all of your membership changes within eEnrollment.

The rebill request is submitted and the *Rebill Request Summary* tab displays.

Invoice Details

View Invoices

Search Invoices

Adjustments

Payment History

SUMMARY OF ACCOUNT

BENEFIT SNAPSHOT

CURRENT INFORCE CHARGES

RETROACTIVITY

ADJUSTMENTS

OTHER CHARGES/FEEs

REBILL REQUEST SUMMARY

Pay Invoice

Print Invoice

Request a Rebill

Add a member to Invoice

Account Name

HEALTH & BEAUTY GROUP INC

Account Number/Bill Package

87510604 / 1002

Payment Due Date

03/01/2017

Balance

\$1,039.50

Invoice #

H4482162

Prepared Date

02/14/2017

Coverage Period

03/01/2017-03/31/2017

Triad

E23B

Billing Questions Contact

800-555-1234

Bill Package Name

HEALTH & BEAUTY GROUP INC

Rebills Requested

Invoice Level

Billing Period

Requested Date

You can check the status of rebill invoices on the *Rebill Request Summary* tab of the *Invoice Details* page. The following list provides brief explanation of rebill statuses.

- *Approved* status indicates that your rebill request submitted successfully. Recalculated invoice(s) should be available within four business days from the date of your request.
- A red exclamation point indicates that the rebill request is denied and displays a message indicating the reason for denial of the request.

Rebills Requested	Invoice Level	Billing Period	Requested Date
 H4105967	89750895 / 1001	01/01/2017-01/31/2017	12/17/2016
A payment has been completed against this invoice. A rebill is not available.			

Reasons a rebill can be denied include:

- A completed payment has been made against the invoice.
- A rebill for the invoice has already been requested. Contact the billing department on the invoice to ask questions or get additional information.
- The rebill request was submitted too close to the date of the next scheduled invoice (within five days).
- A system error indicates that eBilling is experiencing an issue. Try to submit the rebill request again later.

After the re-billed invoice generates, the invoice number displayed on the *Invoice Details* is updated to include the word "Rebill."



Upon termination, the option to request a rebill is no longer available.

Making Invoice Adjustments

Depending on your group's configurations, you may be able to make adjustments to your invoice to reflect changes since your last billing cycle. You can access adjustments from the *Invoice Details* page. Adjustments typically display on the following month's invoice as either a credit or a debit.

Follow the steps below to make an invoice adjustment.

1. View an invoice. See [Viewing Invoices](#) for additional information.
2. On the *Invoice Details* page, click *Make Adjustments*.

Invoice Details

[View Invoices](#)
[Search Invoices](#)
[Adjustments](#)
[Payment History](#)

[Billing Totals](#)
[Summary](#)
[Current Premiums](#)
[Retroactivity](#)
[Online Adjustments](#)
[Manual AR](#)

Consolidated Invoice View

[Pay Invoice](#)
[Make Adjustments](#)
[Print invoice](#)

Bob's Garage	Group #	123456789	Payment Due Date:	02/01/2017
123 Main Street	Invoice Date:	01/15/2017	Total Amount Due:	\$3,790.00
Suite A	Billing Period:	02/01/2017-02/28/2017		
Corporate Headquarters				
Greenville, SC 29607				



You can also click *Make Adjustments* on the current invoice displayed on the *Home* page. If your group utilizes consolidated billing, select *Make Consolidated Adjustments* on the consolidated bill or select *Show Individual Invoices*, then select *Make Adjustments*.

Home

Your last login was 09/28/2017 at 04:02:01 PM EST

Your Current 02/01/2017 Invoices

Bob's Garage
123456789

\$4,030.00
Adjusted Amount Due

Payment Due Date:	02/01/2017
Invoice Date:	01/15/2017
Billing Period:	02/01/2017-02/28/2017

[Make a Payment](#)
[Print Invoices](#)
[View Consolidated Details](#)
[Make Consolidated Adjustments](#)

Individual Invoices (4)
[Show Individual Invoices](#)

A message displays describing the adjustment process.

You have been taken to the CURRENT INFORCE CHARGES tab. The table below contains a list of current subscribers and their benefits on the invoice. Adjustments are performed on the subscribers listed on the CURRENT INFORCE CHARGES tab.

To log an adjustment, perform the following:

1. Select the *Options* button next to the subscriber's name.
2. Select *Make Adjustment*.
3. Answer the adjustment questions and complete the adjustment form.
4. After reviewing the final adjustment information, select *Save*.

☐ Do not show me this again

Continue

If you do not wish to receive this message in the future, select *Do not show me this again* and click *Continue*. The *Current Premiums* tab displays listing current members and their premiums.

Billing Totals Summary **Current Premiums** Retroactivity Online Adjustments Manual AR

Consolidated Invoice View

Pay invoice Make Adjustments Print invoice

Bob's Garage Group # 123456789 Payment Due Date: 02/01/2017
 123 Main Street Invoice Date: 01/15/2017 Total Amount Due: \$0.00
 Suite A Billing Period: 02/01/2017-02/28/2017
 Corporate Headquarters
 Greenville, SC 29607

Details

Find By Please Select Search Reset

8 Items | 1 - 8 | Advanced Sorting Expand All Collapse All

	SUBSCRIBER SSN	SUBSCRIBER ID	MEMBER ID	MEMBER SSN	LAST NAME	FIRST NAME	MI	RELATIONSHIP	AGE	Subgroup #	Description	Contract Type	PREMIUM AMOUNT
Options +	*****0006	000-00-0006			Davidson	Mark	C	Subscriber Total					\$230.00
Options +	*****0008	000-00-0008			Jennings	Steve	A	Subscriber Total					\$625.00
Options +	*****0002	000-00-0002			James	James	B	Subscriber Total					\$500.00

3. Click *Options* for a subscriber in the *Details* section and select *Make Adjustment*. (You may need to expand a subscriber record or select *Make/View Adjustments* first.)

Details

Find By Please Select Search Reset

8 Items | 1 - 8 | Advanced Sorting Expand All Collapse All

	SUBSCRIBER SSN	SUBSCRIBER ID	MEMBER ID	MEMBER SSN	LAST NAME	FIRST NAME	MI	RELATIONSHIP	AGE	Subgroup #	Description	Contract Type	PREMIUM AMOUNT
Options +	*****0006	000-00-0006			Davidson	Mark	C	Subscriber Total					\$230.00
Options -	*****0008	000-00-0008			Jennings	Steve	A	Subscriber Total					\$625.00
Options	*****0008	000-00-0008			Jennings	Steve	A			0001	Dental	Employee + Family	\$50.00
Make Adjustment	*****0008	000-00-0008			Jennings	Steve	A				PPO	Product Total	\$575.00
Options ✓	*****0008	000-00-0008	000-00-0008	*****0008	Jennings	Steve	A	Subscriber	40	001	PPO	Employee + Family	\$250.00
Options ✓		000-00-0008	000-00-0008	000-000-008	Jennings	Amy	A	Spouse	38	001	PPO	Employee + Family	\$225.00
Options ✓		000-00-0008	000-000-0088	000-000-008	Jennings	Jason	A	Child	12	001	PPO	Employee + Family	\$100.00

The *Request Adjustment* page displays.

