Employer Portal Reference Guide

This reference guide illustrates how to register for and use the employer portal.

Table of Contents

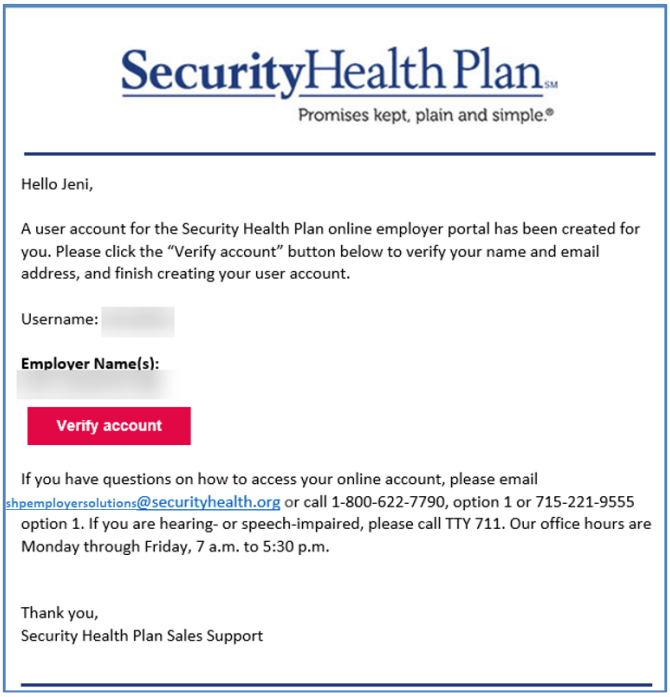
New user registration 2
Logging in – Active user 2
Select your account 3
Navigating the Employer Portal 4
Plan Administration 5
Plan Details 5
Billing 5
Claim funding (Insite only) 10
Payment register (Insite only) 11
Member management 14
Stop Loss - (Insite only) 16
Spec and Agg Reporting 16
Trigger Diagnosis (Dx) 18
Reporting 19
View reports 19
Member claims lookup 20
My Account 24
Portal user management – For Admin users only 24
Portal user settings 25
Notifications 26
Notification Preferences 27
About 27
Help 27

New user registration

To register for ***the employer portal*** click the following link and complete the Employer Group Access Request form:

Or go to www.securityhealth.org and follow these steps:

1. Select **Employers** in the blue menu bar at the top of the page.
2. Scroll down to the bottom of the page and select **Employer Access Form**.
3. Complete and return the form to shpemployersolutions@securityhealth.org.
4. You will receive an email with your username.
5. Click Verify Account.


SecurityHealth Plan℠
Promises kept, plain and simple.®

Hello Jeni,

A user account for the Security Health Plan online employer portal has been created for you. Please click the "Verify account" button below to verify your name and email address, and finish creating your user account.

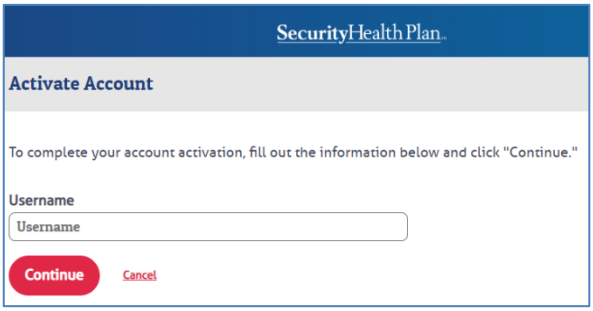
Username:

Employer Name(s):

Verify account

If you have questions on how to access your online account, please email shpemployersolutions@securityhealth.org or call 1-800-622-7790, option 1 or 715-221-9555 option 1. If you are hearing- or speech-impaired, please call TTY 711. Our office hours are Monday through Friday, 7 a.m. to 5:30 p.m.

Thank you,
Security Health Plan Sales Support

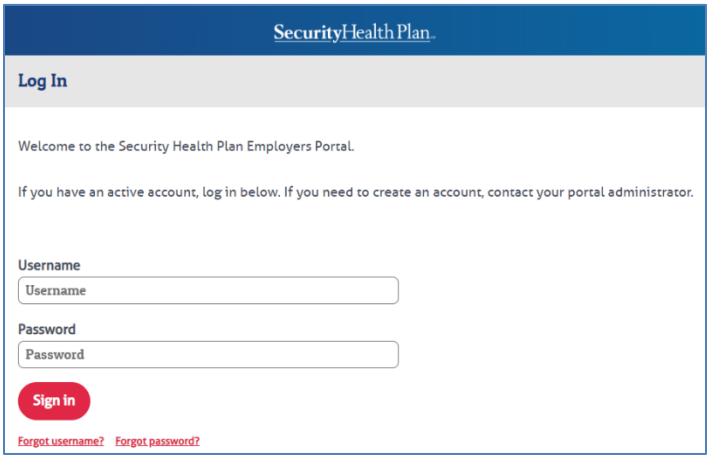


6. Enter username and click **Continue**.
7. Enter the email address linked to your account and click **Send code**.
8. You will receive an email with a verification code that is time sensitive.
9. Enter verification code and click **Verify code**.
10. Enter username and create your password.
11. Agree to Terms of use by checking ☑ I Accept and click **Submit**.
12. Once you have created your password and accepted the terms, then you are set-up and an active user on the employer portal.

Logging in – Active user

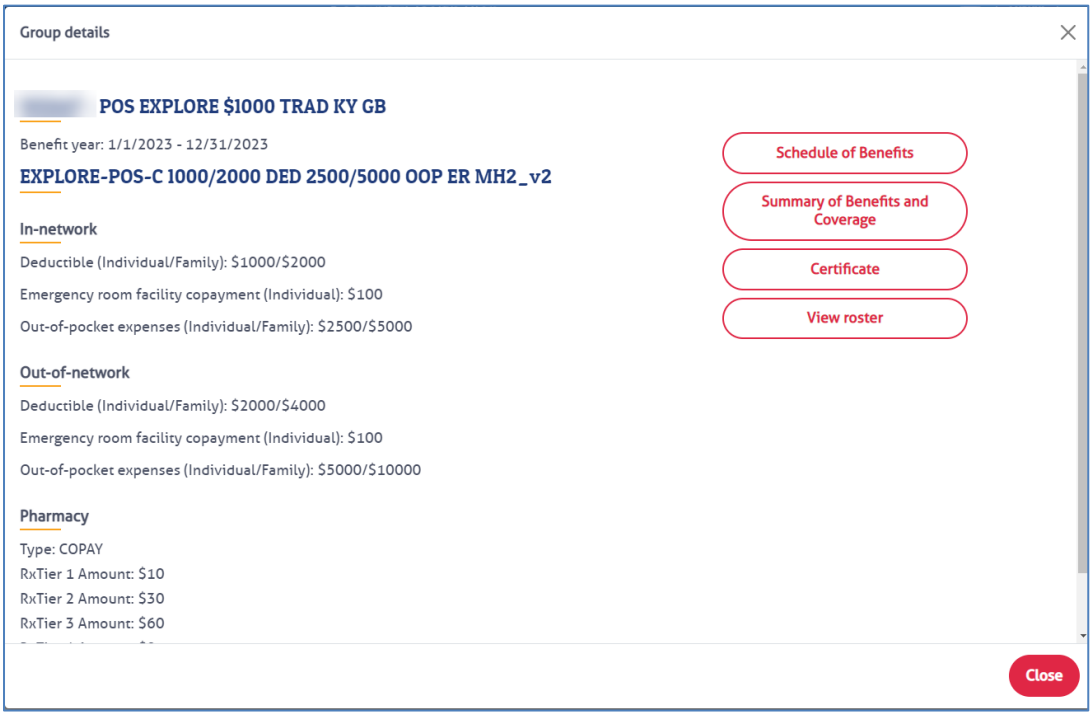
Once registered, you can log into the employer portal as an active user.

1. Go to www.securityhealth.org
2. Click **Employers**.
3. Click **Login**.
4. Enter username and password:
5. Click **Sign in**.



