EmployerAccess

A step-by-step guide for managing your health benefits online

anthem.com

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Here’s what EmployerAccess can do for you

EmployerAccess is the easiest way you can get fast access to the latest tools to help you better manage your plan.

- A one-stop solution to manage all your benefits, including adding, deleting or enrolling employees
- Smarter, faster and easier navigation
- Immediate notifications of any errors or missing information
- Online payment options

Other resources on the site include frequently asked questions and a demo on how to use your EmployerAccess tools and features.

Although you do not need to submit paper applications or change forms to Anthem, please keep copies to provide at a future date, if needed.

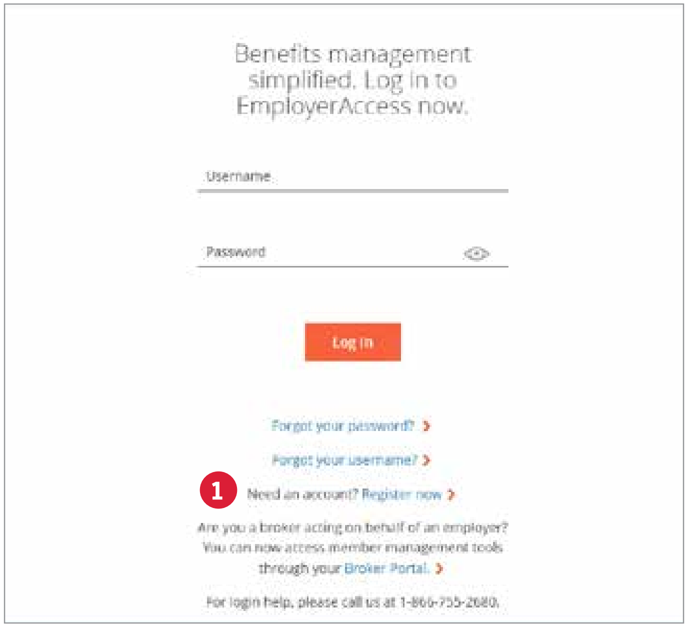
And be sure to keep this step-by-step manual handy to find answers anytime about managing your health benefits. You can also always reach out to your account representative if you have questions.

Save some ink and paper — and time! — with online bill pay

Fully insured groups can set up online bill pay

You can set up online bill pay at employer.anthem.com. It’ll take just a few minutes. After that, you’ll be able to pay your premiums quicker.

Getting started



1 Before you can use EmployerAccess, you may need to register at **employer.anthem.com**, where you'll create a user ID and password.

After you register, your request will be submitted for approval.

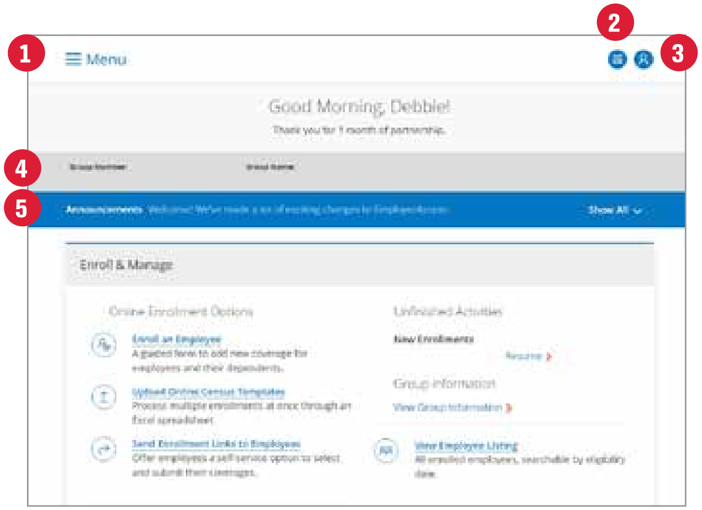
In some cases, an email will be sent to the main group administrator with a link to review and approve your request. If an email address is not on file for your group, an Anthem representative will review your request.

Once approved, you'll get an email with your temporary password.

Enter your user ID and case-sensitive temporary password.

After that, you'll be taken to the *Employer Portal*, where you can complete the usage agreement, enter your group information and choose what you want to do.

EmployerAccess dashboard



The EmployerAccess dashboard is where you can start the enrollment process, search for employees (subscribers) and check unfinished activities.

1. *Menu*
   Choose the different links to navigate EmployerAccess.

   The logo at the top of the page will bring you back to the dashboard from every page in EmployerAccess.

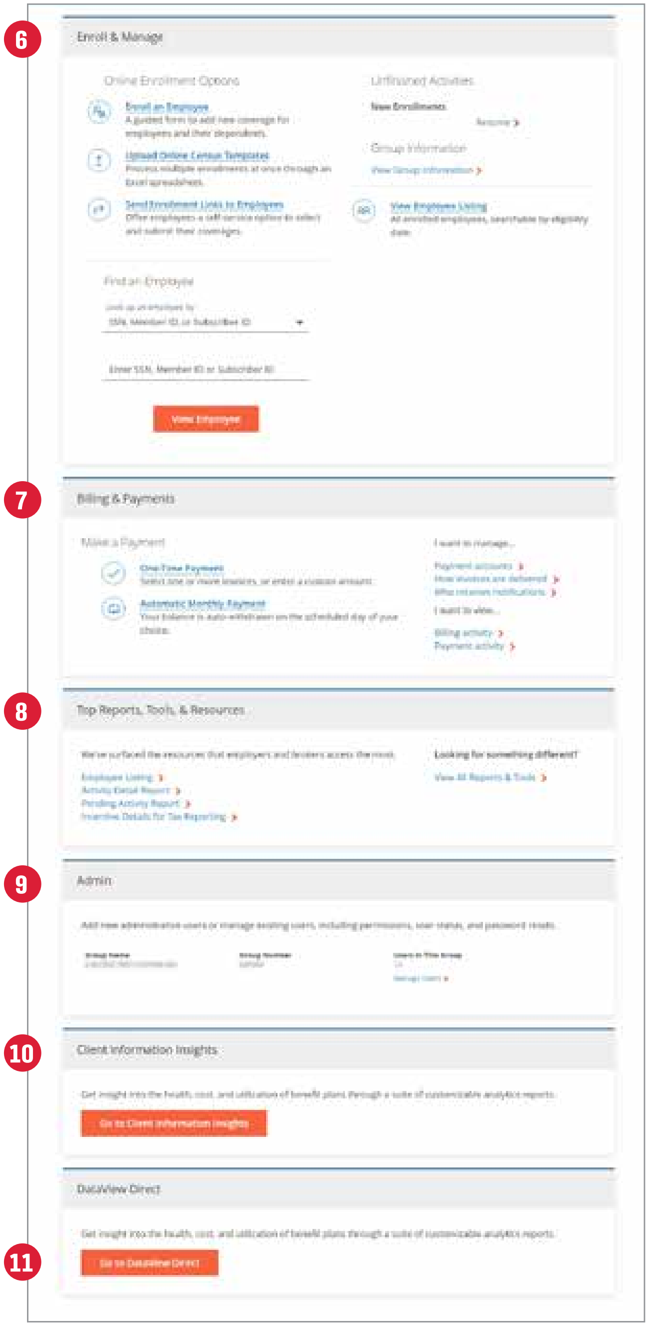
2. *Popular Tasks*
   Select this item for a list of tasks you use frequently.

3. *Profile*
   Use this icon to log out or update your user profile.

4. *Group information*
   The group number and group name you selected will appear at the top of every page. If you have access to multiple groups, you can choose a different group by selecting the **Switch** hyperlink.

5. *Announcements*
   Make sure you check this section often for important information like system updates, open enrollment details and helpful materials like frequently asked questions.

EmployerAccess dashboard, *continued*



6 *Enroll & Manage*
Here's where you can start the enrollment process, search for employees (subscribers), view important open enrollment dates, check for unfinished activities, view group information and benefits and access an employee listing showing all of your enrolled employees.

7 *Billing & Payments*
If you have billing access for a fully insured group, this is where you can make or schedule a payment, manage your account and view invoices and payment history.

8 *Top Reports & Resources*
This section provides easy access to the reports and resources you use most often.

9 *Admin*
As the site administrator for your group, you can use this section to access and manage the users for your group.

10 *Client Information Insights*
Only users who have access to these analytical reports will see this section. The reports include combined data about the health of your employee population and the costs associated with it.

11 *DataView Direct*
Only users who have access to these analytical reports will see this section.

Note: Transactions you save to complete later appear as *Unfinished Activities*. You also can access a report showing all unfinished activities from the *Top Reports & Resources* section.

New enrollment

Tips for adding new employees

General

- During your open enrollment period, an effective date will automatically be assigned if you select **Open Enrollment** as the enrollment reason.
- Although you don't need to submit paper applications or change forms to Anthem, please keep copies to provide at a future date if needed.
- An incorrect date of hire may create a wrong eligibility effective date. If that happens, you won't be able to correct the error through EmployerAccess. You'll need to contact your Enrollment and Billing representative to correct the date.
- After you submit the transaction, you'll get a message that it was successful. The processing date is the date when the information was successfully received.

Medical

- During open enrollment, you may make eligibility changes for:
  - **New enrollments**
  - **Add coverage**
  - **Add dependents**
  - **Change coverage**
  - **Enroll previously canceled employees**

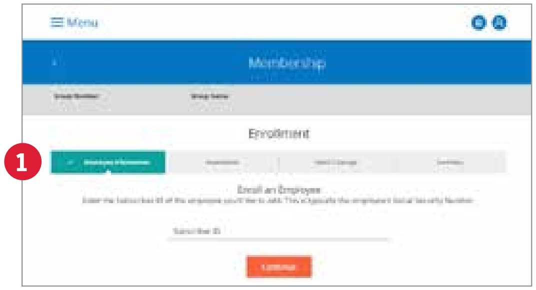
Life products

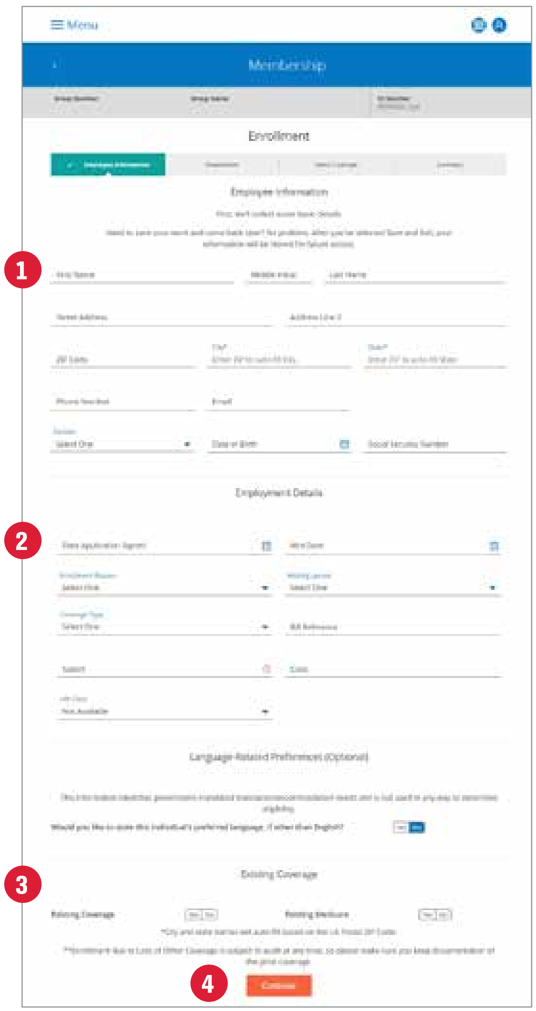
- Life products are not available for selection during open enrollment.
- Select **Basic Life** when enrolling an employee only in one or more life products.
- There might be a reduction in benefit amount for employees who are 65 or older.
- Life products are at the subscriber level only and dependents are never listed as covered within EmployerAccess.

Retroactive additions and retroactive terminations are allowed for most states. Please see your *Group Administrative Manual* for specific time frames. Changes after the specified time frame must be submitted directly to Enrollment and Billing, and require appropriate approvals. These transactions would be outside the timely submission guidelines and cannot be done through EmployerAccess.

If you have a fully insured group in Colorado, retro terminations are not permitted. The termination date entered must be the day after the termination is being processed or the first of the following month.

New enrollment, *continued*





As you move through the enrollment process, the steps will be highlighted and marked with a check mark, so you'll know where you are in the process. You'll need to complete all steps before you can submit an employee's application.

If at any time you choose **Save and Exit**, your work will be saved in *Unfinished Activities*. Once you've completed the steps, you'll see a message on the *Enrollment Confirmation* page to let you know you successfully completed the transaction.