Request Adjustment

You are requesting an adjustment to invoice:

Bob's Garage	Group #	123456789	Payment Due Date:	02/01/2017
123 Main Street	Invoice Date:	01/15/2017	Total Amount Due:	\$0.00
Suite A	Billing Period:	02/01/2017-02/28/2017		
Corporate Headquarters				
Greenville, SC 29607				

☐	SSN	FIRST NAME	Middle Initial	LAST NAME	Plan Name	Benefit Type	Amount
☐	*****0008	Steve	A	Jennings	Dental	Employee + Family	\$50.00
☐	*****0008	Steve	A	Jennings	PPO	Employee + Family	\$250.00
☐	*****0008	Amy	A	Jennings	PPO	Employee + Family	\$225.00
☐	*****0008	Jason	A	Jennings	PPO	Employee + Family	\$100.00

Next **Cancel**

- (If applicable) Select the subscriber and plan to be adjusted and select *Next*.
- Select the type of adjustment to be made from the *Please select the type of adjustment you would like to make* drop-down box and click *Next*.

Please select the type of adjustment you would like to make

Other Changes

Next **Back** **Cancel**

- Select the change reason from the *Please select the reason for this adjustment* drop-down box and click *Next*.

Please select the type of adjustment you would like to make

Other Changes

Please select the reason for this adjustment

Other Reason for Adjustment

Next **Back** **Cancel**

- Enter the required information such as *New Premium Amount* and *Effective Date of Change*, then click *Next*.

To complete the benefit enrollment for the subscriber below, please click the "View Enrollment" link in the Options drop down next to the Subscriber's name on the CURRENT PREMIUMS Tab.

* = Required Fields

SSN	****0008
Subscriber ID	000-00-0008
Member ID	000-00-0008
Last Name	Jennings
First Name	Steve
MI	A
Relationship	Subscriber
Age	40
Contract Type	Employee + Family
Description	PPO
New Contract Type *	Employee + Family
New Description	
Effective Date of Change *	09/28/2017
	(mm/dd/yyyy)
Premium Amount	\$250.00
Premium Amount	\$225.00
Premium Amount	\$100.00
New Premium Amount *	250
New Premium Amount *	0
New Premium Amount *	100
Adjusted Premium Amount *	350
Notes	



If applicable, click *Note Dependent* and enter the required dependent information.

Dependents Affected					
Dependent SSN	Dependent Last Name	Dependent First Name	Dependent MI	Dependent Relationship	Dependent Date Of Birth
No Dependents have been added					
Note Dependent					

The *Request Adjustment* summary displays.

Request Adjustment

You are requesting an adjustment to invoice:

Bob's Garage
123 Main Street
Suite A
Corporate Headquarters
Greenville, SC 29607

Group #
123456789
Invoice Date:
01/15/2017
Billing Period:
02/01/2017-02/28/2017

Payment Due Date:
02/01/2017
Total Amount Due:
\$0.00

	SSN	FIRST NAME	Middle Initial	LAST NAME	Plan Name	Benefit Type	Amount
☐	*****0008	Steve	A	Jennings	Dental	Employee + Family	\$50.00
☒	*****0008	Steve	A	Jennings	PPO	Employee + Family	\$250.00
☒	*****0008	Amy	A	Jennings	PPO	Employee + Family	\$225.00
☒	*****0008	Jason	A	Jennings	PPO	Employee + Family	\$100.00

• Please select the type of adjustment you would like to make

Cancellations

• Please select the reason for this adjustment

Cancel Spouse/Domestic Partner

To complete the benefit enrollment for the subscriber below, please click the "View Enrollment" link in the Options drop down next to the Subscriber's name on the CURRENT PREMIUMS Tab.

SSN *****0008

Subscriber ID 000-00-0008

Member ID 000-00-0008

Last Name Jennings

First Name Steve

MI A

Relationship Subscriber

Age 40

Contract Type Employee + Family

Description PPO

New Contract Type Employee + Family

New Description

Effective Date of Change 09/28/2017

Premium Amount \$250.00

Premium Amount \$225.00

Premium Amount \$100.00

New Premium Amount \$250.00

New Premium Amount \$0.00

New Premium Amount \$100.00

Adjusted Premium Amount \$350.00

Notes

Save
Back
Cancel

8. Review the adjustment information and click *Save*.

The *Current Premiums* tab displays. A green check mark indicates that an adjustment has been made to the current charges on the invoice.

Chapter 3

Reports

You can generate invoice and payment reports on the *Reports* tab. The *Reports* tab includes three sub tabs:

- The *Create Reports* tab displays all available reports. Selecting Create for a report will present filter criteria and format options for the report. You can create a one-time report or schedule reports to run at specific time intervals.
- The *Completed Reports* tab displays all the reports generated within a specified number of days as established for your company.
- The *Scheduled Reports* tab displays all reports scheduled to run on a specific start and end date. You can edit or delete reports from the schedule as necessary.

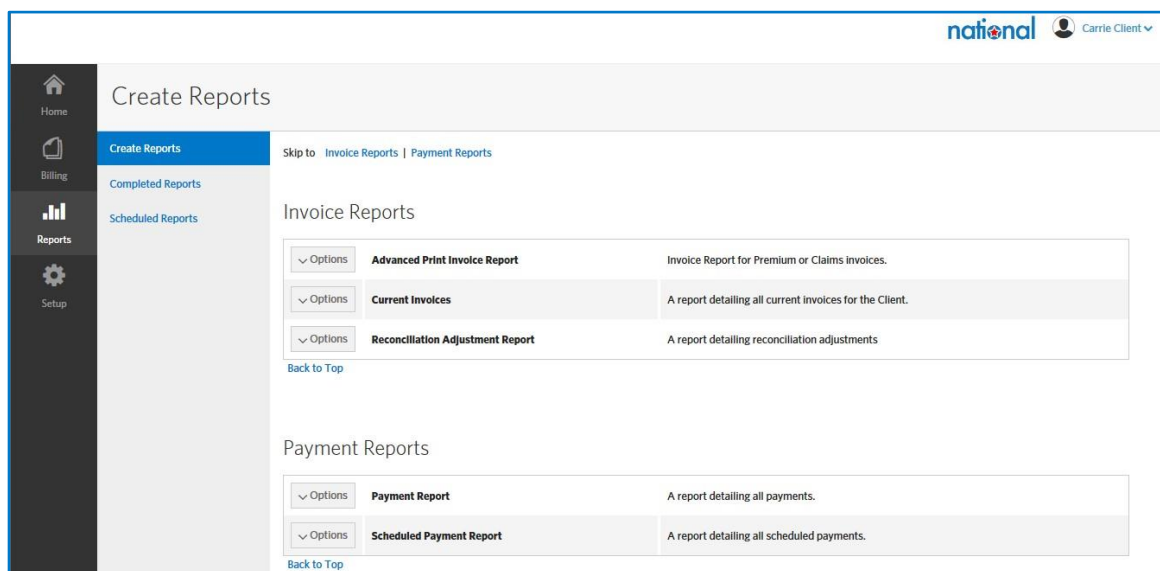
Managing Reports

You can create and schedule invoice and payment reports on the *Create Reports* tab.