Select your account

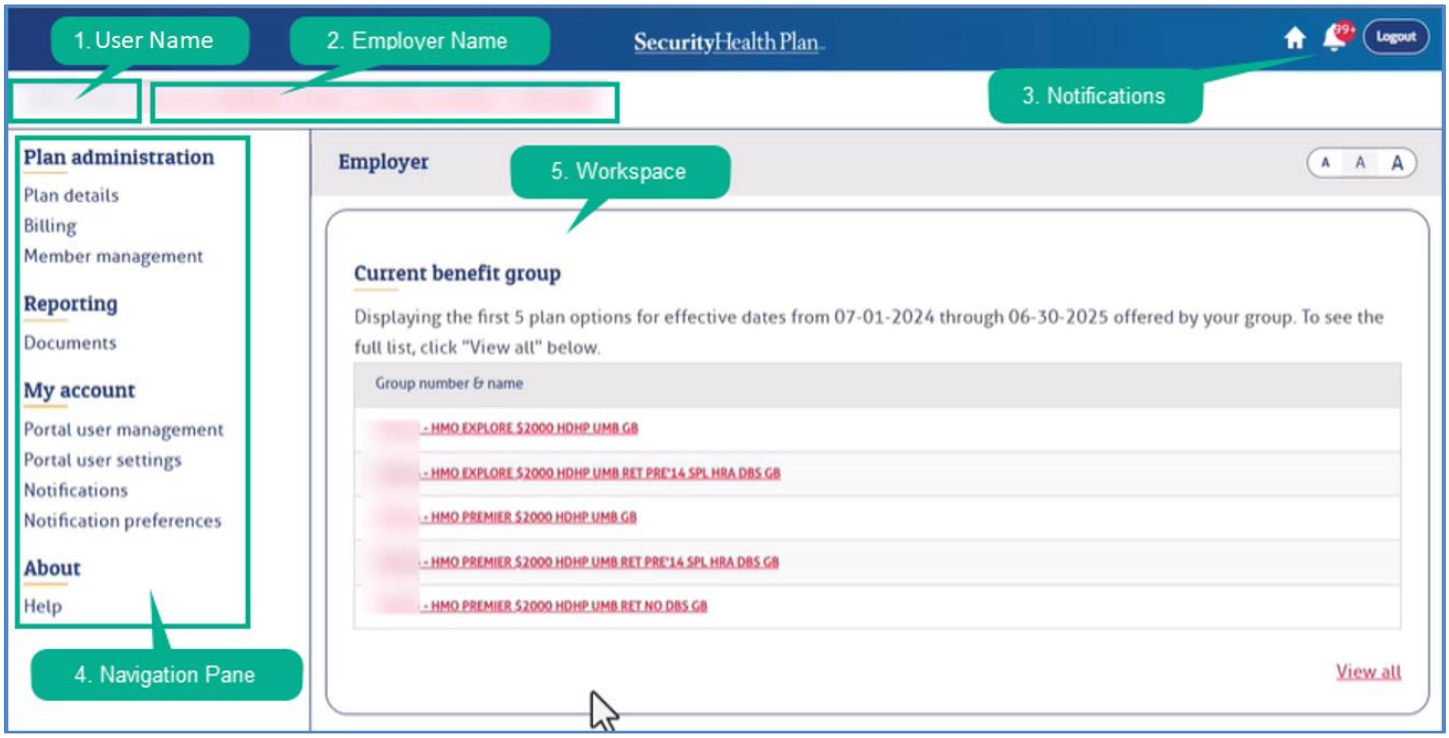
1. Click Select next to the Employer Group ID and Employer Name if you have multiple locations.
2. Under Current group tab, select the applicable Group number and name you wish to view.
    a. Group details will display current coverage details and links to the following:
        - Schedule of Benefits
        - Summary of Benefits and Coverage
        - Certificate
        - Certificate Amendment
        - View Roster – (this roster is for the subscribers on this benefit only)



3. Click Close

Navigating the Employer Portal

Below is an overview of the home page.

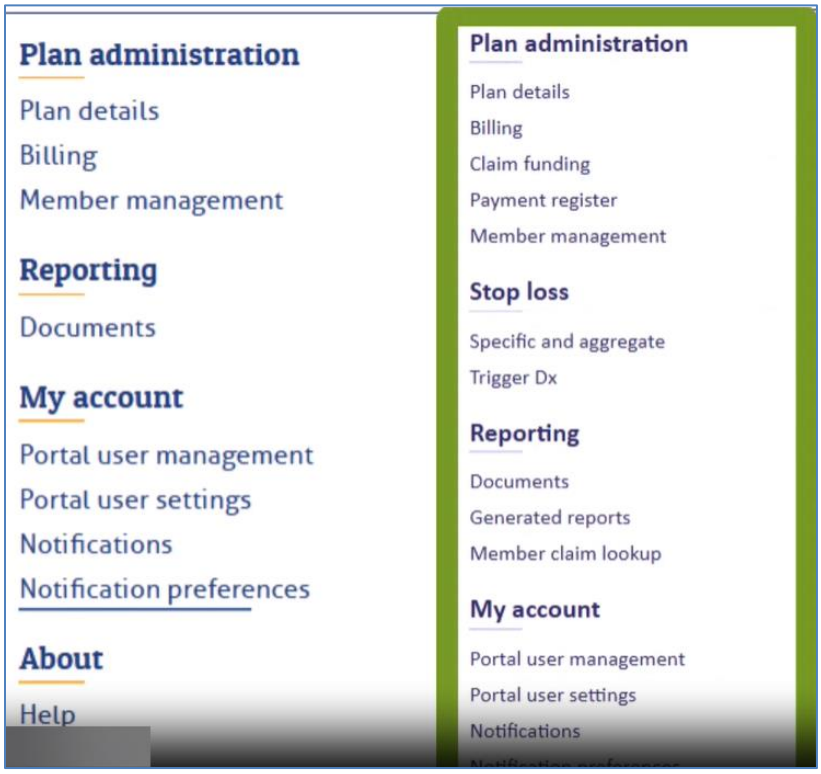


Note: *For third-party administrative employers, the Security Health Plan logo will change to display Insite by Security Health Plan and the color scheme will change.*



1. Your name (based off your login).
2. The employer's name you are currently viewing.
   Note: To change employers, click the red employer name at the top and choose a different employer. Employers are displayed based off broker, not agency.
3. The notification bell shows the number of new notifications for all employer groups you access.
4. The navigation pane section provides navigation options based off a user's access, which means options may vary for different users in different roles.
5. The right side is the workspace for viewing the pages on the left side and allows you to view eligibility and account information, billing amounts, and various reports.

Depending on the type of coverage the employee has, there may be additional sections on the navigation pane.



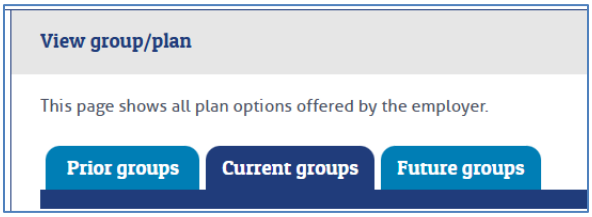
Plan Administration

Plan Details

On the left side of the homepage features are available based on the access granted to each user, so not all features may be available to all users.

From *View Group/Plan* you are able to view:

- Prior groups (Effective within the last 12 months)
- Current groups
- Future groups (If applicable)



Billing

The billing section allows you to view your billing, pay your bill or enroll in auto pay.

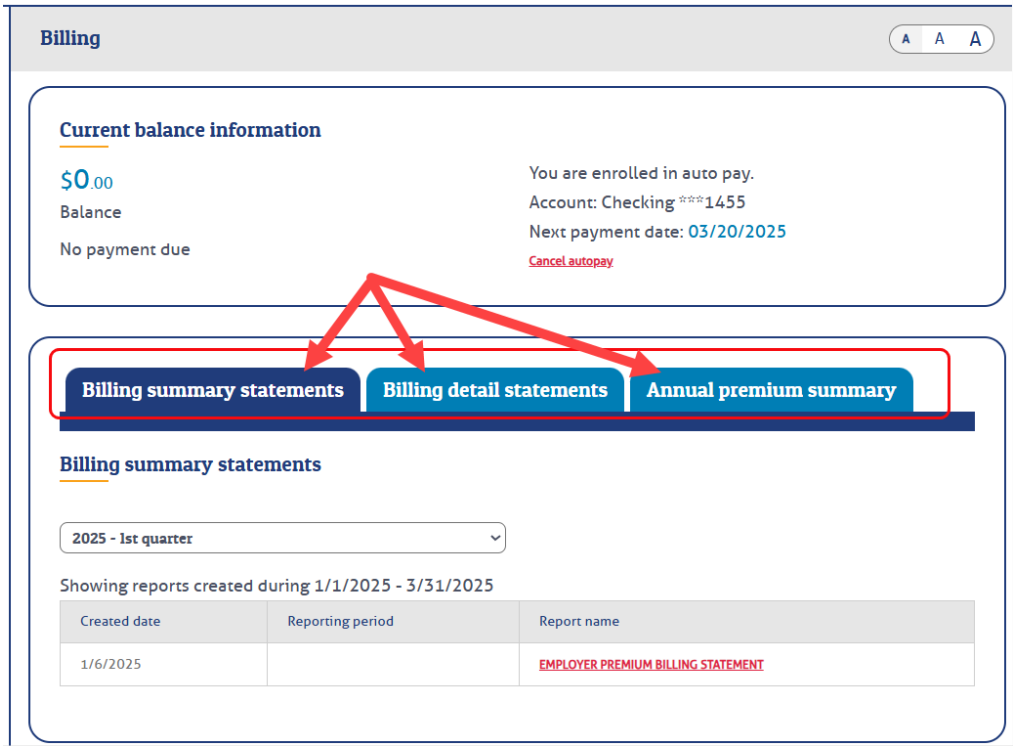
View Billing

The current balance information will display in View Billing.