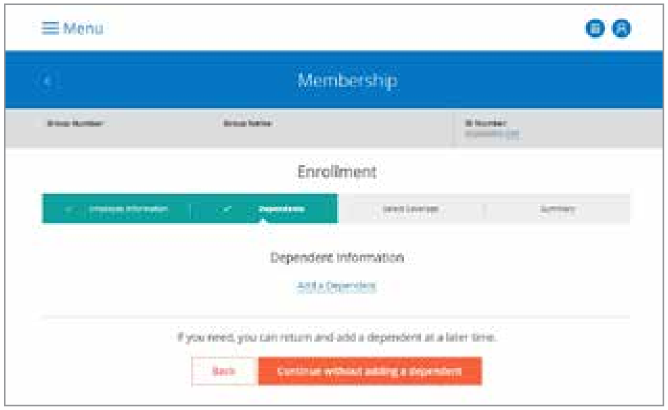
Step 1. Employee information

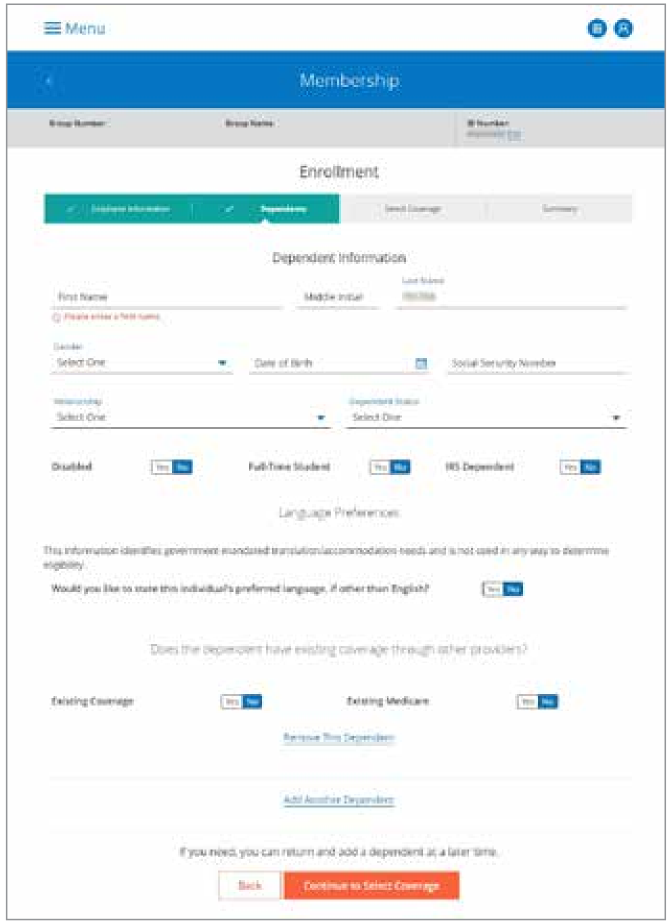
This is the page where you'll start the enrollment process.

1. To enroll an employee (subscriber), enter the Social Security number and the requested information in the Employee Information section of the form. You will be prompted to fill out required fields.
2. In the *Employment Details* section, enter the important dates, then select an enrollment reason and the appropriate waiting period. An effective date will be determined for you and displayed in a later step. During your open enrollment period, you will have the option to select **Open Enrollment** as your enrollment reason.

   Some groups will have the ability to assign their own effective dates and will not be required to select waiting periods.
3. Complete the *Existing Coverage* and *Existing Medicare* sections if your employee has other coverage.
4. When finished, select **Continue**. You will be prompted to add a dependent in the next step.

New enrollment, *continued*



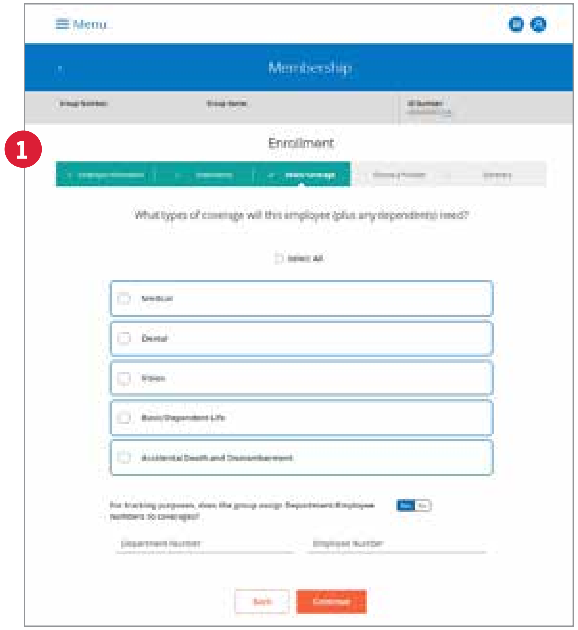


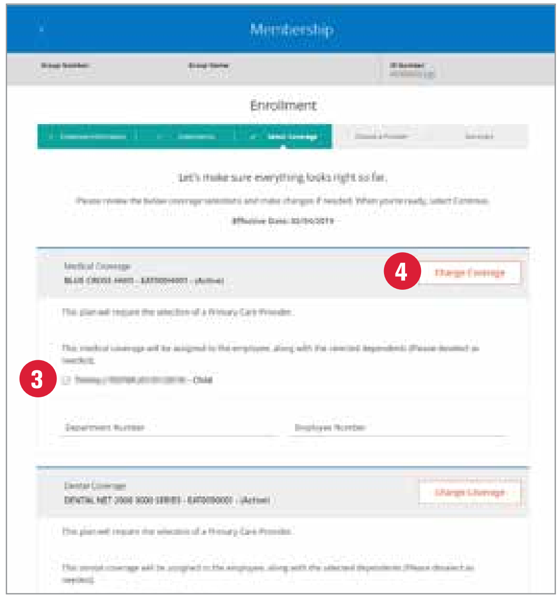
Step 2. Dependent information

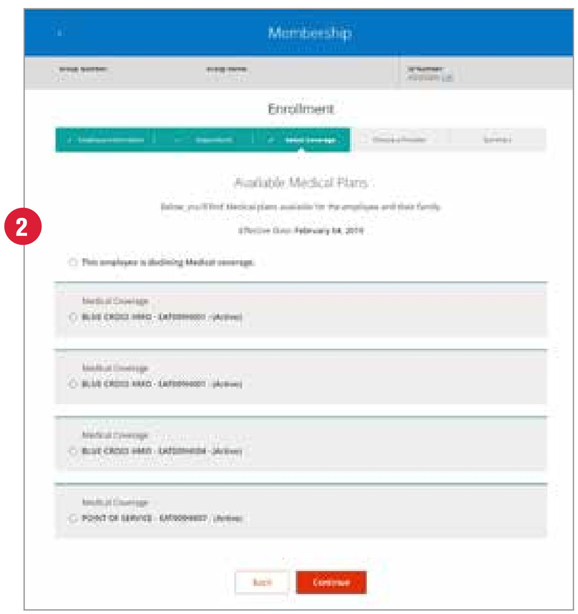
To add dependents to the employee's benefits, select the **Add a Dependent** link and fill out the fields for dependent information. Complete the information and choose **Add Another Dependent** for each dependent to enroll. When you're done, choose **Continue to select coverage**.

Note: Social Security numbers are required to add a spouse.

New enrollment, *continued*





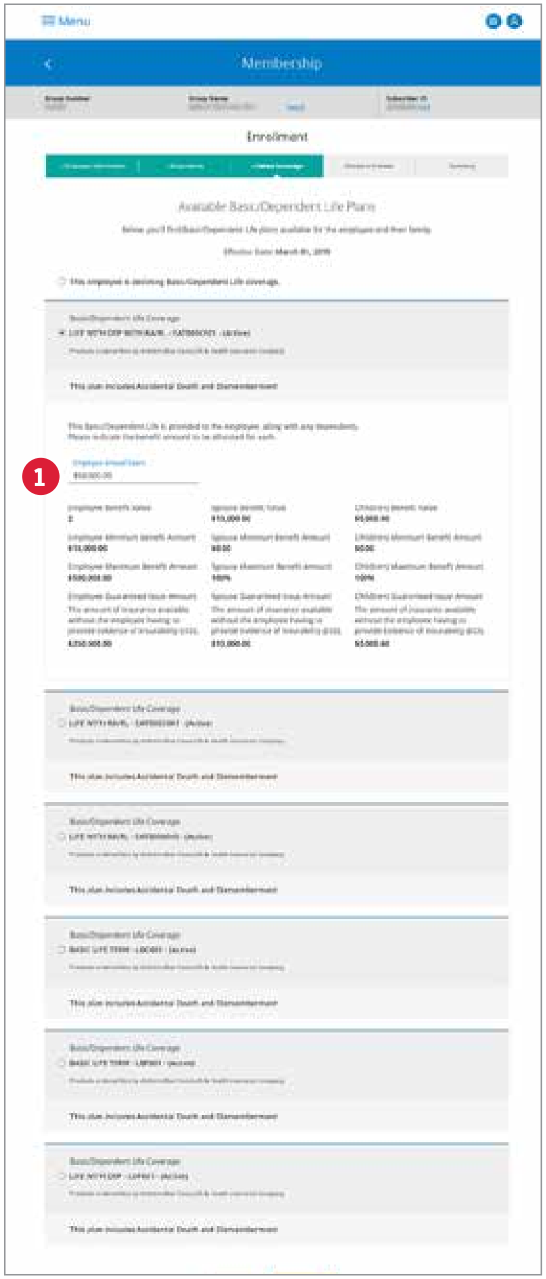


Step 3. Select coverage

1. Select the type of coverage the employee and their dependents will need.
2. On the next page, you'll be presented with an effective date and the available plans based on the coverage types you selected. Select the button for the appropriate medical, dental, vision, life and/or disability coverage.
3. The coverage you've chosen will be assigned to the employee and the selected dependents. Remember to deselect if coverage isn't needed for a dependent.
4. You will be presented with a review page that will allow you to make changes to your plan selections. If you missed something or selected the wrong benefit plan, you can make changes by selecting **Back** or **Change Coverage.**

If everything looks right, select **Continue.**

New enrollment, *continued*

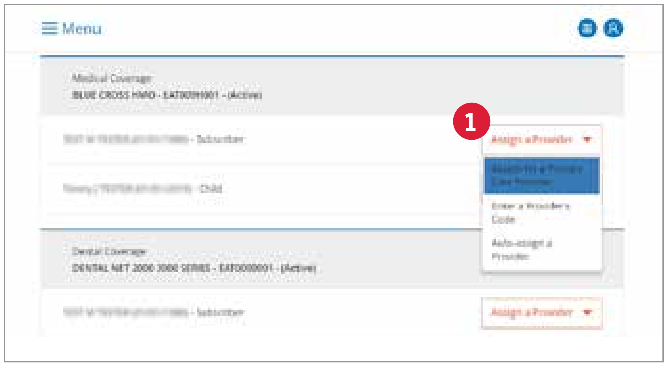


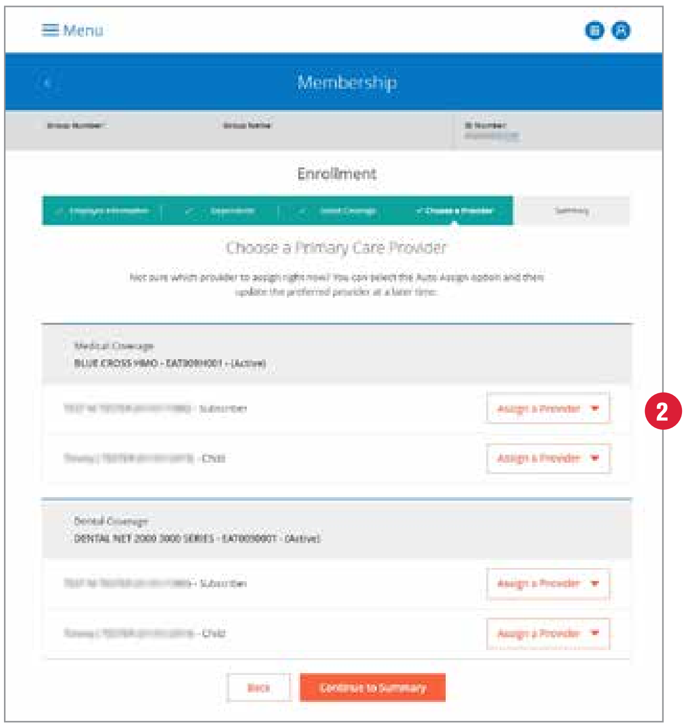
Step 4. Select coverage for life benefits

If life coverage was chosen, you'll be directed to this step.