Creating a Report

Follow these steps to create a report.

1. Click the *Reports* tab on the navigation bar. The *Create Reports* page displays. Reports are categorized as *Invoice Reports* or *Payment Reports*.



2. Click *Options* and select *Create* for the report to be generated.

Create Reports

Skip to [Invoice Reports](#) | [Payment Reports](#)

Invoice Reports

Advanced Print Invoice Report Invoice Report for Premium or Claims invoices.

Current Invoices A report detailing all current invoices for the Client.

Adjustment Report A report detailing reconciliation adjustments

[Back to Top](#)

The *Create a Report* page displays.

Create a Report

Filter Format

Current Invoices

Subgroup #

Invoice Date *

Invoice #

Payment Due Date *

Group Status

* = Required Fields

- Enter the report parameters and click *Next*. The *Report Format* page displays.

Report Format

Create Reports
Completed Reports
Scheduled Reports

Filter
Format

Current Invoices

Report Format: CSV
Sort By: Payment Due Date
Order: Ascending
Then By:
Order: Ascending

☐ Subtotal by sorted column
☐ Subtotal by sorted column
☐ Include grand total.
☐ Include totals at the top of the report

Report Name:

Schedule Report (All scheduled reports will be available to review every morning by 8 am ET)
☐ Run this report on a regular schedule

Maintain report duration until:
Run report every: -- Select --

Submit
Back
Cancel

- Enter or select the formatting options, including the *Report Format* (CSV, PDF or HTML) and the sorting options.

Note Because this scenario describes the on-demand report generation process, do not select the *Run this report on a regular schedule* option. See [Scheduling Reports](#) for additional information.

- Click *Submit*. The *Completed Reports* page displays.

Completed Reports

Create Reports
Completed Reports
Scheduled Reports

Refresh Reports

2 Items | 1 - 2

	Report Name	Status	Date	Format	Size
Options	Invoices to Date for Year	COMPLETE	09/29/2017 09:58:15 AM ET	PDF	6 Kb
Options	Last Month Invoice	PENDING	09/29/2017 09:59:06 AM ET	CSV	0 Kb

2 Items | 1 - 2

Please note: Reports older than 7 days will be automatically deleted.

The report *Status* will display as *PENDING* or *RUNNING* while generating the results. Depending on the size and complexity of the report, it may take a few minutes to generate the results. You can click *Refresh Reports* to refresh the page and display the current status. When the report is complete the *Status* will display as *COMPLETE*.

Create Reports

Completed Reports

Scheduled Reports

If any of these reports have a status of 'Running', please click the 'Refresh Reports' button to refresh the table. Please use 'Scheduled Reports' for larger reports since they can take longer to run.

Refresh Reports

2 Items | 1 - 2

Report Name	Status	Date	Format	Size
Options Invoices to Date for Year	COMPLETE	09/29/2017 09:58:15 AM ET	PDF	6 Kb
Options Last Month Invoice	PENDING	09/29/2017 09:59:06 AM ET	CSV	0 Kb

2 Items | 1 - 2

Please note: Reports older than 7 days will be automatically deleted.

- Click *Options* and select *Download* to download a copy of the report.

Create Reports

Completed Reports

Scheduled Reports

If any of these reports have a status of 'Running', please click the 'Refresh Reports' button to refresh the table. Please use 'Scheduled Reports' for larger reports since they can take longer to run.

Refresh Reports

2 Items | 1 - 2

Report Name	Status	Date	Format	Size
Options Invoices to Date for Year	COMPLETE	09/29/2017 09:58:15 AM ET	PDF	6 Kb
Options Last Month Invoice	COMPLETE	09/29/2017 09:59:14 AM ET	CSV	1 Kb

2 Items | 1 - 2

Please note: Reports older than 7 days will be automatically deleted.

The report output downloads and displays.

national

National Insurance

Current Invoices

Report Format: PDF

Generated On: 09/29/2017 09:58:07 AM EDT

Filter:

Invoice Date is 12/01/2016 - 09/28/2017

Payment Due Date is 01/01/2017 - 09/28/2017

Group Status is Both

Subgroup #	Invoice Date	Billing Period	Invoice #	Payment Due Date	Total Amount Due
0002	01/15/2017	02/01/2017-02/28/2017	5435	02/01/2017	\$2,449.35
0001	01/15/2017	02/01/2017-02/28/2017	6578	02/01/2017	\$13,197.02
Grand Total					\$15,646.37

Viewing Reports

You can view the status of reports and download for up to a specified number of days as determined by your company after the report is generated. Reports are automatically deleted after the specified number of days. The number of days is indicated below the table on the *Completed Reports* and *Scheduled Reports* tab.

To view reports, complete the following steps.

1. Click the *Reports* tab in the main navigation bar.
2. Click the *Completed Reports* tab.

The *Completed Reports* page displays.

Completed Reports

Create Reports

Completed Reports

Scheduled Reports

Refresh Reports

2 Items | 1 - 2

Report Name	Status	Date	Format	Size
Invoices to Date for Year	COMPLETE	09/29/2017 09:58:15 AM ET	PDF	6 Kb
Last Month Invoice	COMPLETE	09/29/2017 09:59:14 AM ET	CSV	1 Kb

2 Items | 1 - 2

Please note: Reports older than 7 days will be automatically deleted.

3. View the status of your reports.
4. Click *Options*, then select *Download*.

Completed Reports

Create Reports

Completed Reports

Scheduled Reports

Refresh Reports

2 Items | 1 - 2

Report Name	Status	Date	Format	Size
Invoices to Date for Year	COMPLETE	09/29/2017 09:58:15 AM ET	PDF	6 Kb
Last Month Invoice	COMPLETE	09/29/2017 09:59:14 AM ET	CSV	1 Kb

2 Items | 1 - 2

Please note: Reports older than 7 days will be automatically deleted.