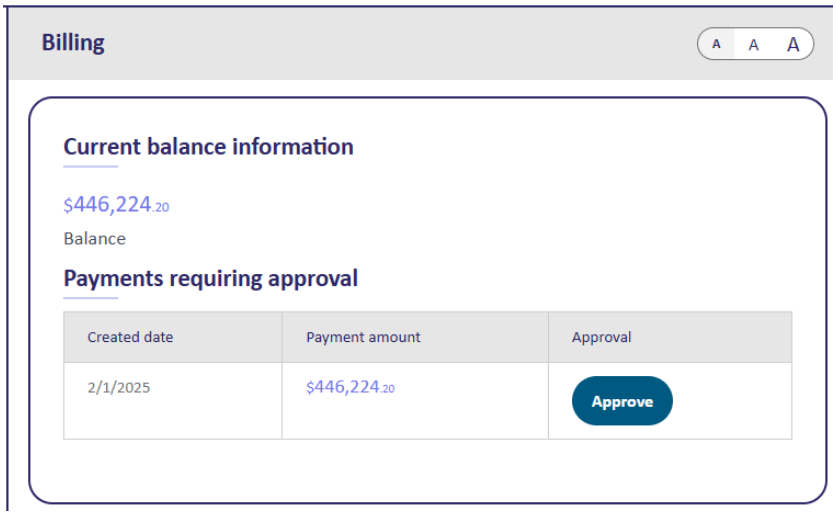
View statements or summary by selecting one of the following tabs:

- Billing summary statements
- Billing detail statements
- Annual premium summary

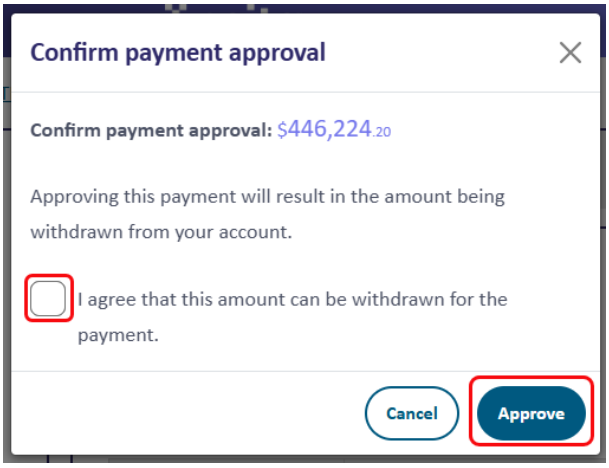


APPROVE BILLING – (INSITE ONLY)

1. Click **Approve**

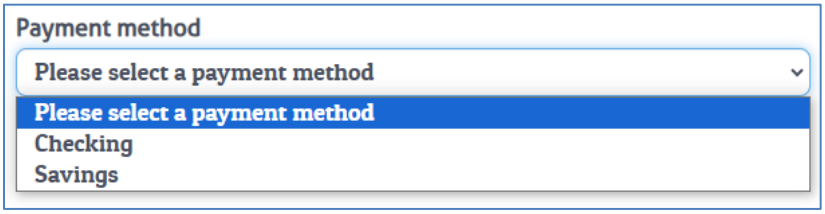


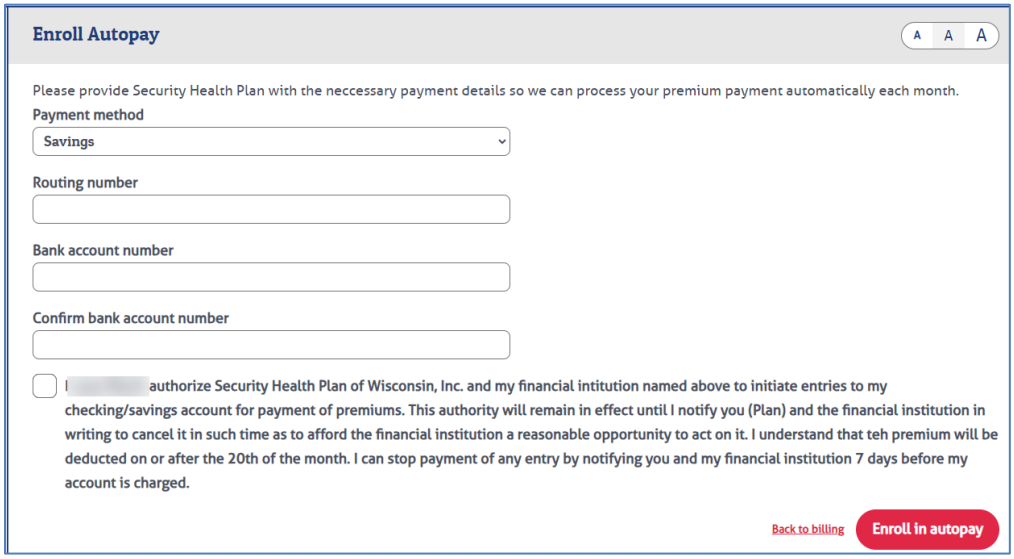
2. Check the box to agree and click **Approve**.



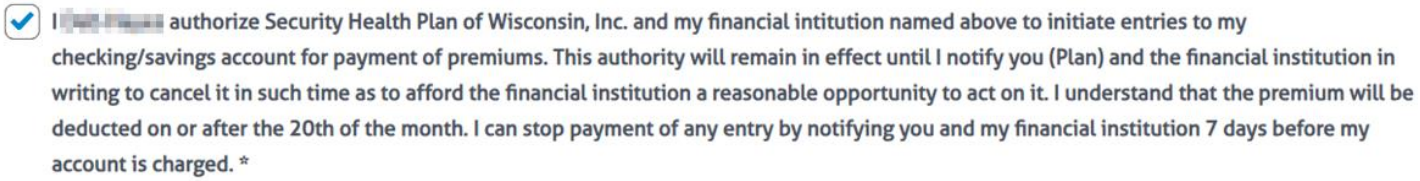
ENROLL IN AUTO PAY

1. Click Enroll in auto pay .
2. Select a payment method:
3. Enter Routing number, Bank account number and Confirm bank account number.





4. Check the box to authorize



5. Click Enroll in autopay and then you will receive a confirmation page and an email.



SecurityHealth Plan℠
Promises kept, plain and simple.®

Automatic Premium Payment Enrollment Confirmation

Hello Lana,

You have successfully enrolled in our automatic premium payment plan.

Your first payment will be withdrawn from your account with Checking ***214 on Aug. 20, 2023. August's payment will process via autopay.

If you have questions, please contact Accounts Receivable at 1-800-472-3450, ext. 19474 or 715-221-9474. If you are hearing- or speech-impaired, please call TTY 711. Our office hours are Monday through Friday, 8 a.m. to 5 p.m.

Thank you,
Security Health Plan Accounts Receivable

DO NOT REPLY TO THIS E-MAIL / INFORMATION ONLY / RESPONSES ARE NOT MONITORED
The contents of this message may contain private, protected and/or privileged information. If you received this message in error, you should destroy the e-mail message and any attachments or copies, and you are prohibited from retaining, distributing, disclosing or using any information contained within.

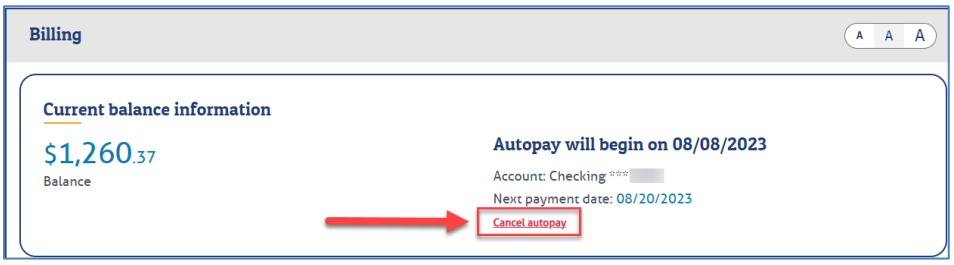
11016_07-23

Security Health Plan of Wisconsin, Inc.