1. Enter salary information for each plan when prompted.

New enrollment, *continued*





Step 5. Choose a provider

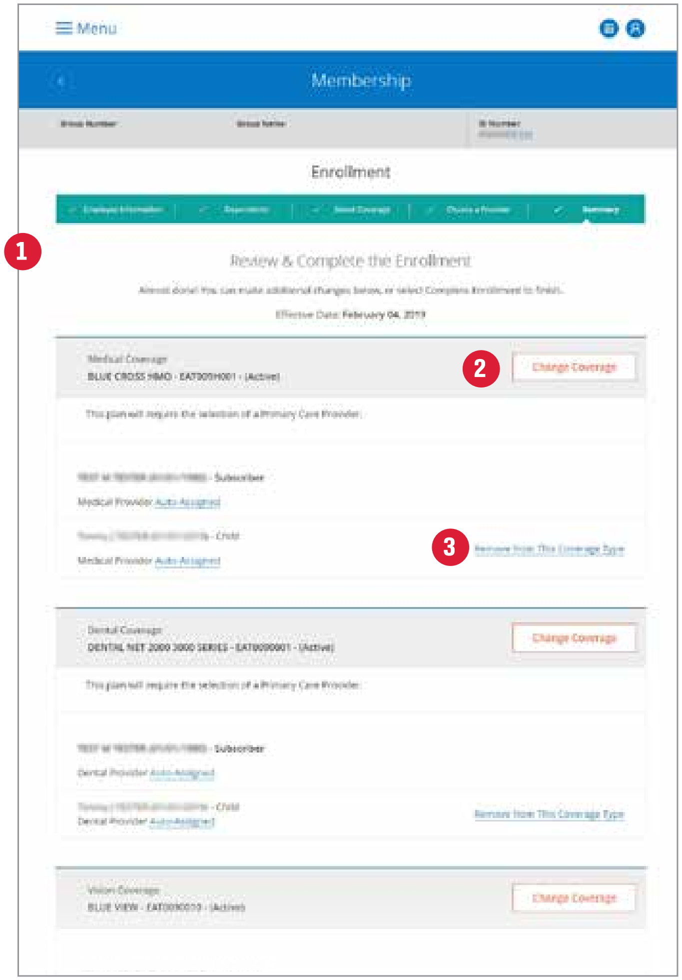
1. Select an option from the drop-down menu labeled *Assign a Provider*.

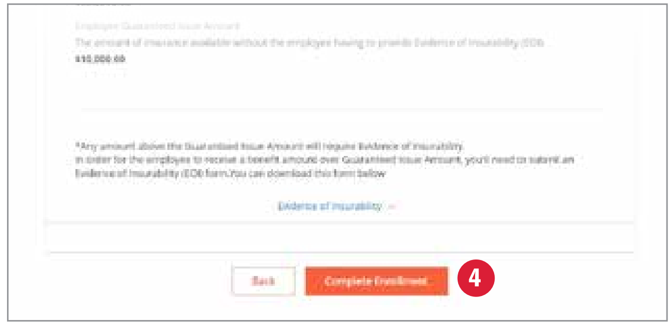
   You will be directed to the *Find a Doctor* website that allows you to search for a primary care provider. When you've selected a provider, enter his or her provider code. Or you can choose **Enter a Provider's Code** if you already know the code for the provider you'd like to enter.

2. You'll have the option to enter a different provider for each dependent, or you can select **Assign this Provider to Everyone.**

   The *Auto-assign a Provider* option is available to some employers and allows the system to pick a primary medical group or independent physicians association as the primary care provider.

New enrollment, *continued*





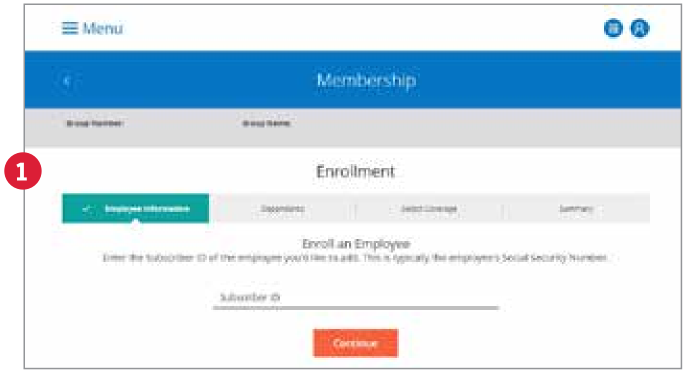
Step 6. Review and complete enrollment

This is the last screen in the new enrollment process.

1. Review benefit selections.
2. Make changes to coverage selected.
3. If you need to remove a dependent from coverage, select here.
4. If everything looks right, select **Complete the Enrollment**.

New enrollment, *continued*

1



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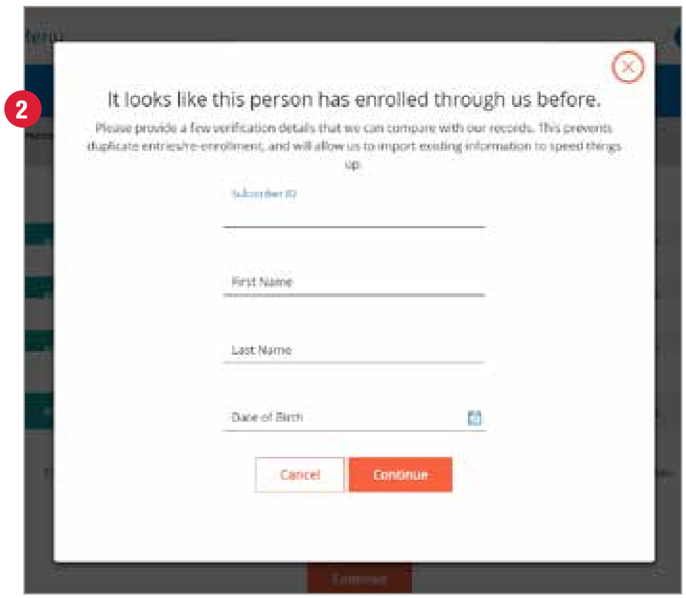

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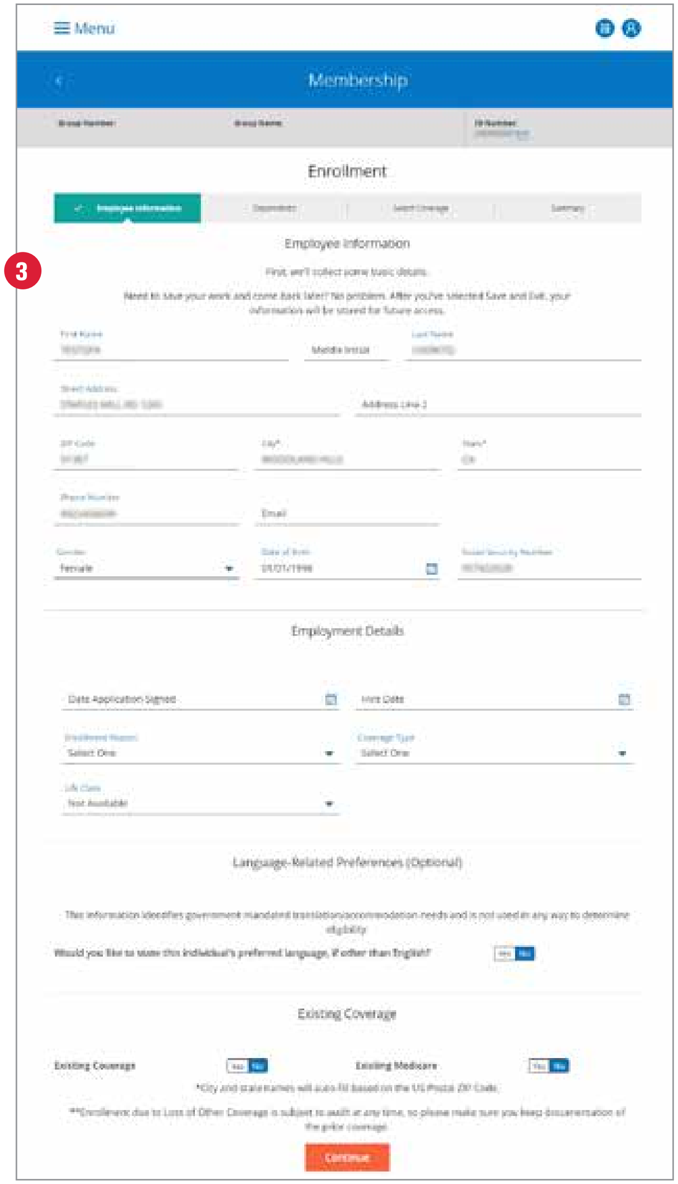


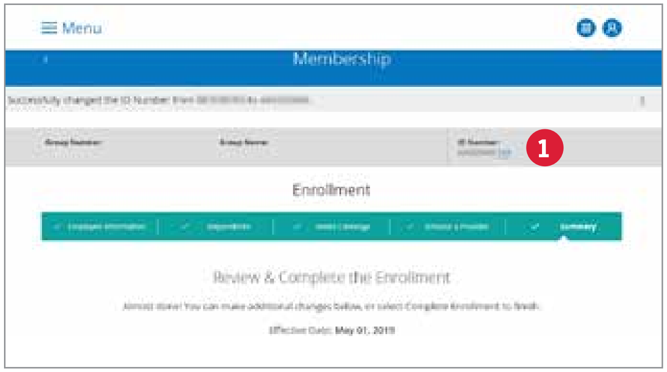
Enrolling subscribers who had Anthem coverage with another employer

You can enroll a subscriber whose coverage has terminated with another employer. When possible, we'll compare the subscriber's information with our records and import existing data to speed things up.

1. Select **Enroll an Employee** and enter the subscriber's Social Security number. Then choose **Continue.**
2. Enter the verification details: subscriber ID, last name, first name and date of birth. Then choose **Continue.**
3. The *Employee Information* fields will be populated with the existing data.

The remaining steps are the same as those on page 9.

New enrollment, *continued*



Correcting an ID (Social Security number)

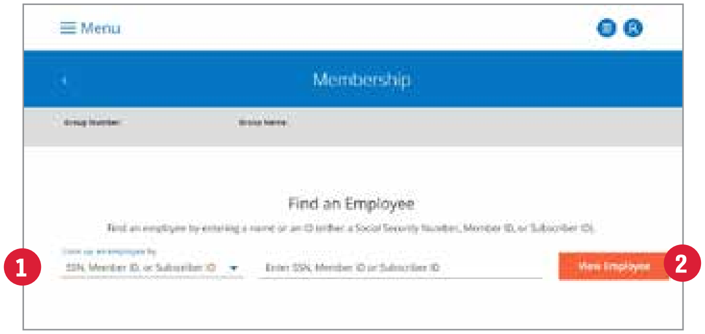
If you notice an error in the ID number on the *Employee Information* page, you can:

1. Select **Edit** next to the ID number, enter the new subscriber ID and save your changes.

You can continue your work on the *Employee Information* page.

Note: You can only access the *Edit ID Number* hyperlink through this screen. You can only change an ID number during the enrollment process. You can't change an ID number after a new enrollment is submitted.

Existing member maintenance

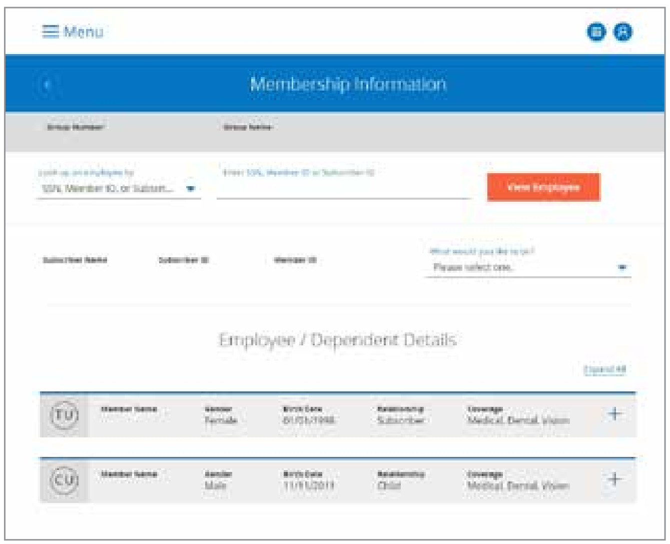


Find and manage an employee

To perform maintenance on a specific employee and/or dependent, first find an employee. There are two ways to do this:

1. Under *Find and manage an employee*, enter the employee's Social Security number, member ID or subscriber ID, or enter the employee's first name and last name.