Scheduling a Report

In addition to creating on-demand reports, you can also schedule reports to run at a regular interval. For example, once a week or once a month. You can create a schedule for any of the reports available to you.

If another scheduled report runs during the specified time period for a scheduled report, eBilling creates another instance of the report rather than replacing the previously-generated report.

The process for scheduling a report is almost identical to the process of creating an on-demand report, but a scheduled report includes some additional parameters. See [Creating a Report](#) for additional information.

To schedule a report, select the *Run this report on a regular schedule* option on the *Report Format* page.

You can then enter the scheduling parameters to indicate how frequently you would like to run the report. The default value for the *Run report every* drop-down box is *Day*. You must enter a *Report Name* when setting up a report schedule.

If daily is the selected frequency, you can also specify how frequently you want the report to recur.

When scheduling the report weekly, you can specify which days of the week the report generates.

When scheduling the report monthly, you can specify which day of the month the report generates.

Schedule Report (All scheduled reports will be available to review every morning by 8 am ET)

☒ Run this report on a regular schedule

Maintain report duration until

Run report every

Recur every day of every month

Click *Submit*. The *Create Reports* page displays a confirmation.

Create Reports

[Create Reports](#)
[Completed Reports](#)
[Scheduled Reports](#)

Your report has been scheduled
[Skip to Invoice Reports](#) | [Payment Reports](#)

Invoice Reports

Options	Open Invoices	A report detailing all open invoices.
Options	Reconciliation Adjustment Report	A report detailing reconciliation adjustments
Options	Retroactivity Report	A report detailing retroactivity information.
Options	Subscriber Detail Report	A report detailing roster information.

[Back to Top](#)

To view scheduled reports, click the *Scheduled Reports* tab.

Create Reports

[Create Reports](#)
[Completed Reports](#)
[Scheduled Reports](#)

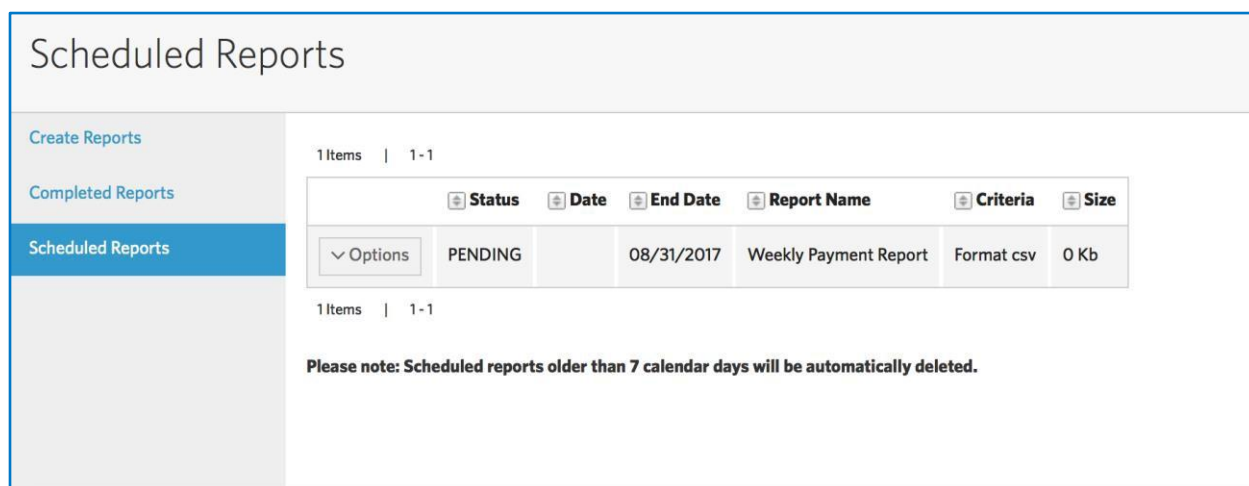
[Skip to Invoice Reports](#) | [Payment Reports](#)

Invoice Reports

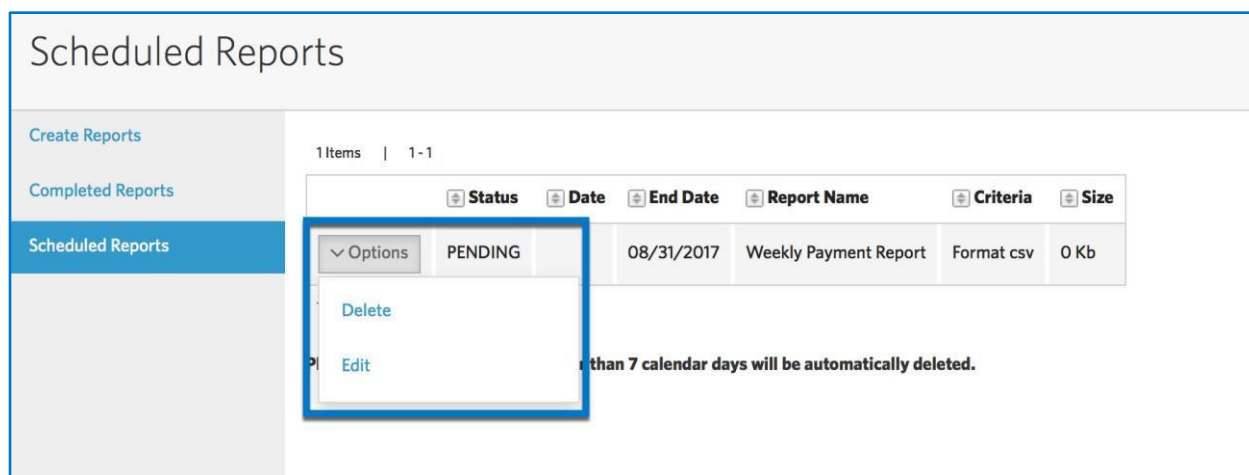
Options	Open Invoices	A report detailing all open invoices.
Options	Reconciliation Adjustment Report	A report detailing reconciliation adjustments
Options	Retroactivity Report	A report detailing retroactivity information.
Options	Subscriber Detail Report	A report detailing roster information.

[Back to Top](#)

The *Scheduled Reports* page displays.