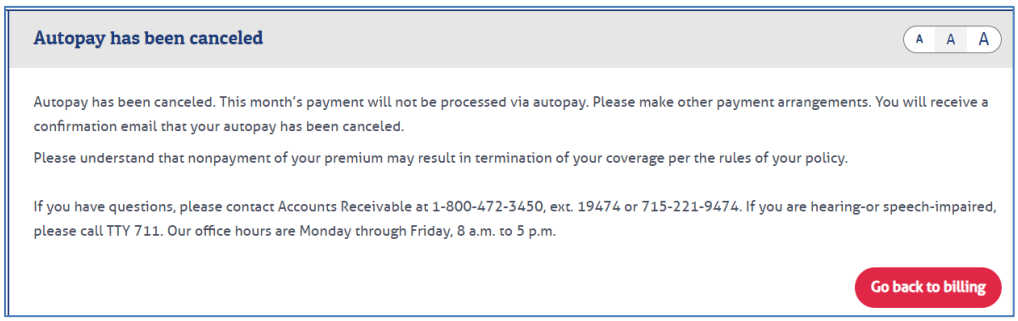
Note: Enrolling in autopay from the 1st though the 9th of the month, the autopay will be effective for current month's withdrawal. If enrolling on the 10th through the end of month, your effective date is the 1st of the following month.

CANCEL AUTOPAY

1. To cancel your autopay, from the Billing section, click Cancel autopay :



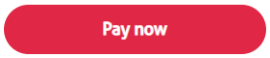
2. Click Confirm cancellation .

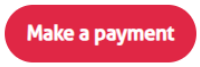


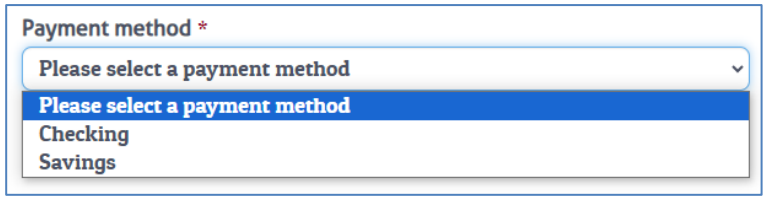
You will receive a confirmation page and an email.

Note:	Cancelling autopay the 1st through the 14th of the month, will cancel the current month's withdrawal and other payment method will need to be arranged. Cancelling autopay the 15th through the end of the month, will cancel the following month's payment but the current month's premium will be withdrawn.

ONE TIME PAYMENT

1. To make a one-time payment click 

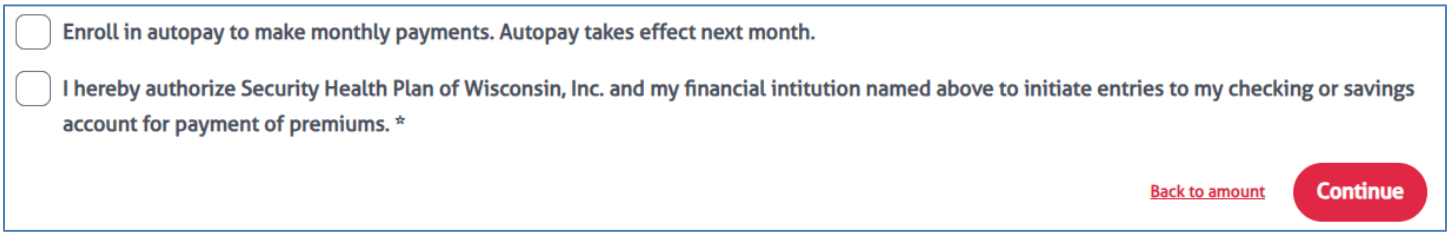
from the Billing section.
2. Click 

.
3. Select a payment method: 

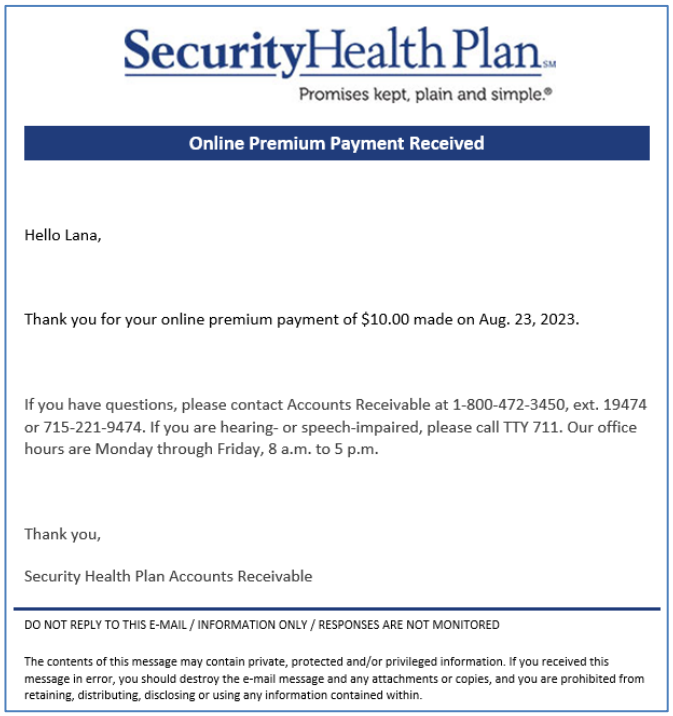
and click 

.
4. Enter the following:
   - Payment method
   - Full name on bank account (30 Character limit)
   - Routing number
   - Bank account number
   - Confirm bank account number
   - Billing address
   - City
   - State
   - Zip code
5. Check authorization of payment and enroll in autopay if applicable and click 

.



6. A confirmation email will be sent to user:



SecurityHealth Plan℠
Promises kept, plain and simple.®

Online Premium Payment Received

Hello Lana,

Thank you for your online premium payment of $10.00 made on Aug. 23, 2023.

If you have questions, please contact Accounts Receivable at 1-800-472-3450, ext. 19474 or 715-221-9474. If you are hearing- or speech-impaired, please call TTY 711. Our office hours are Monday through Friday, 8 a.m. to 5 p.m.

Thank you,

Security Health Plan Accounts Receivable

DO NOT REPLY TO THIS E-MAIL / INFORMATION ONLY / RESPONSES ARE NOT MONITORED

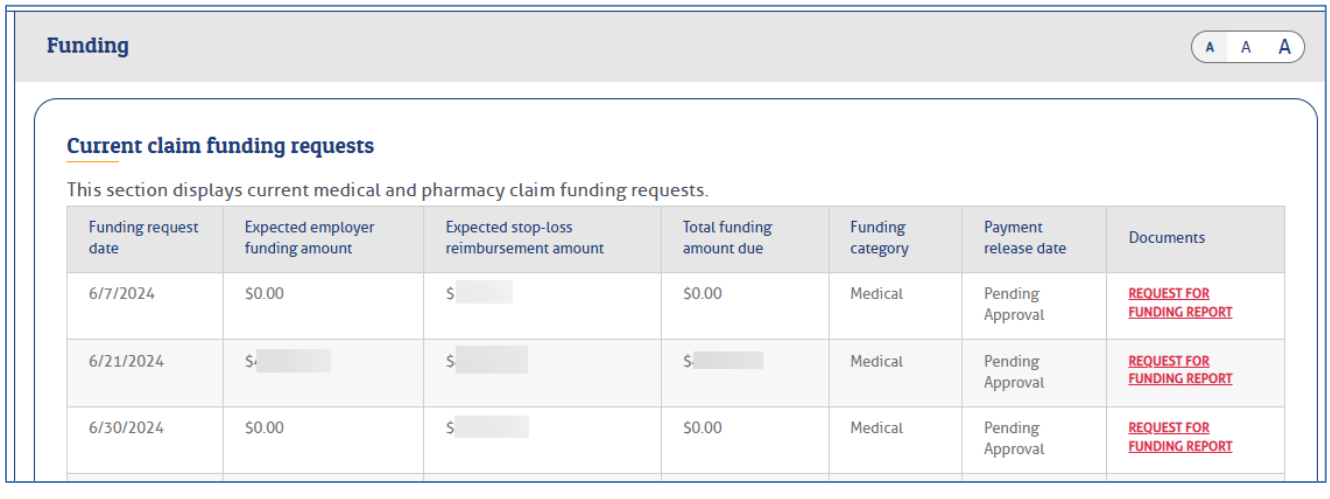
The contents of this message may contain private, protected and/or privileged information. If you received this message in error, you should destroy the e-mail message and any attachments or copies, and you are prohibited from retaining, distributing, disclosing or using any information contained within.