2. Select **View Employee** and your search will bring up an *Employee/Dependent Details page*. There, you can view specific information about an employee and easily initiate member update transactions by selecting an action item from the drop-down box under *What would you like to do*.



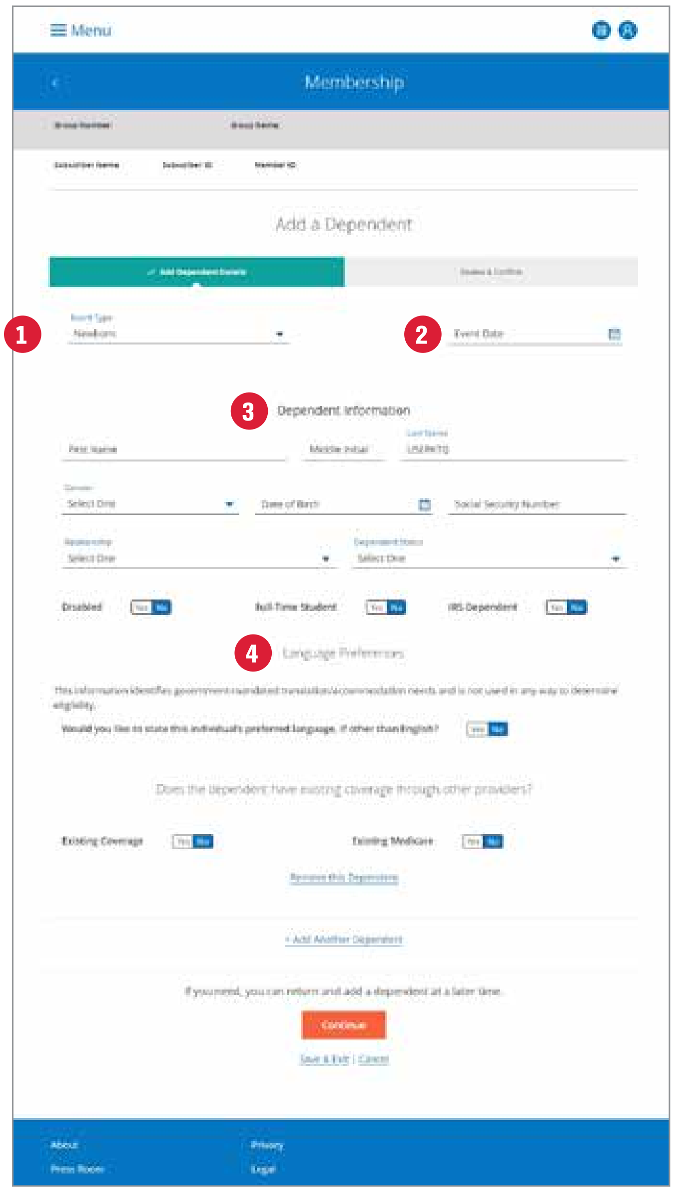
Employee/dependent details

The *Employee/Dependent Details* page displays a list of enrolled members and their benefits. Choose **Expand all** to see the detailed coverage information for each covered member. Or select the **+** sign next to a particular member's name to view information such as:

- Coverage
- Names
- Address
- Birth dates
- Relationship codes for dependents
- Effective/cancellation dates
- Provider information
- Past coverage information

Note: Although you don't need to submit paper applications or change forms to Anthem, please keep copies to provide at a future date, if needed.

Existing member maintenance, *continued*



Add or re-enroll dependents

To access this screen, select **Add Dependent** from the *What would you like to do* drop-down box. You can add or re-enroll dependents to an enrolled employee's (subscriber's) coverage.

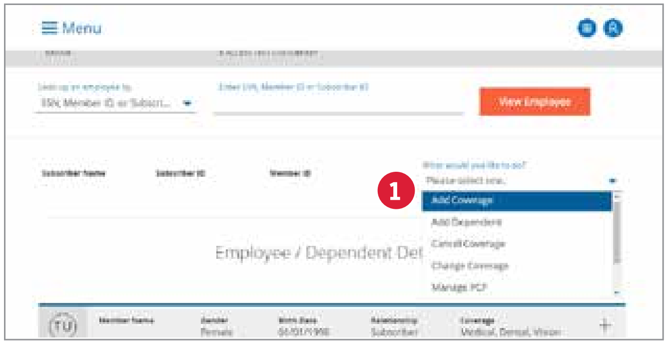
New spouses and newborn dependents may be added through EmployerAccess within 60 days of marriage or birth. A dependent spouse and/or children may only be added during the group's open enrollment period or a qualifying event.

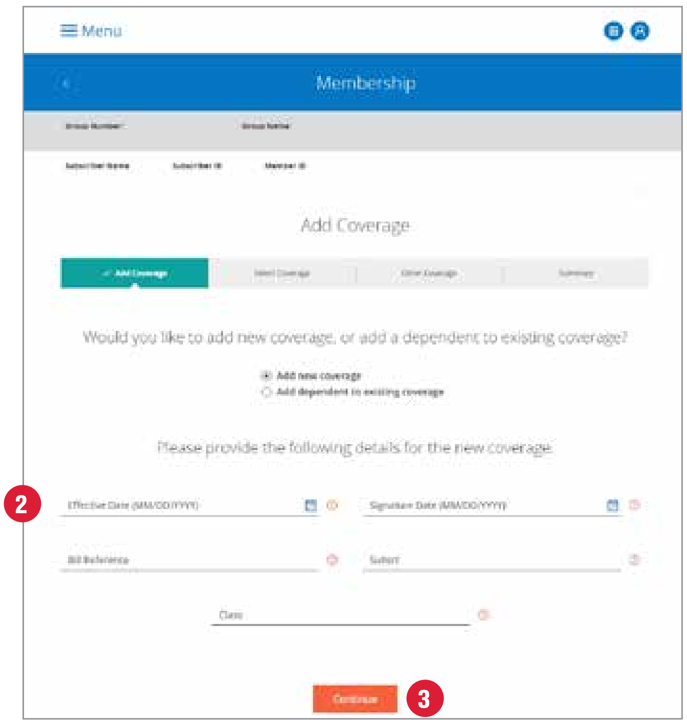
1. Choose the event type.
2. Choose the event date.
3. Enter all dependent information.
4. Select the language preference.

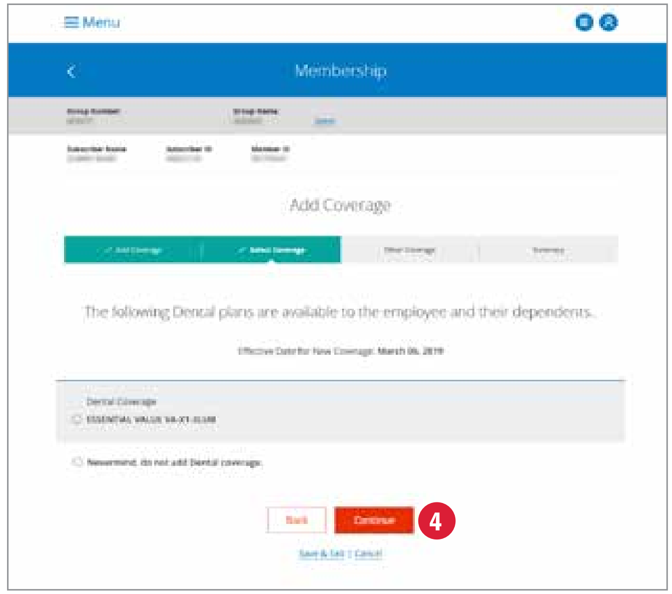
The remaining steps are the same as the *Add Dependent* steps of the *New Enrollment* section on page 9.

Note: You can only re-enroll a dependent on this page if the dependent is not active in any other plan. If the dependent is active in another plan, use the *Add Coverage* option. A separate transaction is required when re-enrolling and adding new dependents.

Existing member maintenance, *continued*







Add coverage

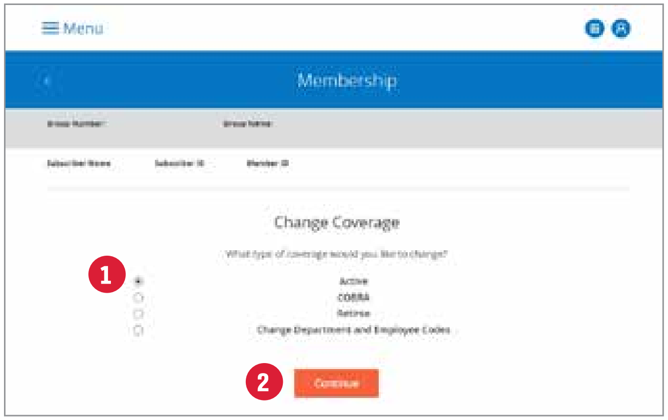
To add coverage to an employee's (subscriber's) benefits, select **Add Coverage** from the drop-down box on the *Employee/Dependent Details* page. Benefits can be added within 60 days of the current date shown in the system.

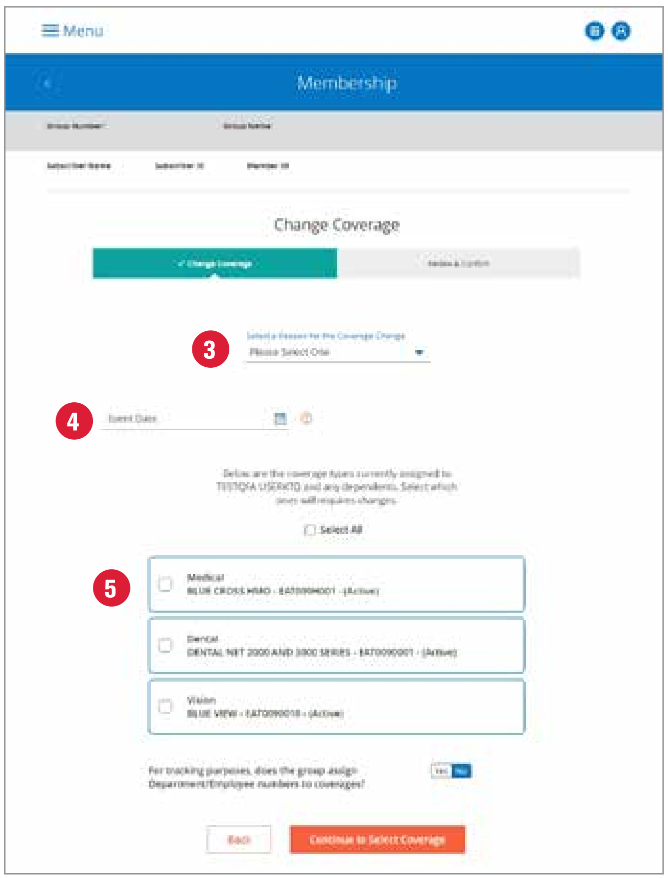
1. Select **Add New Coverage** or **Add Dependent** to existing coverage.
2. Enter the effective date and signature date, then select **Continue**. (The signature date is the date the member signed their enrollment form.)
3. Choose the type of coverage to be added from the drop-down menu and select **Continue**.
4. Choose the specific plan to be added and select **Continue**.

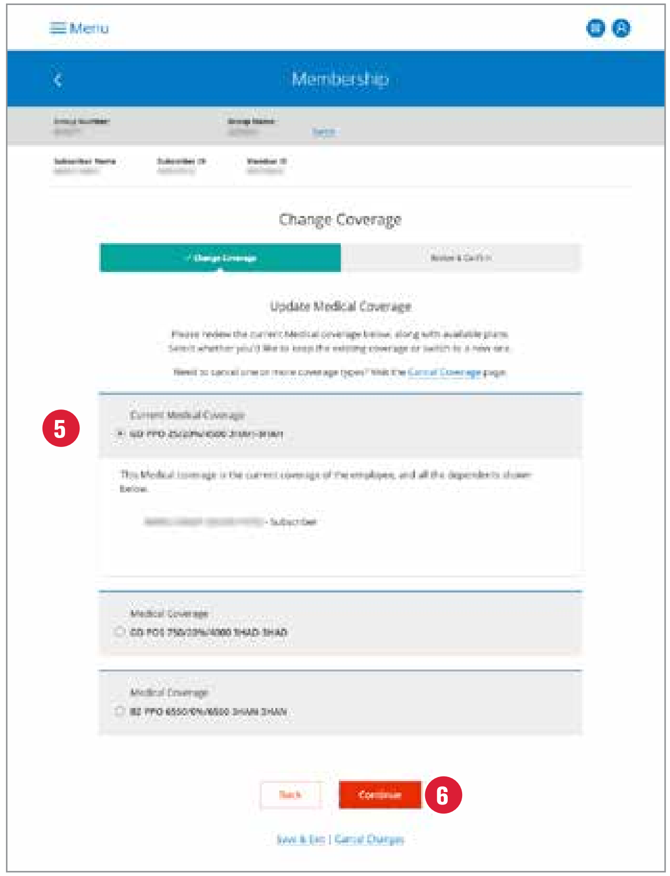
The remaining steps are the same as the *Select Coverage* steps in the *New Enrollment* section on page 10.