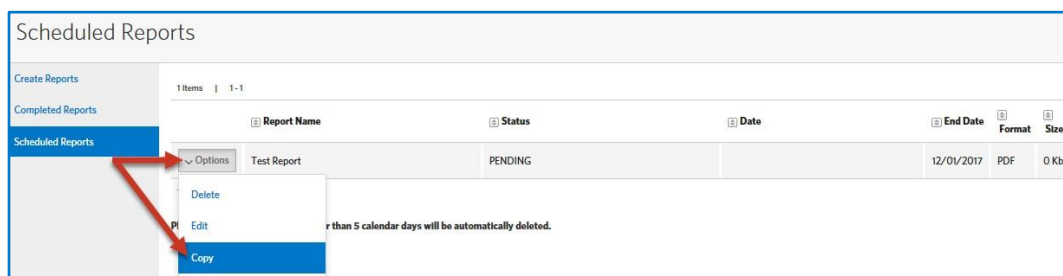
The scheduled report displays a *Status* of *Pending* until the report generates. The status will then update to *Complete*. After viewing a report, the status updates to *Viewed*. View the status of scheduled reports and edit or delete as necessary.



Sharing a Scheduled Report

You can copy recurring report criteria to other users. Reports can only be copied to users who have rights to the specific report being shared and users who have rights to the groups on the report. Once the report criteria has been shared, the user who receives the criteria will see the shared information under the Scheduled Reports tab.

1. Create a *Scheduled Report*. See the [Scheduling a Report](#) section for more information
2. Select *Copy* from the *Options* button for the report you want to share on the *Scheduled Reports* tab.



3. Enter the last name of the user with whom you are sharing the report, then click *Search*.

Copy Scheduled Reports

Create Reports

Completed Reports

Scheduled Reports

You are copying the scheduled report for Test Report

Search for a user by last name

Search

0 Items | 0 - 0

Select

First Name

Last Name

Copy

Cancel

- Select the user(s) from the list.

Copy Scheduled Reports

Create Reports

Completed Reports

Scheduled Reports

You are copying the scheduled report for Test Report

Search for a user by last name

Admin

Search

1 Items | 1 - 1

Select

First Name

Last Name

☒

Ben

Admin

Copy

Cancel

- Click *Copy*.

Chapter 4 Setup

You can create and edit payment account data, review payment accounts and audit account history, and manage user accounts on the *Setup* tab. Available options are dependent on the configurations set for your company and your account permissions.

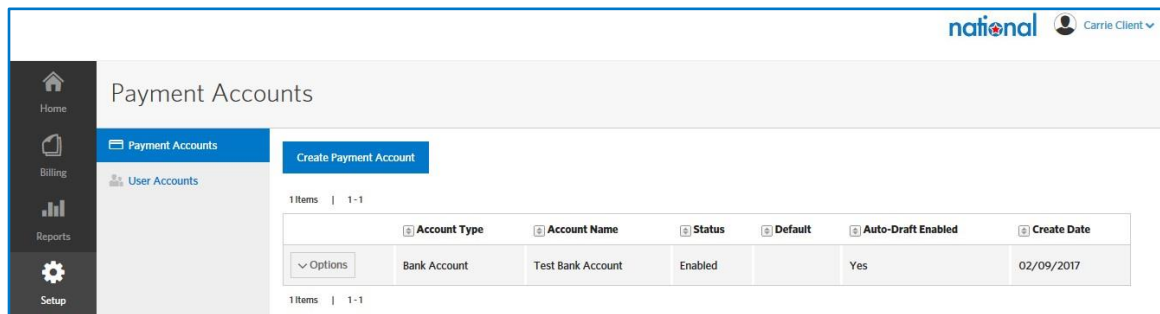
Creating and Editing Payment Accounts

Creating a Payment Account

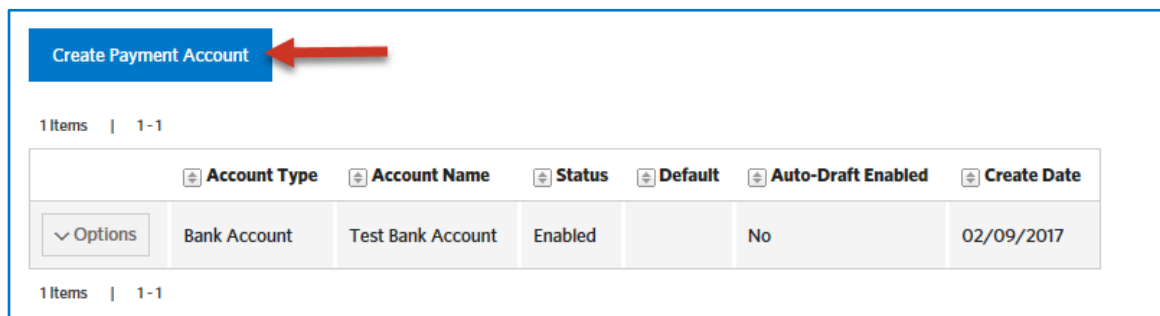
Payment accounts store banking or credit card account information for making invoice payments. You can create multiple payment accounts as needed and select different accounts when making invoice payments. See [Editing Payment Accounts on Invoices](#) for additional information.

Follow the steps below to create a payment account.

1. Click the *Setup* tab on the navigation bar. The *Payment Accounts* page displays.



2. Click the *Create Payment Account* button.



3. (If applicable) Select the account type, i.e. banking or credit card, then click *Submit*.

Create Payment Account

Payment Accounts

User Accounts

Basic Information

Invoice Restrictions

** = Required Fields*

Type of Account* 

- Enter the required account information.

Basic Information

Billing Information

Invoice Restrictions

** = Required Fields*

Type of Account* 

Credit Account Information

Account Name* Customized name for identifying the account

Credit Card Type*    

Card Holder's Name* Name as it appears on the credit card

Account Number*

Confirm Account Number*

Auto-Draft ☐

Auto-Draft Authorization Date:

Account Options

☒ Make this my default payment account

Auto-Draft

☒ I (we) hereby authorize National Insurance to initiate debit entries in the amount of my (our) monthly premium to my (our) checking account indicated below at the depository name below, hereinafter called "Depository," to debit the same such amount.

Auto-Draft Authorization Date: 09/29/2017 11:15:19 AM EST

Effective Date Start on  until canceled

Recurring Date  day of the month

5. Select the *Make this my default payment account* option in the *Account Options* section, if you want this account to be the default payment account.
6. (If applicable) Select *Only I can view/edit/use this account for payment* option if you want to limit the access and use of this payment account to only you.
7. (If applicable) Select the *Invoice Restrictions* tab, if you would like to restrict the account to only be used for specific invoices, such as for a particular billing group.