Claim funding (Insite only)

From the *View Funding* section, you can view current and completed claim funding requests.

Current claim funding requests

This section shows current medical and pharmacy claim funding requests, type or category of funding, status, & the document regarding the specific request.



Funding A A A

Current claim funding requests

This section displays current medical and pharmacy claim funding requests.

Funding request date	Expected employer funding amount	Expected stop-loss reimbursement amount	Total funding amount due	Funding category	Payment release date	Documents
6/7/2024	$0.00	$	$0.00	Medical	Pending Approval	REQUEST FOR FUNDING REPORT
6/21/2024	$	$	$	Medical	Pending Approval	REQUEST FOR FUNDING REPORT
6/30/2024	$0.00	$	$0.00	Medical	Pending Approval	REQUEST FOR FUNDING REPORT

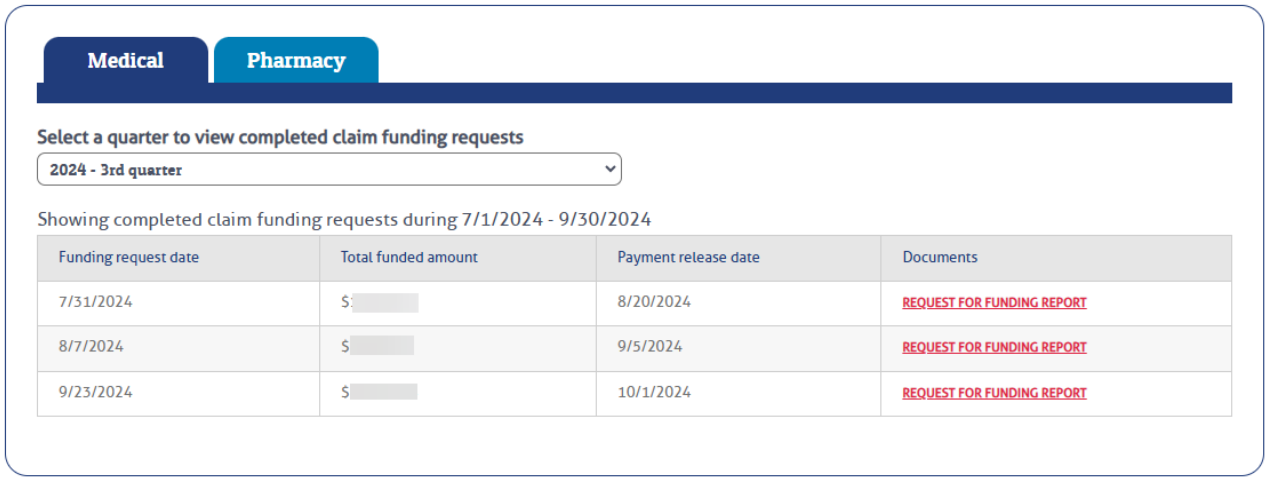
- **Funding request date** is when the claims payment was run.
- **Expected employer funding amount** is the amount of the total claims submitted by providers to Security Health Plan for payment that will fall within the parameters defined in the stop loss contract. This amount due will, in theory, be paid from the Stop Loss Carriers account, not the group.

- **Total funding amount due** is the amount of the total claims submitted by providers to Security Health Plan for payment that the group is responsible for paying.

View completed claim funding requests

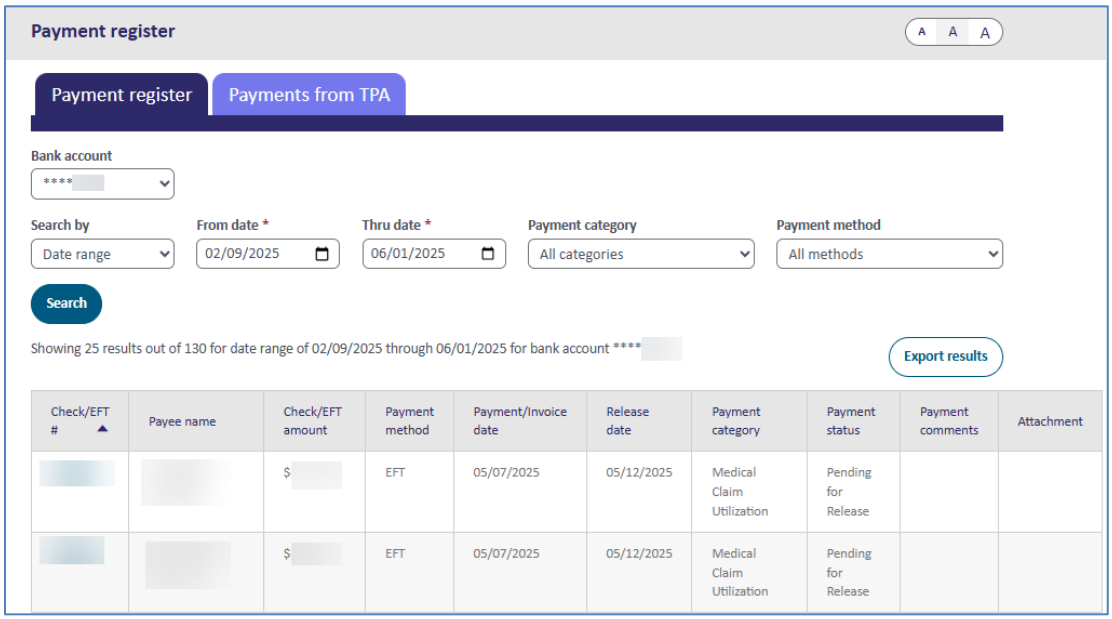
This interactive section allows you to quickly filter completed requests by:

1. Medical or Pharmacy tab
2. Drop-down selection for a specific quarter of the calendar year



Payment register (Insite only)

The *Payment Register* section shows all payments on the employer/group-owned bank accounts.



Filter or Search the Payment register

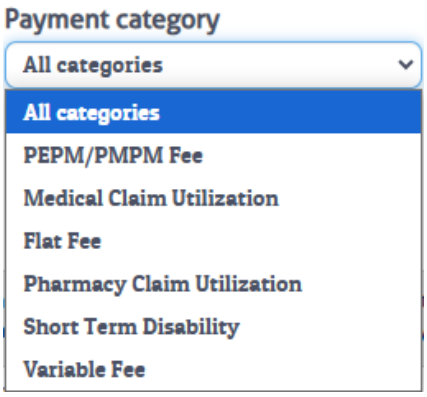
Filter results by:

- Date range (default shows 4 months of data leading up to the 1st of the following month)

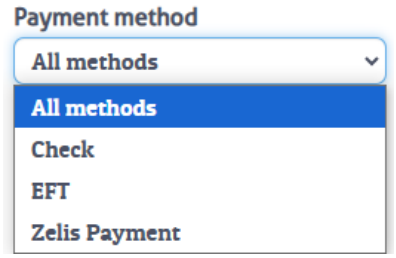
- Payee name (will search by field contains, not starting with)
- Check/EFT # (will search for exact match or range)
- Payment status
- Payment Category
    - PEPM/PMPM Fee is where admin fees are billed per employee per month (PEPM) or per member per month (PMPM).

      Note: **For PEPM/PMPM fees, adjust the payment Thru Date to the designated future payment date.**

    - Flat Fee is where admin fees are a set amount every month.
    - Variable Fee is where admin fees vary each month.