Note: Only available coverage will show.

Existing member maintenance, *continued*





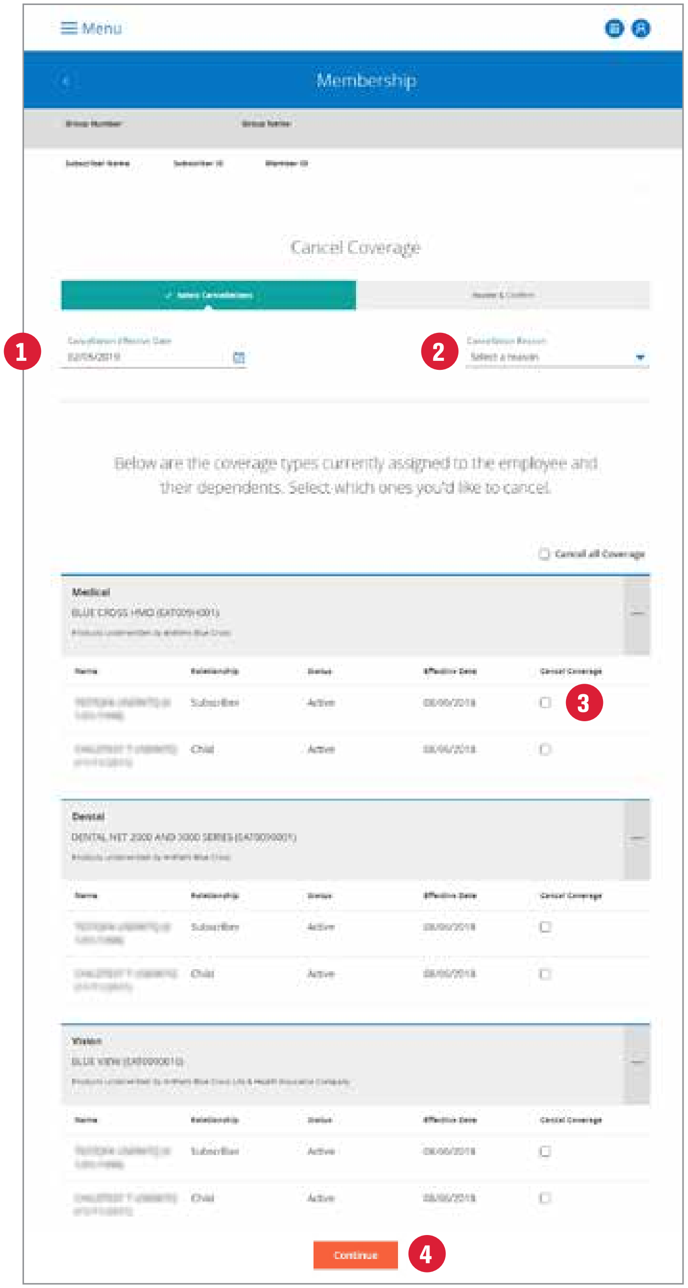


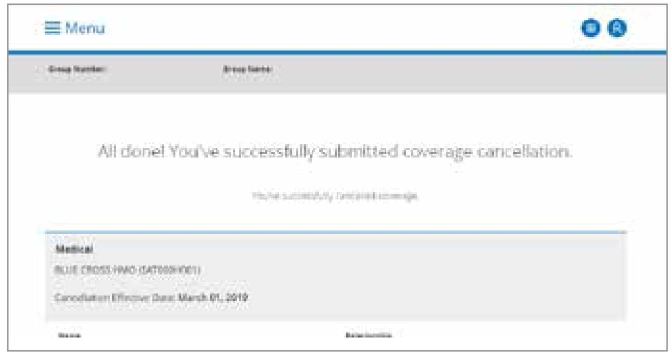
Change coverage

To make changes to existing benefits coverage, select **Change Coverage** under *What would you like to do*. This process is the same as the new enrollment process.

1. Choose **Type of Change**.
2. Select **Continue**.
3. Select reason for coverage change.
4. Enter event date.
5. Select new coverage. Change provider if necessary.
6. Select **Continue**.

Existing member maintenance, *continued*





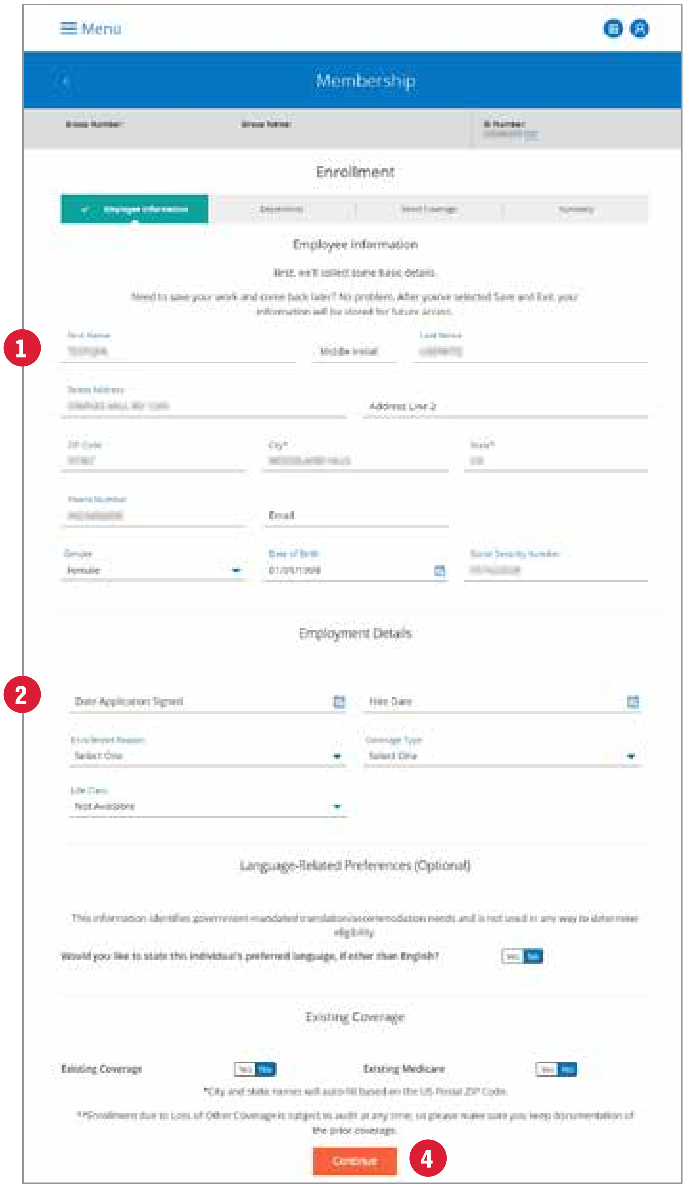
Cancel coverage

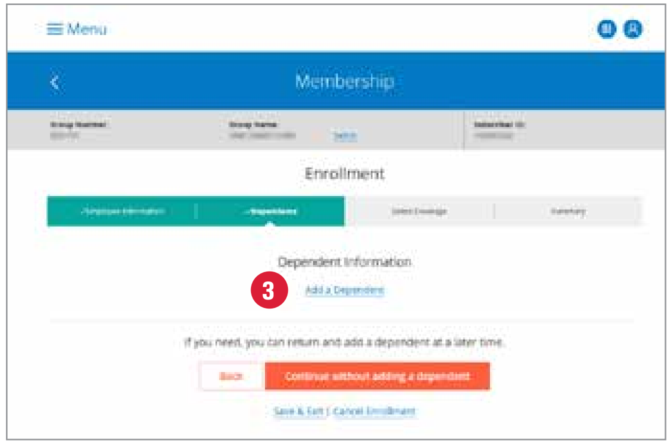
To cancel the subscriber and/or dependent coverage, select **Cancel Coverage** from the drop-down box under *What would you like to do*.

1. Enter the cancellation effective date.
   - WGS/NASCO: Enter the cancellation date based on your group's termination policy. If the employee should be covered through the billing period, enter the first of the month following their termination date. If the employee should be terminated immediately, enter the day after their termination date.
   - FACETS/ISG: Enter the date of termination and the cancellation effective date will be calculated. Be sure to validate that the correct cancellation date is displayed.
2. Choose a **Cancellation Reason** from the drop-down menu.
3. Be sure to check the box to select the member to cancel.
4. Select **Continue** to finish.

Note: If you're canceling a subscriber's life coverage, you may be prompted to download a life conversion form.

Existing member maintenance, *continued*





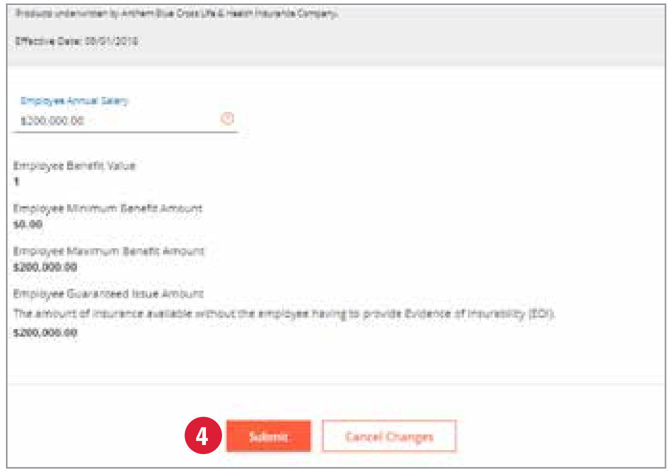
Re-enrollment

To re-enroll a member whose coverage has been canceled or lapsed, choose **Re-Enroll** from the *What would you like to do* drop-down box.

1. To re-enroll an employee (subscriber), update any necessary demographic information.
2. Enter employment details.
3. If the employee has dependents to re-enroll, select the **Add a Dependent** link.
4. If no dependents need to be enrolled, select **Continue**.

The remaining steps are the same as those on page 10.

Existing member maintenance, *continued*



Change life benefit values (only applies to Large Group)

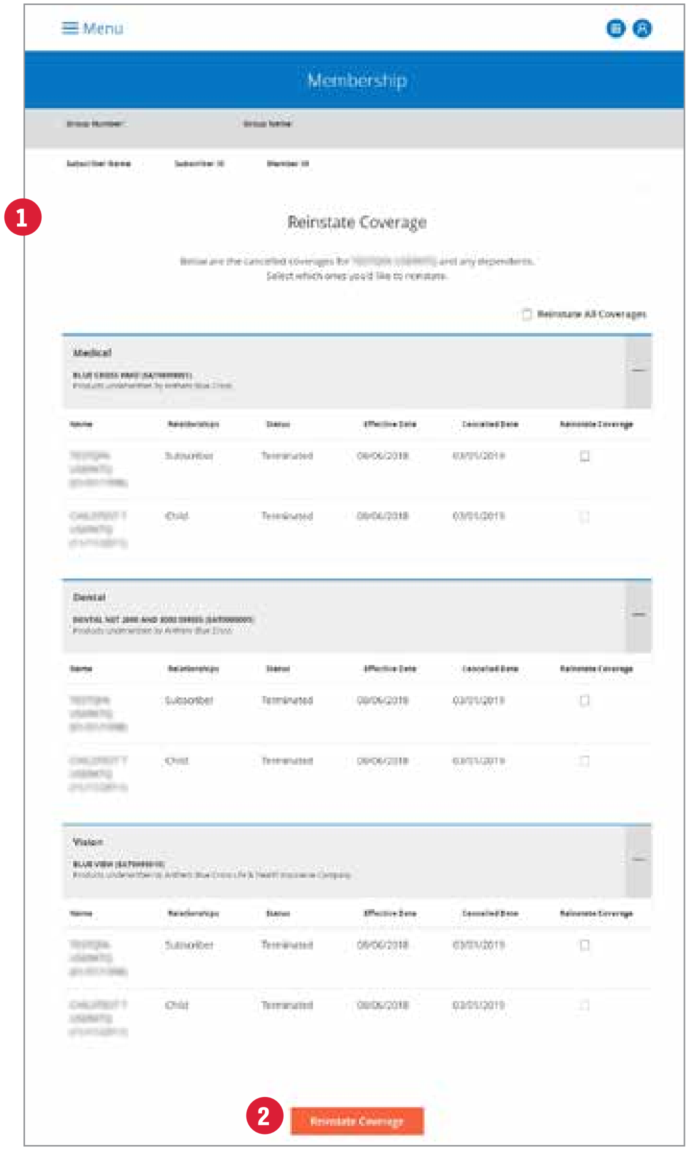
To update life benefits if a member has elected life coverage, select **Change Life Benefits Values** from the *What would you like to do* drop-down box.