Basic Information Invoice Restrictions

Test Bank Account

Select the invoice levels that can access the account

☒ Restrict access to this account by system and invoice level

Use drop down to select invoice levels per enabled system

System: 

2 Items | 1 - 2

☒	Group #	Subgroup #	Auto-draft enabled?
☒	789012345	0001	
☒		0002	

2 Items | 1 - 2

8. Click *Save*. The account information is saved and a confirmation displays.

Edit Payment Account

 Payment Accounts Edit Payment Account

Saved

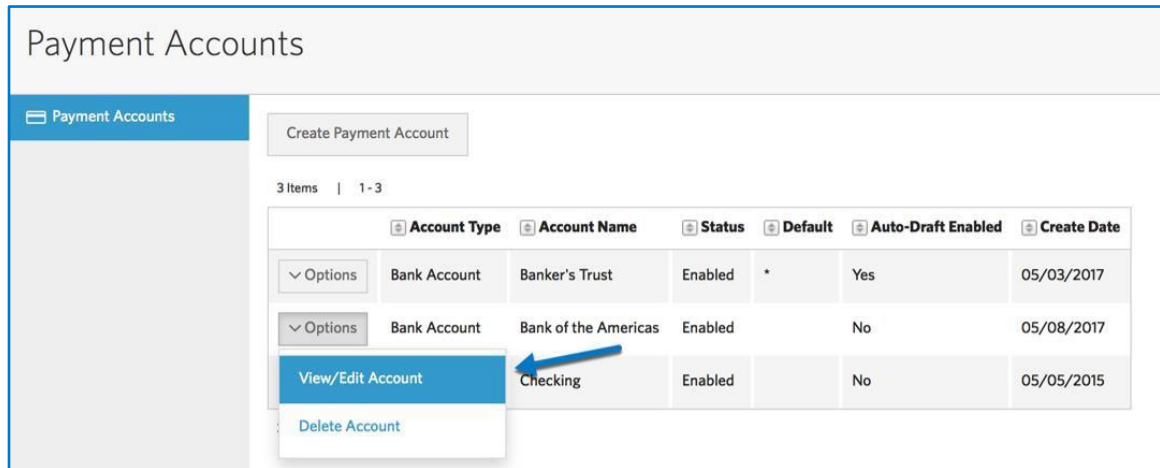
Your payment account was submitted successfully.
[Return to Payment Accounts](#) | [Return Home](#)

Click *Return to Payment Accounts* or *Return Home* to continue.

Editing a Payment Account

Follow the steps below to edit a payment account.

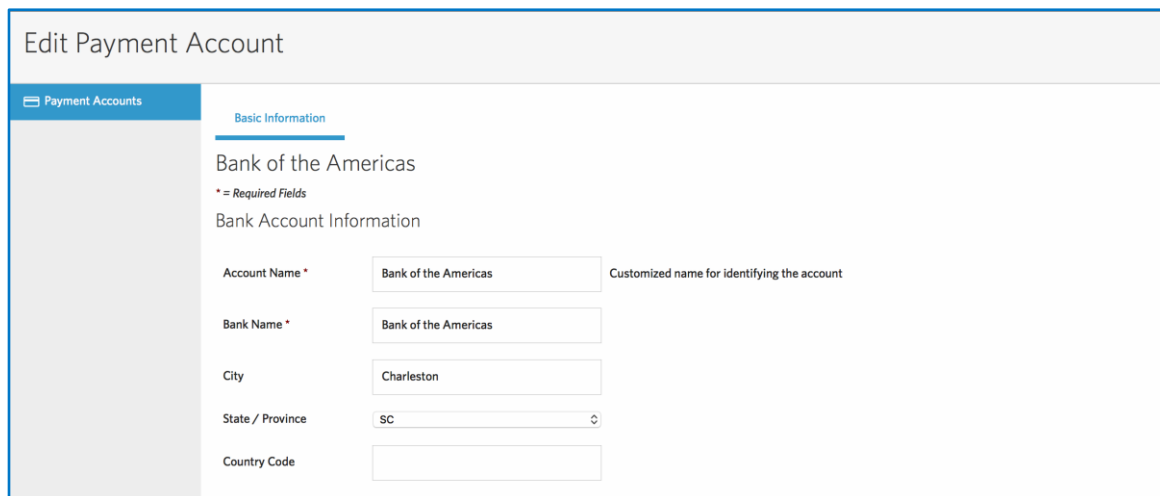
1. Click the *Setup* tab in the main navigation bar.
2. Click *Options* and select *View/Edit Account* for the account to be edited on the *Payment Accounts* page.



The screenshot shows the 'Payment Accounts' page. On the left is a navigation bar with 'Payment Accounts' selected. The main content area has a 'Create Payment Account' button and a table of 3 items. The table has columns: Account Type, Account Name, Status, Default, Auto-Draft Enabled, and Create Date. The first two rows are for 'Bank Account' types. The third row is for a 'Checking' account, and its 'Options' menu is open, showing 'View/Edit Account' (highlighted with a blue arrow) and 'Delete Account'.

	Account Type	Account Name	Status	Default	Auto-Draft Enabled	Create Date
Options	Bank Account	Banker's Trust	Enabled	*	Yes	05/03/2017
Options	Bank Account	Bank of the Americas	Enabled		No	05/08/2017
Options	Checking		Enabled		No	05/05/2015

The *Edit Payment Account* page displays.



The screenshot shows the 'Edit Payment Account' page. The 'Basic Information' tab is selected. The account name is 'Bank of the Americas'. Below is a section for 'Bank Account Information' with fields for Account Name, Bank Name, City, State/Province, and Country Code. The Account Name and Bank Name fields are pre-filled with 'Bank of the Americas'. The City field is pre-filled with 'Charleston'. The State/Province field is a dropdown menu with 'SC' selected. The Country Code field is empty.

Bank of the Americas

* = Required Fields

Bank Account Information

Account Name * Bank of the Americas Customized name for identifying the account

Bank Name * Bank of the Americas

City Charleston

State / Province SC

Country Code

3. Edit the account information as necessary. See [Creating a Payment Account](#) for additional information.



If this account is already being used to process payments, you can only change certain information, such as account type.

4. Click *Save*. A confirmation displays.

Edit Payment Account

Payment Accounts

Your information has been saved. [Return to Payment Accounts](#)

Basic Information

Bank of the Americas

* = Required Fields

Bank Account Information

Account Name * Customized name for identifying the account

Bank Name *

5. Click *Return to Payment Accounts* to continue.

Reviewing Payment Account History

eBilling maintains an audit history on all payment accounts. If your eBilling user account is configured with the appropriate permissions, you can view the audit history of any payment account.

The audit history information includes the login ID of the person to make change to the account, as well as the date and time of any changes.

Follow the steps below to view account history for a payment account.

1. Click *Options* and select *View/Edit Account* for the account on the *Payment Accounts* page.

The *Edit Payment Account* page displays. See [Editing a Payment Account](#) for additional information.