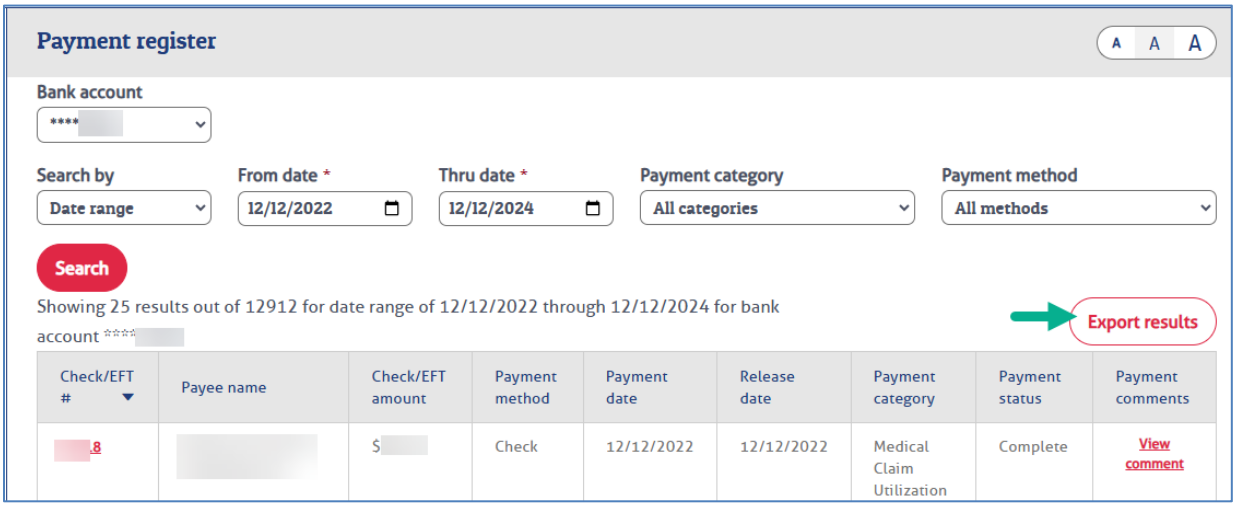


- Payment method (add drop-down list for payment method)



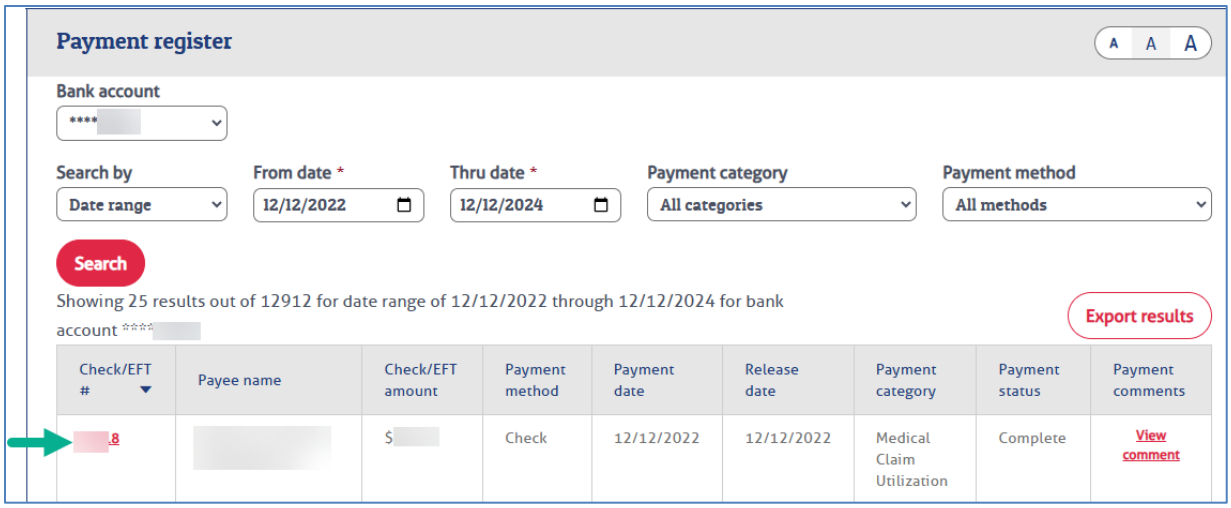
Export search results

Click Export results to export the search results to Excel.

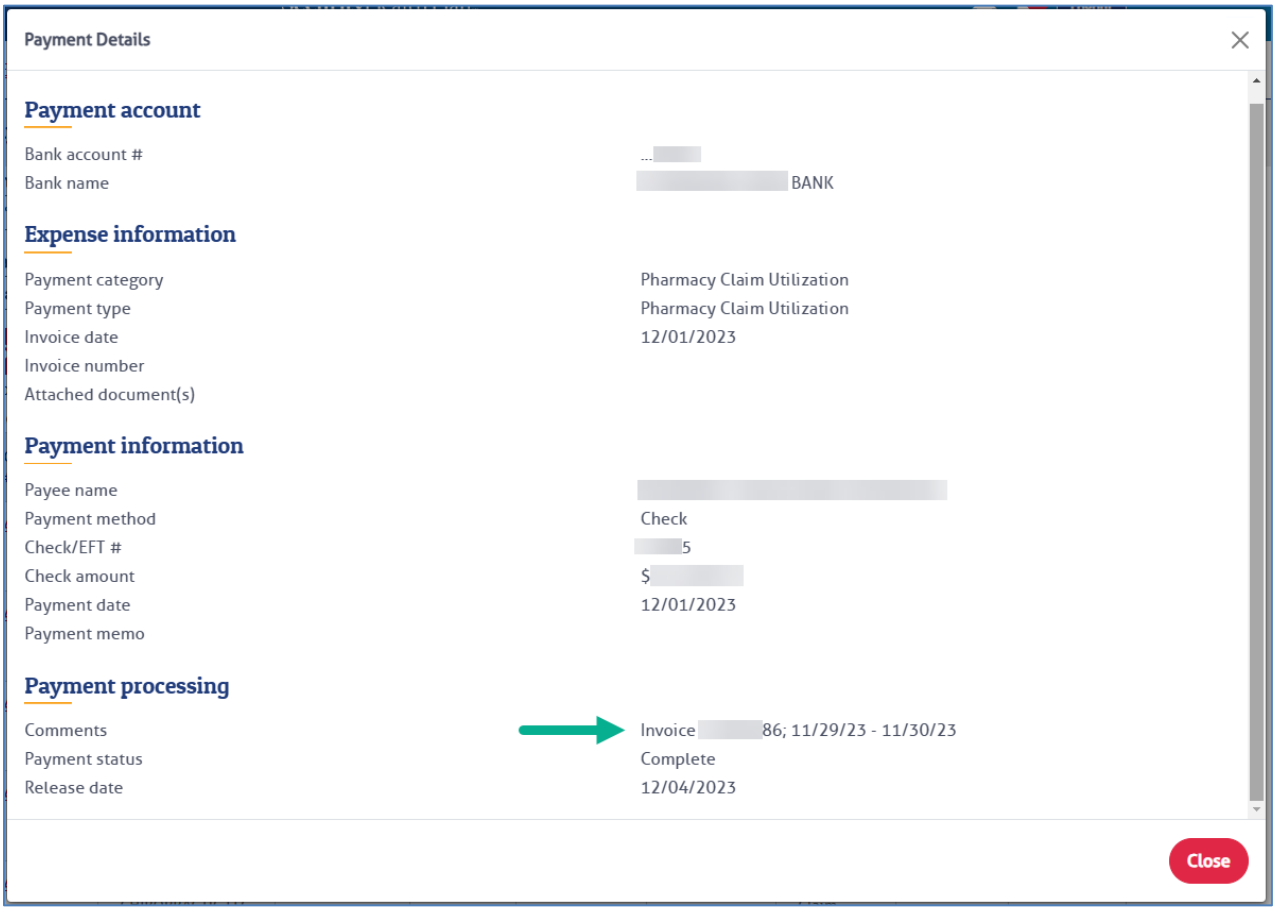


View payment details

Click on a specific Check/EFT # payment to view details of the specific payment.

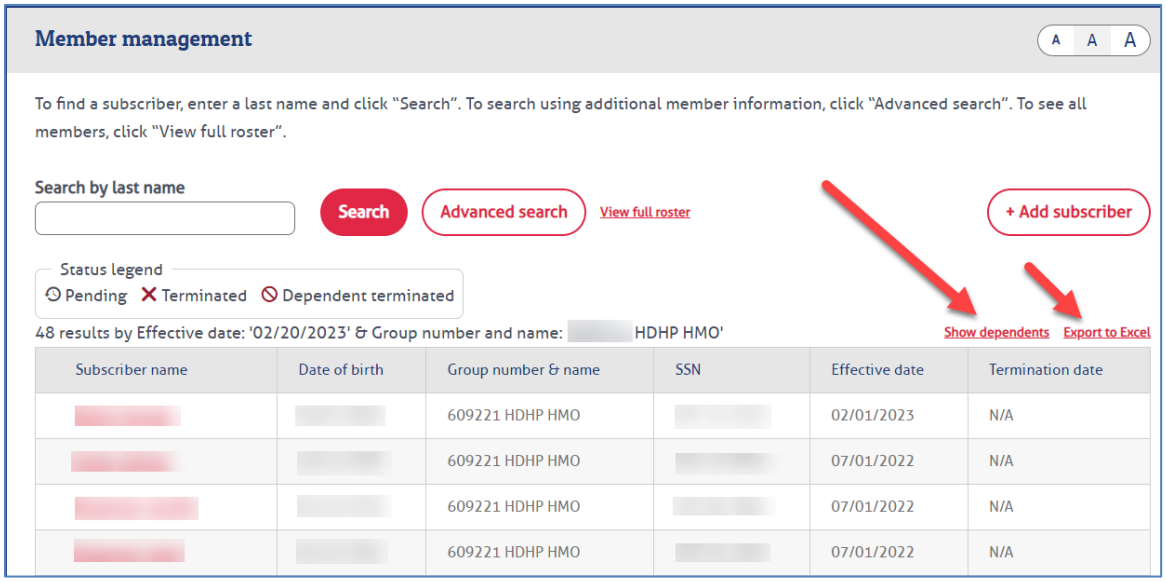


Payment details will vary based on payment status. Payment comments will also appear in the payment details.