1. Select a reason for the change.
2. Enter the change effective date and the signature date.
3. Enter the subscriber's new annual salary.
4. Select **Submit.**

For salary-rated products, it is important to update an employee's salary as it changes to ensure their benefits are calculated correctly.

Note: Updates can also be made to the benefit value for other products that are not salary based. You will need to select from the **Member Life** or the **Employee Selected Benefit Value** options that are available from the *Reason for the Change* drop-down box.

Existing member maintenance, *continued*



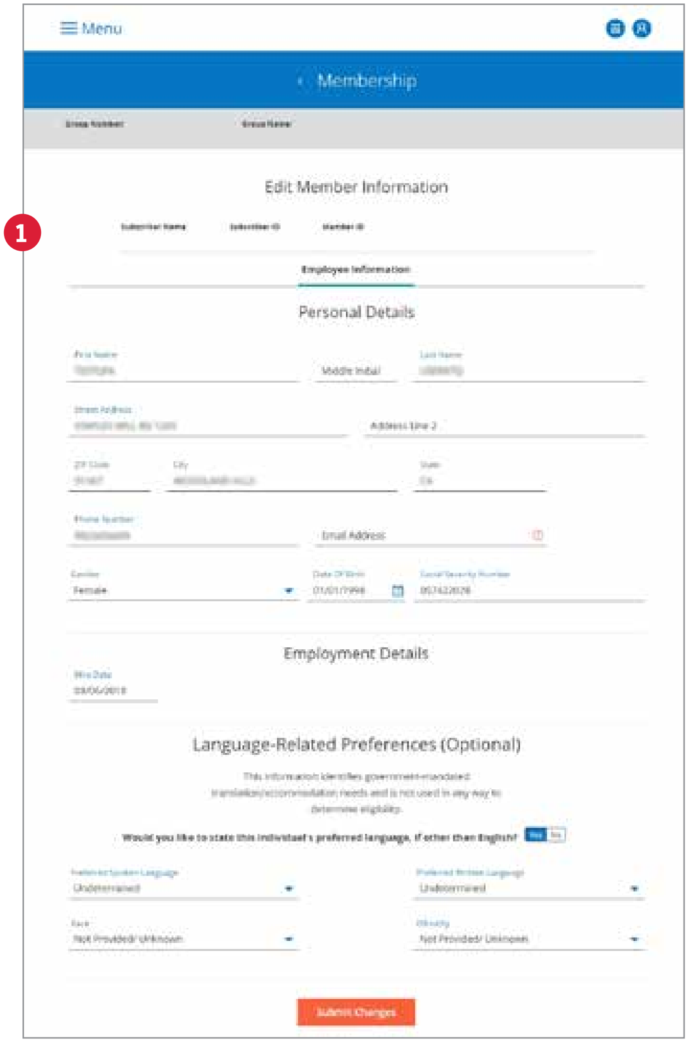
Reinstate

To reinstate a member with no lapse in coverage, choose **Reinstate** from the *What would you like to do* drop-down box.

1. To reinstate an employee and dependents, check the box marked **Reinstate Coverage**. Be sure to check all applicable reinstated members.
2. Verify the changes before you submit the new information, then select **Reinstate Coverage**.

Note: No dependents can be reinstated on canceled contracts unless the employee (subscriber) is reinstated. Benefits may be reinstated within 60 days of the cancellation date.

Existing member maintenance, *continued*

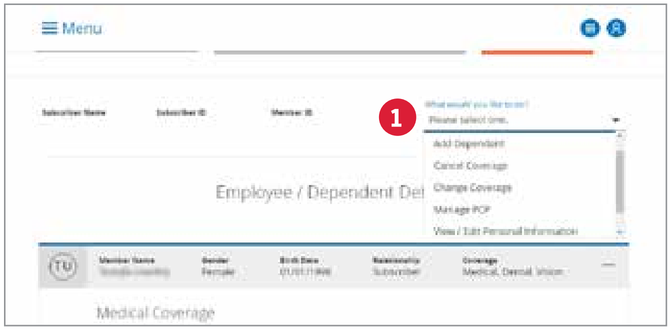


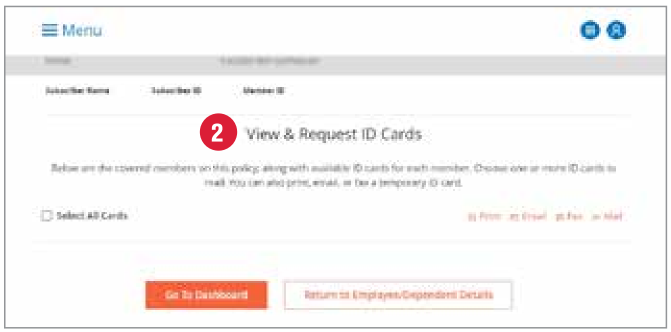
View/edit member information

1. Select **View/Edit Member Information** from the *What would you like to do* drop-down box to access the option to change employee (subscriber) and dependent personal information, such as address, phone number, etc.

Note: You'll need to verify your changes on this screen before you choose **Continue**.

Existing member maintenance, *continued*





View/print ID cards

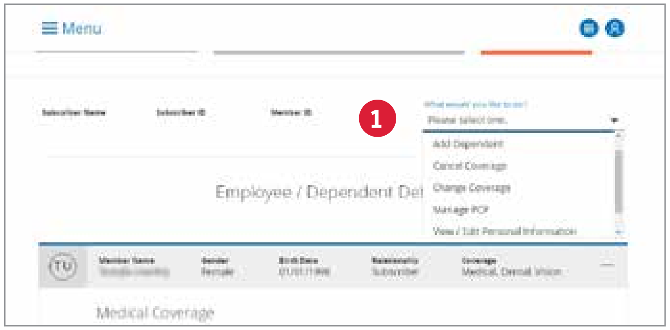
The *View/print ID cards* function is only available for members with active coverage. For any new enrollments or updates, you may need to wait up to two business days for the PDF to be available.

You'll have the option to view, print, email, fax or mail a copy of the ID card. This function is on the *What would you like to do* drop-down box.

1. Choose **View/Print ID Cards**. Use the drop-down menu to select a member.
2. Choose **View & Request ID Cards**. To see the temporary ID card, you'll need to turn off your computer's pop-up blocker because the ID card will open in a new window.

Note: If products are set up with a combined ID card for all products, you only need to select one product.

Employer-level capabilities

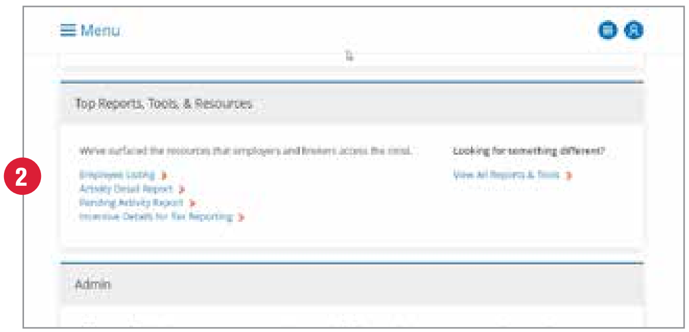


View claims

Groups with a funding arrangement for administrative services only and access to claims will be able to see the claims details for their employees and their dependents.

To do so, select **View Claims** from the drop-down box under *What would you like to do*.

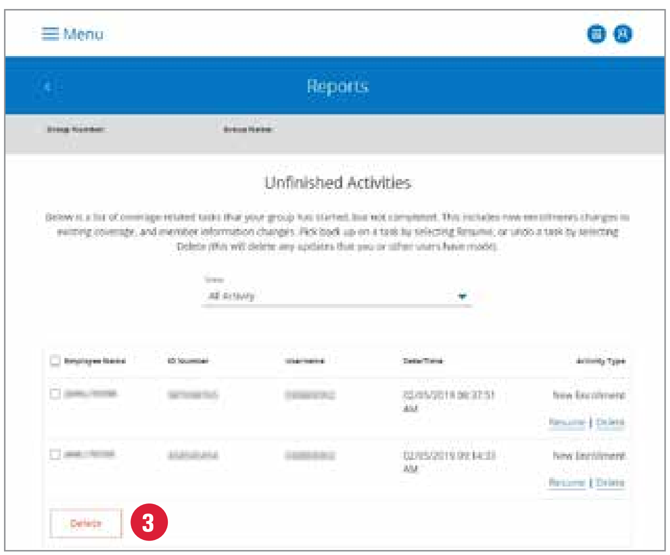
1. You can filter the results by selecting **View Results** and choosing one of the options from the drop-down: **Date Range**, **Member** or **Status**. Or you can enter the claim ID and select the search icon if you want to review a specific claim. To view additional claims details, select the **Claim ID** link.



Reports

2. Use this tab to generate reports, view the subscriber/dependent listing, see an employee roster and more.

Note: Other commonly used reports are available under **Looking for something different** and **View All Reports and Tools.**



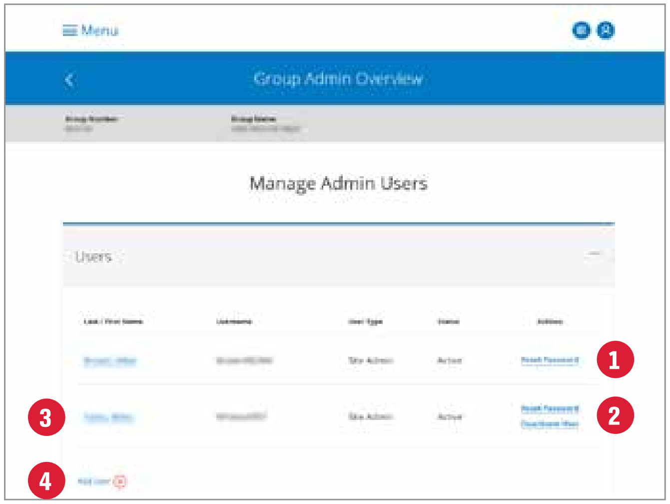
Unfinished activities

This example shows how your *Unfinished Activities* folder might look.

3. Selecting **Delete** on a transaction on this page lets you cancel the transaction that was in process and was saved. It does not cancel any existing coverage for the subscriber/dependent.

Note: To ensure full access to subscriber information and accurate records, you need to be aware of unfinished work and process or delete pending transactions. You're required to pay all invoices in a timely manner, according to the terms of your group contract.

Employer-level capabilities, *continued*



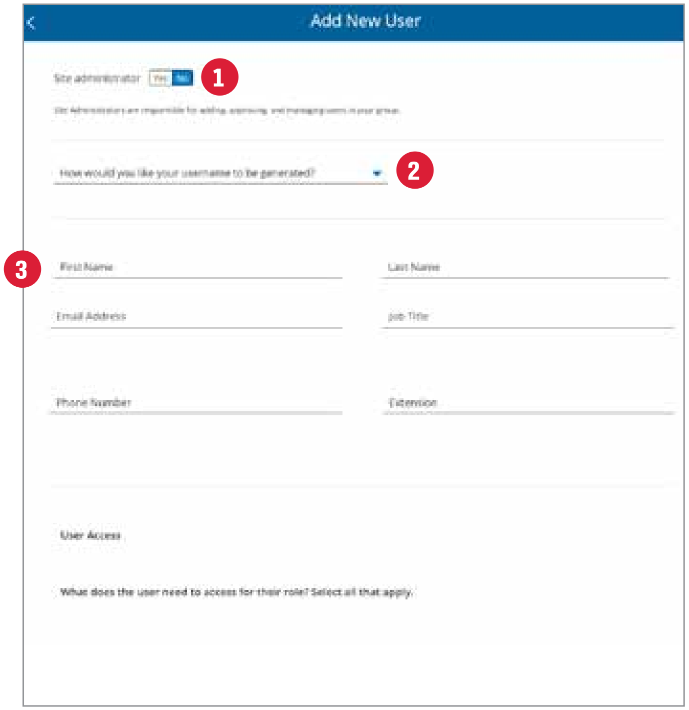
Manage admin users

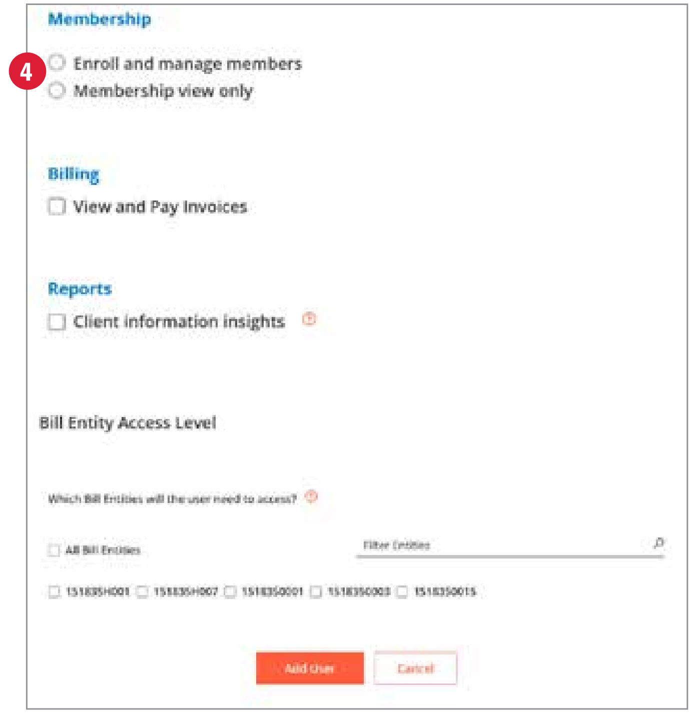
As the Site Administrator for your group, you can use this section to access and manage the users for your group. Select **Manage Admin Users**.