Edit Payment Account

Payment Accounts

Basic Information History

Bank of the Americas

* = Required Fields

Bank Account Information

Account Name * Customized name for identifying the account

Bank Name *

City

State / Province

Country Code

Account Type

Account Holder *

Routing Number *

2. Click *History*. The *Account History* window displays.

Account History ✕				
Advanced Search Reset Search				
	Action	Change	Change Date	Change By
View	Update	Multiple Changes	05/04/2017 11:55:16 AM EDT	SSO2940494000
View	Update	Default Account	05/04/2017 10:29:17 AM EDT	SSO2940494000
View	Update	Account Number	05/03/2017 04:23:05 PM EDT	SSO2940494000
View	Add	New Account	05/03/2017 04:16:54 PM EDT	SSO2940494000

If applicable, click *Advanced Search* to search for a specific transaction. Click *Reset Search* to remove the search criteria.

Account History				
Advanced Search Reset Search				
	Action	Change	Change Date	Change By
View	Update	Multiple Changes	05/04/2017 11:55:16 AM EDT	SSO2940494000

- Click *View* for a transaction to view the details.

Account History				
Advanced Search Reset Search				
	Action	Change	Change Date	Change By
View	Update	Multiple Changes	05/04/2017 11:55:16 AM EDT	SSO2940494000

The *Account History* details display. A green check mark indicates items that were updated for the transaction.

Account History

Change(s) made by SSO2940494000 on 05/04/2017

Back

Updated	Change	Old Value	New Value
	Account Name	Banker's Trust	Banker's Trust
	Bank Name	Banker's Trust	Banker's Trust
	Account Type	Checking	Checking
	Account Holder	Eliza Falge	Eliza Falge
	Routing Number	*****0680	*****0680
	Account Number	*****1552	*****1552
	Default Account	Yes	Yes
	Account Enablement	Yes	Yes
	Grant this account access to all invoice levels	Yes	Yes
✓	Auto-Draft Authorization	No	Yes
✓	Auto-Draft Effective Date		05/04/2017
	Only I can view/edit/use this account for payment	No	No
	Invoice Level Restrictions	view changes resulting from this update	

Click *view changes resulting from this update* to see details about any invoice level restriction changes associated with the transaction.

Invoice Level Restrictions

→

view changes resulting from this update

Click *Back* to return to the previous window.

Account History

Change(s) made by SSO2940494000 on 05/04/2017

Back

Action	Label System	Invoice Levels Before Change	Invoice Levels After Change
No Change	Small Group	89750895 / 1001	89750895 / 1001

Managing User Accounts

You can manage user accounts through the *Setup – User Accounts* tab. Note, you can only add and view users with the same or lower permission level as you.

Creating a User Account

1. Click *Setup* in the main navigation bar, then select the *User Account* tab in the secondary navigation.
2. Click the *Create User Account* button.

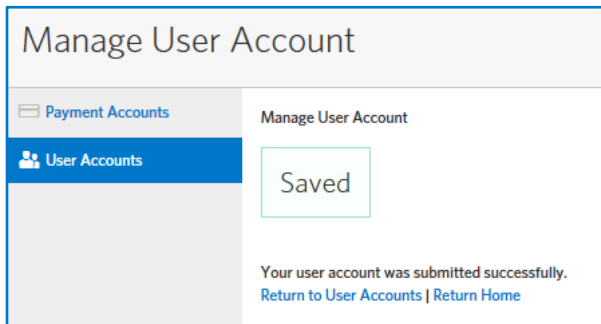
The screenshot shows the 'User Accounts' page. On the left is a dark navigation bar with icons for Home, Billing, Reports, and Setup. The 'Setup' icon (a gear) is highlighted with a red arrow. To the right of the navigation bar is a secondary navigation bar with tabs for 'Payment Accounts' and 'User Accounts'. The 'User Accounts' tab is highlighted with a red arrow. In the top right corner of the main content area, there is a button labeled 'Create User Account', also highlighted with a red arrow. Below this button is a 'General Search' section with input fields for First Name, Last Name, Login ID, and Email. At the bottom of the form are 'Submit' and 'Reset' buttons.

3. Enter the requested information on each of the tabs for the user account: *Name*, *Login*, *Security*, *System*, *Restrictions* and *Emails*. Required fields are indicated with an asterisk (*). Click *Next* after completing each tab.

The screenshot shows the 'Name' tab of the user account creation form. At the top, there are tabs for Name, Login, Security, System, Restrictions, and Emails. Below the tabs is a legend: '* = Required Fields'. The form contains several input fields: Prefix, First Name*, Middle Name, Last Name*, Suffix, Phone, Address 1, Address 2, Address 3, City*, State / Province* (a dropdown menu), Zip / Postal Code*, and Country Code. There are also fields for Email* and Confirm Email*. A note at the bottom states: 'To ensure timely notifications of new invoices and important system information, an email address is required.' At the bottom left are 'Next' and 'Cancel' buttons.

- **Name tab** - Enter the user's demographics on this tab. If the user will receive emails, as configured on the Emails tab, be sure to enter a valid email address for the user.

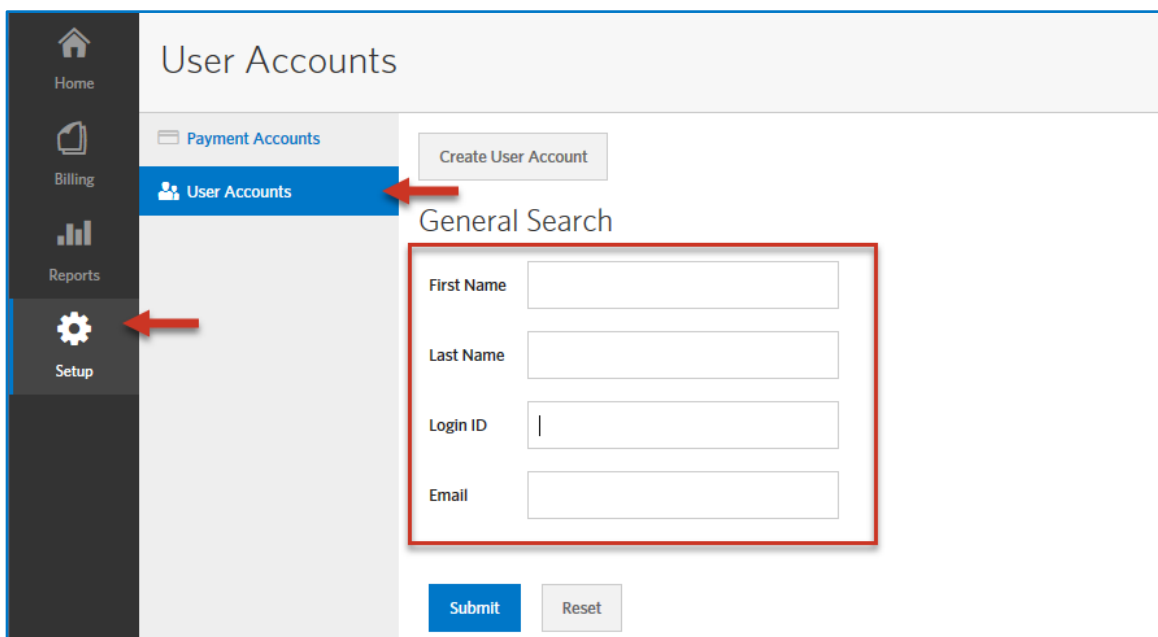
- *Login* tab - Click the help icon for *Username* and *Password* to view the username and password requirements. Ensure the *Enable Login* checkbox is selected to allow the user to log into the system.
4. Select *Save* once all tabs are complete. You will receive a confirmation message.