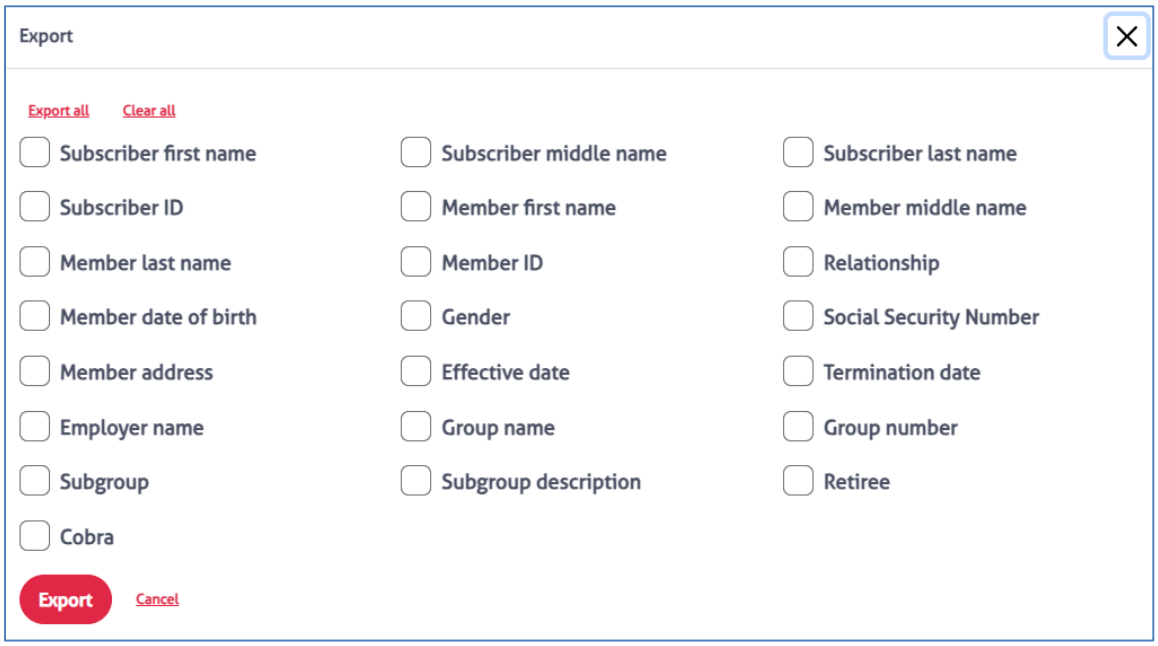


Member management

Member management allows you to view your full roster, or specific members. Click View full roster to view all subscribers. Once the roster is displayed, click Show dependents to view spouse and/or dependents. To view pending or termed enrollment(s), click Advanced search and change date range.



To export the census to Excel, click Export to Excel . Before exporting, a prompt will appear to select all the features or the ones you want to export.



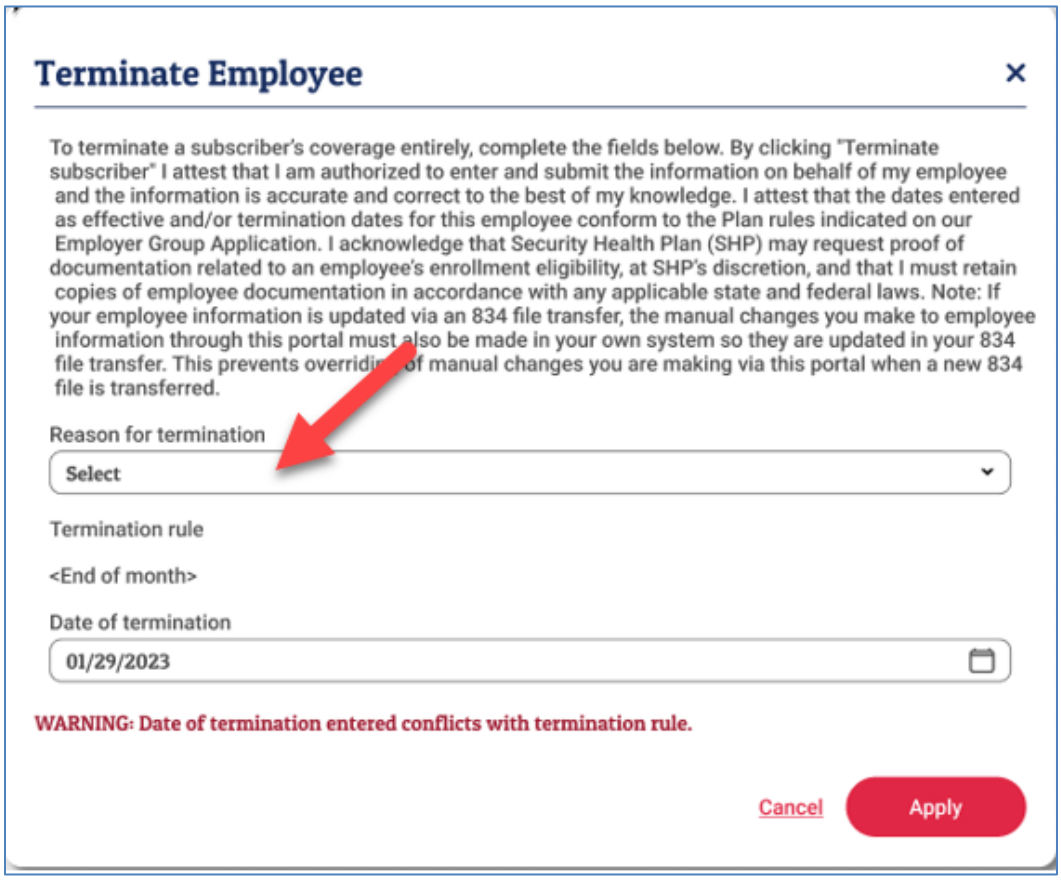
Add Subscriber or Dependent

Note: A hire date and effective date are required. Please calculate the employee's effective date based on their waiting period. A warning will appear if the effective date does not meet the established waiting period. If the date you are entering is intended, you may override the warning.

1. To add subscribers to your roster click + Add subscriber.
2. Enter required details as indicated with a *.
3. Click Add dependent to add spouse and/or children, if applicable.
4. When complete click Create subscriber family.

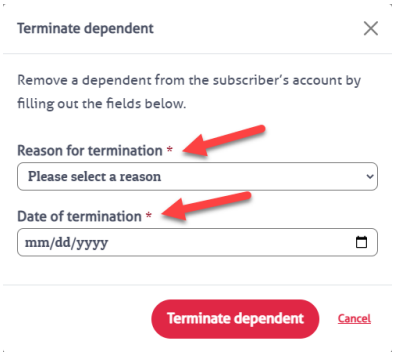
Terminate Subscriber

1. Locate Subscriber from full roster or search for Subscriber.
2. Click Terminate subscriber.
3. Select *Reason for termination*.
   Note: Termination date will be based on Termination Rule.
4. Click Apply.



Terminate a dependent

1. Locate Subscriber from full roster or search for Subscriber.
2. Scroll to ***Dependents*** and click on the down arrow to the right of the Dependents name.
3. Click Terminate dependent.



4. Select *Reason for termination*.
5. Click Terminate dependent.

New Plan/Change Plan

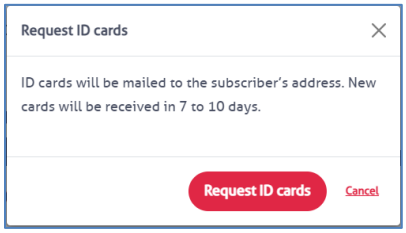
New plan *New plan* is for adding a new plan after coverage has ended.

Note: When adding a re-hire, use the *New Plan* option.

Change plan *Change plan* is to change an active member's plan to another existing plan without a lapse in coverage.