From this screen, you will have the ability to:

1. Reset Password
2. Deactivate User
3. Edit User
4. Add User

Employer-level capabilities, *continued*





Add admin user

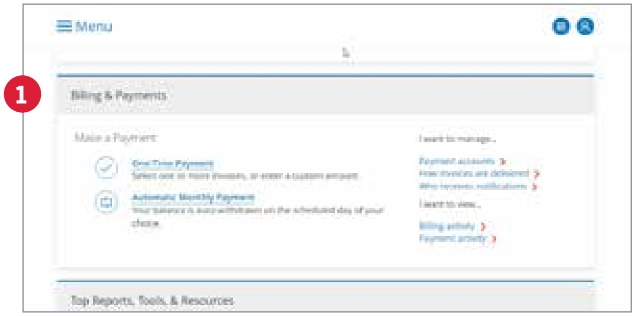
Once you have selected **Add User**, complete the user details.

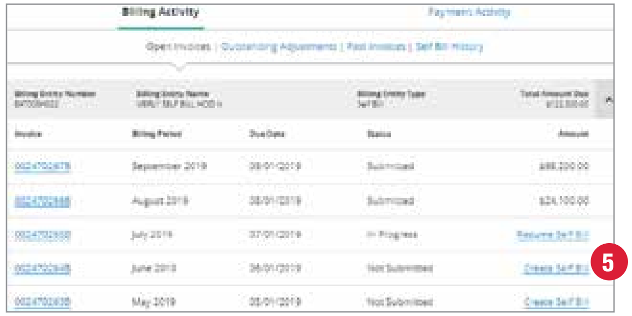
1. Site administrator — **Yes** or **No.**
2. Determine how you would like the user name generated.
3. Provide the first and last name, email address, job title and phone number.
4. Set the access levels - enroll and manage or membership view only.

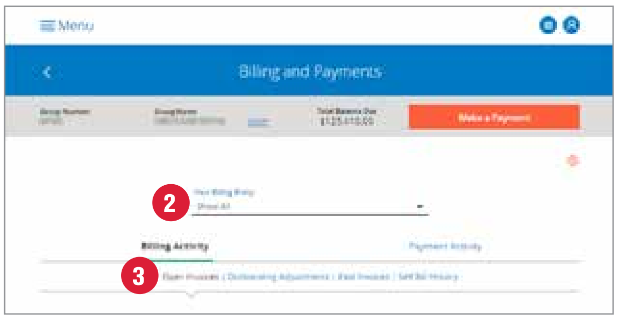
Note: Setting a user with access to enroll and manage will allow the user to enroll new subscribers and perform member maintenance transactions along with view eligibility and all other inquiry transactions. Membership view only will allow the user to view eligibility and perform inquiry-only functions.

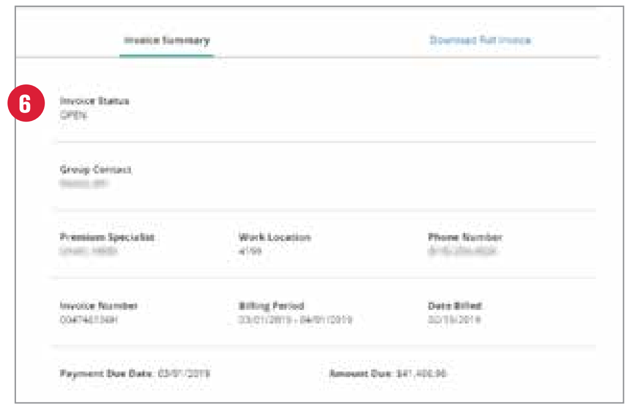
- View and pay invoices (fully insured groups only)
- View claim status (ASO groups only)
- Access to Client Information Insights (not available to all groups)
- Access to Data View Direct (not available to all groups)
- A user's access can also be restricted based on your group's structure. For example: billing entity, subgroup or section code.

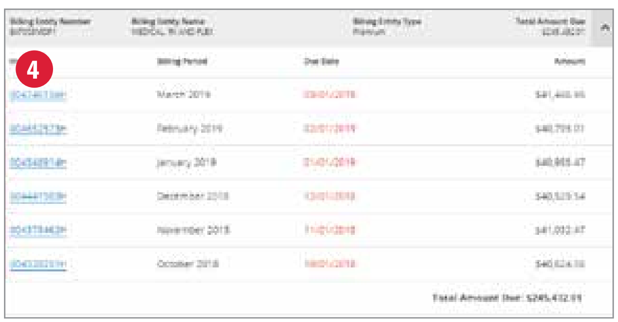
Billing and payments











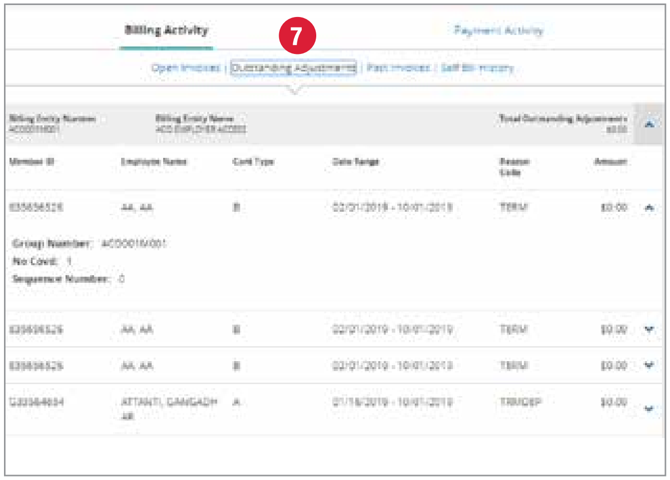
The *Billing & Payments* section is available to groups with a fully insured funding arrangement and for users that have requested billing access.

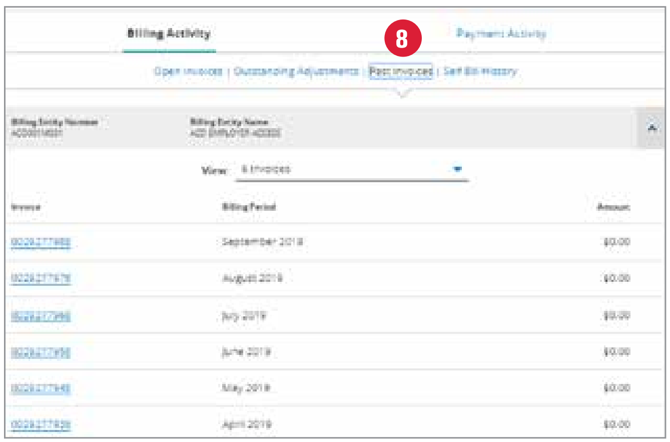
Billing activity

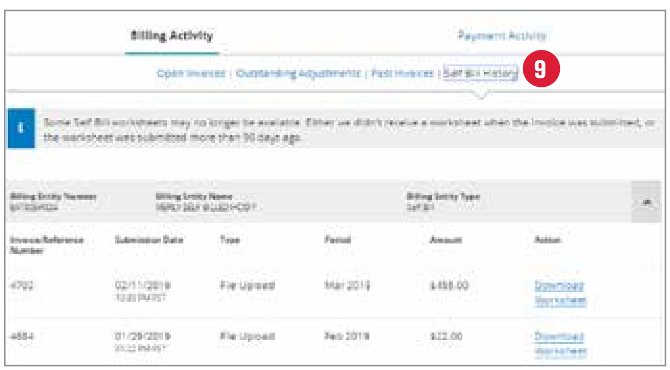
1. To start, under *I want to manage...* choose **Billing activity** from the *Billing & Payments* section.
2. Select which billing entity you would like to view from the *View Billing Entity* drop-down box at the top of the page.
3. Choose between **Open Invoices**, **Past Invoices**, **Outstanding Adjustments** and **Self Bill History**.
4. When you select **Open Invoices**, the invoice number, billing period, due date and amount due will be displayed.
5. If you are a self-billed group, you can upload a worksheet by selecting an **Open Invoice** and then choosing **Create Self Bill** or **Self Bill Worksheet**.
6. To see an open invoice, select the **Invoice** link and you will be presented with the invoice summary, where you can see: invoice status, group contact information, premium specialist and phone number, invoice numbers, billing period, date billed, payment due date and amount due.

   You can view the invoice summary for a different invoice by using the *Billing Period/ Invoice* drop-down.

Billing and payments, *continued*





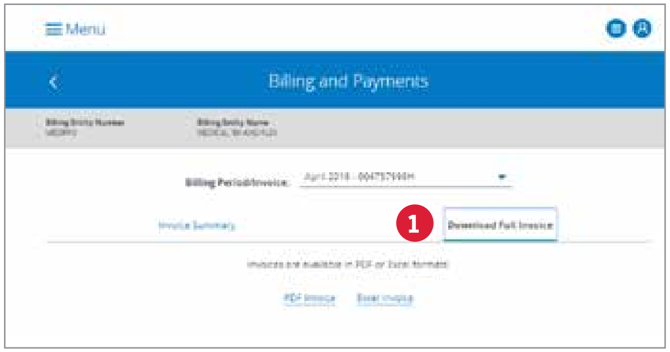


7. To see any billed adjustments that may have occurred prior to your bill cycle, select **Outstanding Adjustments**.

8. Choose **6 Invoices**, **12 Invoices** or **All Invoices** to **View Past Invoices** from the drop-down selection. Then, select the invoice link and you will be presented with the invoice summary, where you can see: invoice status, group contact information, premium specialist and phone number, invoice numbers, billing period, date billed, payment due date and amount due.

9. You can access your **Self Bill History** to see an invoice number, submission date, type, period and amount. You will also have the ability to view or download a file.

Billing and payments, *continued*

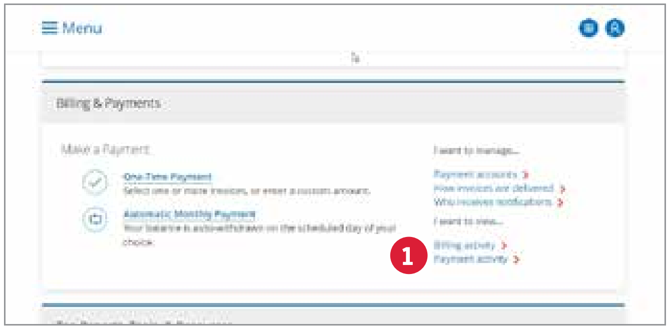


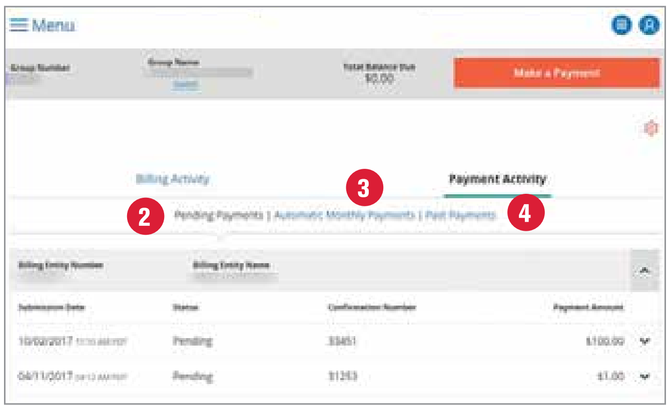
Invoice details

Invoice details can be downloaded and saved as a PDF or in Microsoft Excel (Excel) format.