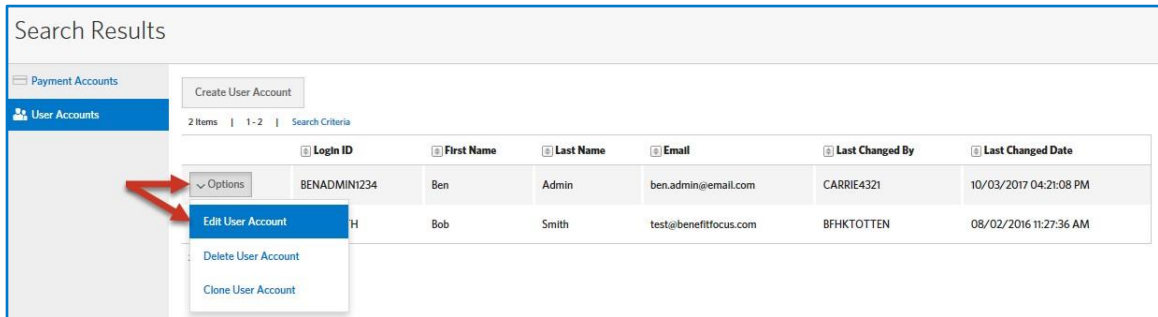
Editing a User Account

To update a user's account information, complete the following steps.

1. Click *Setup* in the main navigation bar, then select the *User Account* tab in the secondary navigation.
2. Search for the user account using any of the search fields. Click *Submit*. To search for all users, select *Submit* without entering any criteria in the search fields.



3. Select *Options*, then *Edit User Account* for the account to be updated on the *Search Results* page.

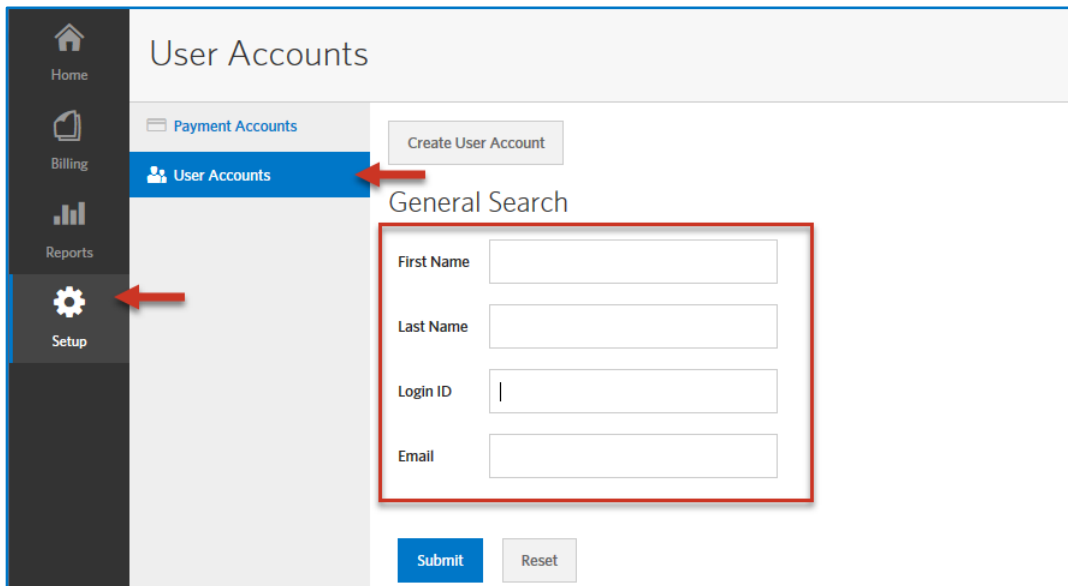


4. Navigate to any of the tabs that you need to update.
5. Select Save after making your changes.

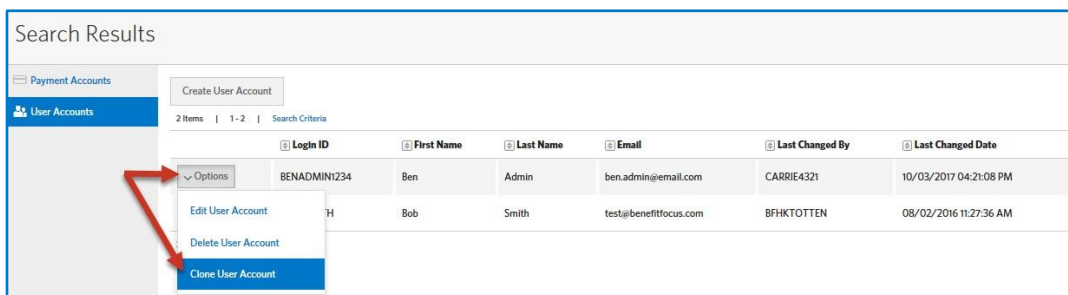
Cloning a User Account

You can copy information from one user account to another to quickly add new users to the system. This is particularly useful if you need to create several users with the same permission sets.

1. Click *Setup* in the main navigation bar, then select the *User Account* tab in the secondary navigation.
2. Search for the user account using any of the search fields. Click *Submit*. To search for all users, select *Submit* without entering any criteria in the search fields.



3. Select *Options*, then *Clone User Account* on the *Search Results* page for the account to be cloned.



4. Enter the unique demographic information for the new user on the *Name* tab, then click *Next*.

Name	Login	Security	System	Restrictions	Emails
* = Required Fields					
Prefix					Address 1
First Name*					Address 2
Middle Name					Address 3
Last Name*					City*
Suffix					State / Province* v
Phone					Zip / Postal Code*
	ex (123) 456-7890 				Country Code
Email *					
Confirm Email *					
To ensure timely notifications of new invoices and important system information, an email address is required.					
Next		Cancel			

5. Enter the *Username* and *Password* for the new user.
6. Update any additional information that should be updated on the remaining tabs. (Information is copied from the previous user.)
7. Click *Save*. You will receive a confirmation message.