1. Select **Download Full Invoice** to view invoice details. Choose the version you would like to receive: PDF or Excel. You'll get an email when your requested invoice is available for download. The PDF version will be an exact copy of the paper version of your invoice. The Excel version will give you the ability to sort the data in the invoice, such as by department number, subscriber ID or name.

Billing and payments, *continued*





Payment activity

1. Under *I want to view…* choose **Payment activity** from the *Billing & Payments* section.

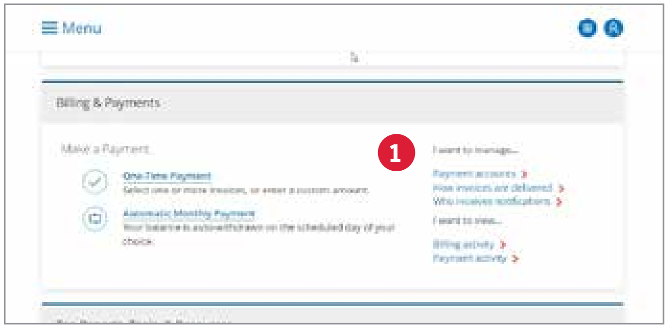
   Choose between **Pending Payments**, **Automatic Monthly Payments** or **Past Payments**.

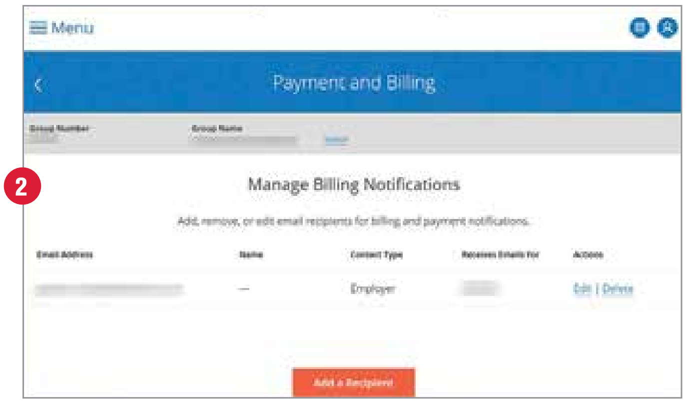
2. Select **Pending Payments** to review the details of your recent payments. The details displayed will include submission date, status, confirmation number and payment amount.

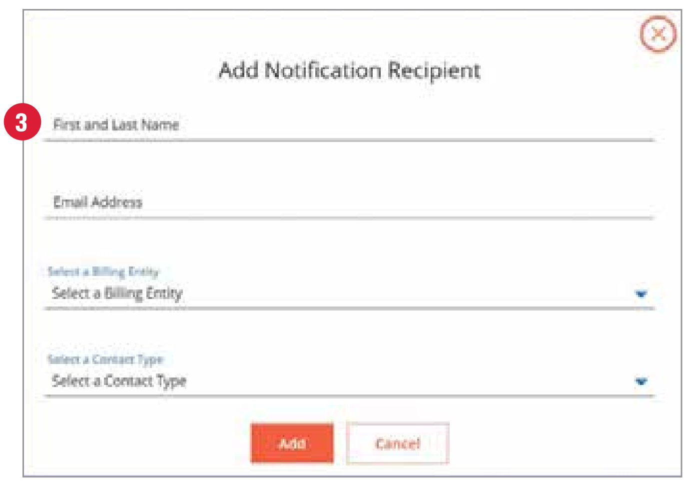
3. *Automatic Monthly Payments* will display the details for your scheduled payments. Automatic monthly payments can be edited or deleted.

4. Select **Past Payments** to see a summary of all payments received.

Billing and payments, *continued*







Manage who receives billing notifications

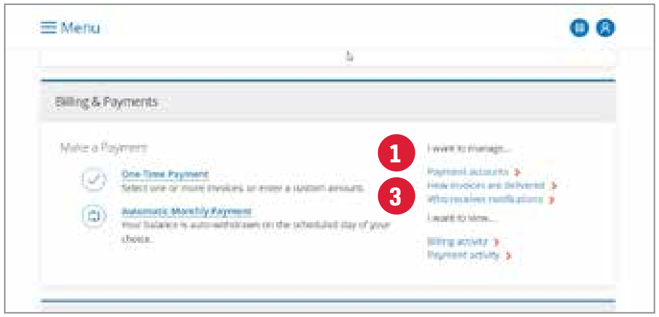
EmployerAccess allows you to add, remove or edit email recipients for billing and payment notifications.

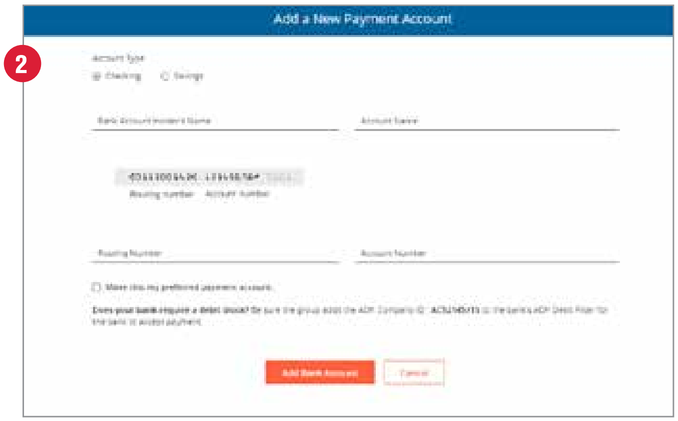
1. Under *I want to manage...* choose **Who receives notification** from the *Billing & Payments* section.
2. Edit or delete existing email addresses, and select **Update** when finished.
3. Add a recipient and complete the appropriate fields.
   - Enter the first name and last name.
   - Provide the complete email address.
   - Select a billing entity.
   - Choose a contact type.
   - Select **Add** to finish.

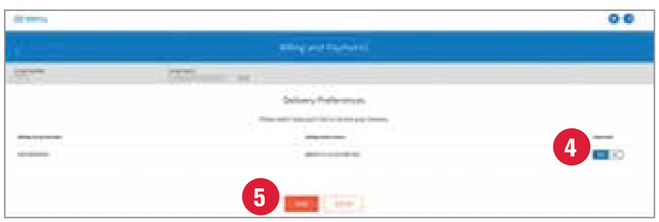
Note: Any administrator with an email address in EmployerAccess, regardless of access, may get a notification that the bill is ready, as well as other emails.

The online bill pay option allows you to set up one or more bank accounts from which you can assign bill payment. Start by finding the email contact information for the authorized users assigned to get notifications, alerts and transaction confirmations related to online group billing activity.

Billing and payments, *continued*







Manage bank accounts

EmployerAccess is a safe and secure site. Enter valid bank account information to complete the online bill pay set-up process and start making payments online.

1. Under *I want to manage...* choose **Payment accounts** from the *Billing & Payments* section.
2. Enter the financial information for the bank account, including:
   - Account type
   - Bank account holder's name
   - Routing number
   - Account number

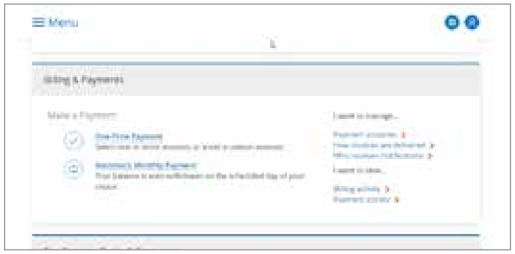
Choose **Add Bank Account** to finish.

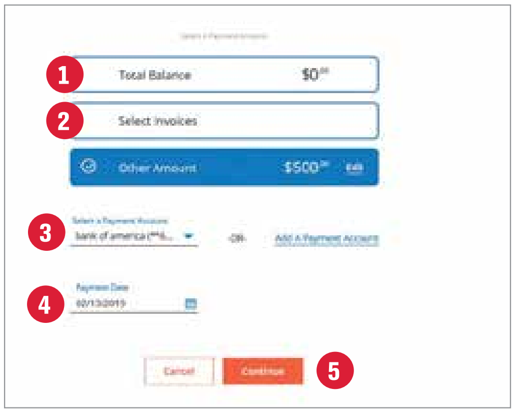
You may add multiple bank accounts as needed. Just go back to the *Manage Bank Account(s)* screen and choose **Add New Account**.

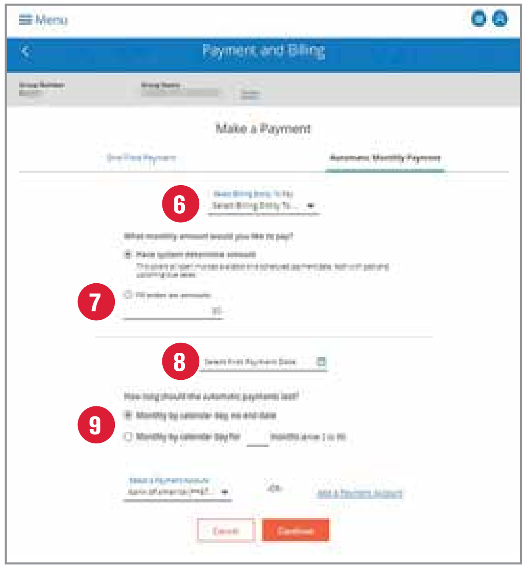
Manage invoice delivery

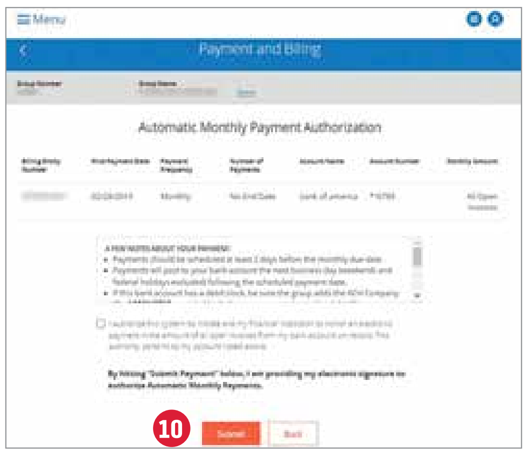
3. Under *I want to manage...* choose **How invoices are delivered** from the *Billing & Payments* section.
4. Select how you'd like to receive your invoices for each of your billing entity numbers. Paperless: Choose **Yes** or **No**.
5. Select **Save** to finish.

Billing and payments, *continued*









EmployerAccess offers the convenience and flexibility of paying your monthly bills online. From the *Billing & Payments* section, you can make a one-time payment or schedule an automatic monthly payment.

One-time payment

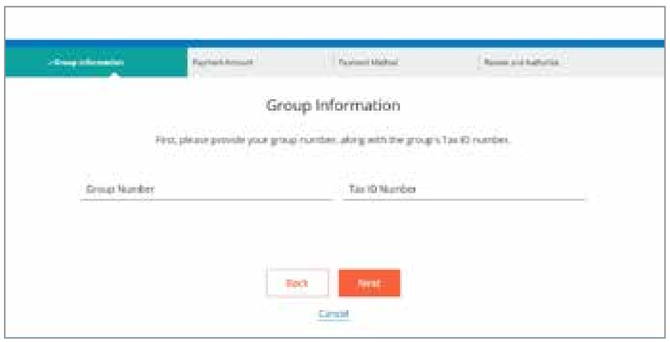
1. Review your total balance.
2. Select invoices to pay or enter other payment amount.
3. Select a payment account or add a payment account (see page 28 to add).
4. Enter your payment date.
5. Choose **Save**. You'll get an email saying payment has been received.

Automatic monthly payment

6. Select the billing entity to pay.
7. Set the monthly billing amount you'd like to pay.
8. Select first payment date.
9. Determine how long the automatic payments should last.
10. Select **Submit**.

You have the option to pay online from almost any screen in the *Billing & Payments* section. Look for the **Make a Payment** button.

Billing and payments, *continued*



Employer EasyPay

The Employer EasyPay interface at **easypay.anthem.com** allows unregistered EmployerAccess customers to make online payments as a guest user. This simple and responsive user interface leverages the online group billing payment process on EmployerAccess.

To make a payment as a guest user, you must provide your case or group number and your tax ID. Once verified, the application will prompt you through the rest of the steps.