Order New ID Card

1. Select Subscriber and click Request ID cards.
2. Click Request ID cards again to order.

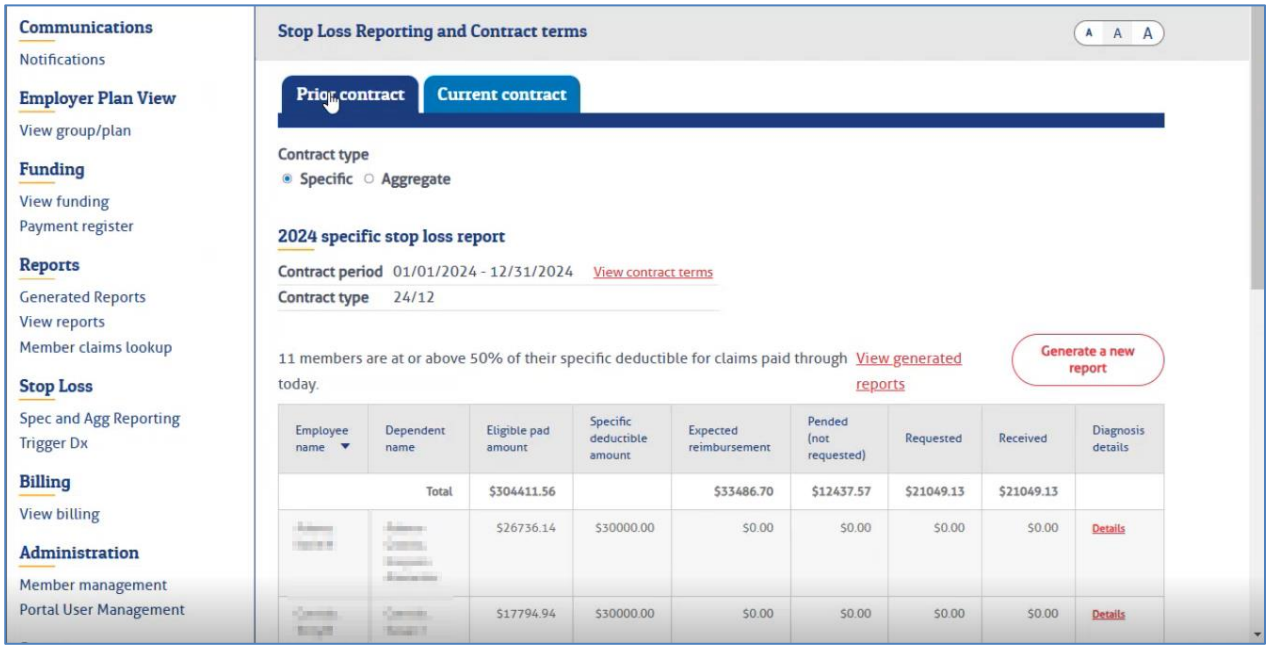


Note: To order ID cards for members with future eligibility, please call Security Health Plan Customer Service at 800-472-2363.

Stop Loss - (Insite only)

Spec and Agg Reporting

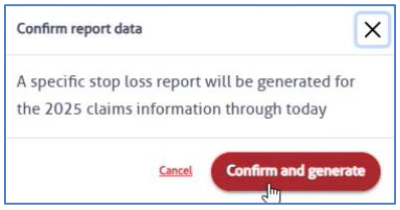
On the *Spec and Agg Reporting* screen you can view enrollees with claims above the high-cost threshold. At the top you can toggle between the type of stop loss coverage, *Specific* or *Aggregate*, and toggle between *Prior Contract*, *Current Contract*, and *Future Contract* (when applicable).



Generate a new report

Follow these steps to create a report matching the current criteria on screen:

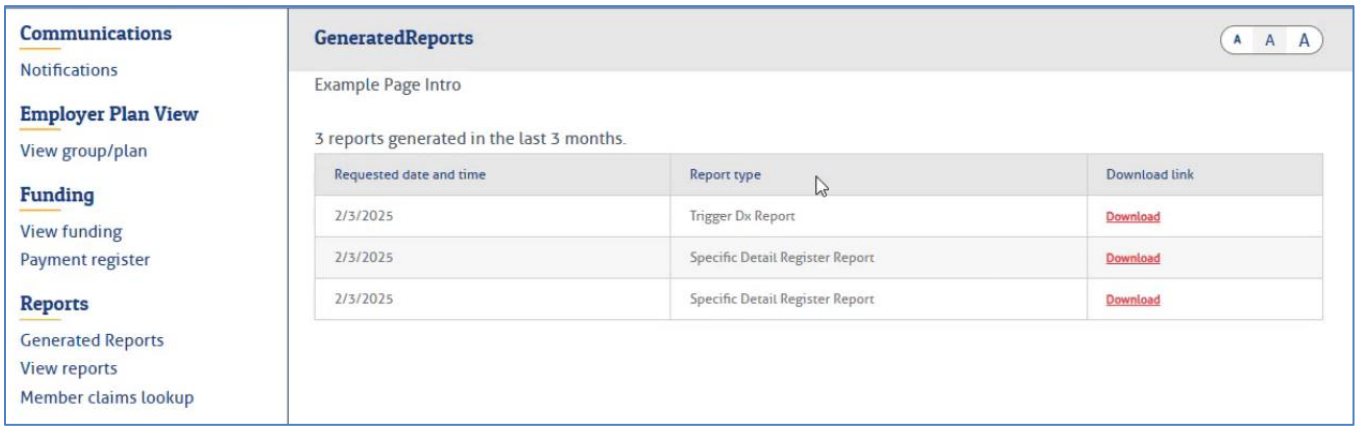
1. Click on the *Generate a new report* button



2. Click *Confirm and generate* on the popup screen.

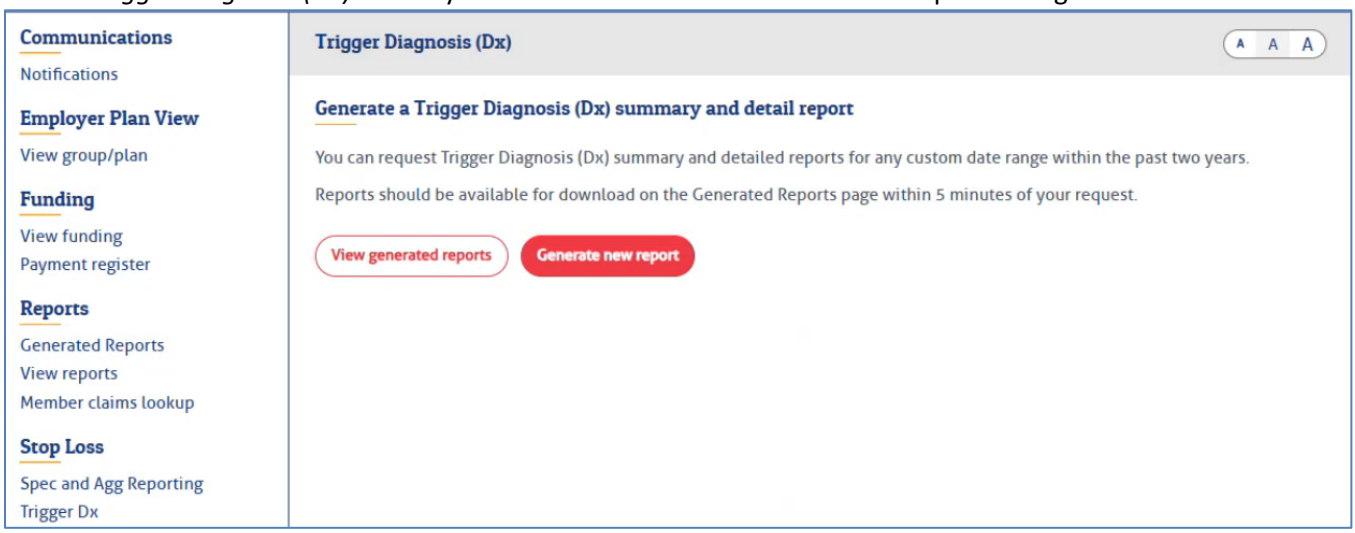
View generated reports

Under the Reporting section, go to Generated reports you've generated previously, click *Generated reports* and that will display reports specific to the user and only show reports you have generated.



Trigger Diagnosis (Dx)

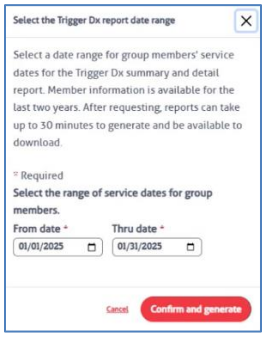
On the *Trigger Diagnosis (Dx)* screen you can view enrollees with claims with specific diagnosis codes.



Generate a new report

Follow these steps to create a Trigger Dx report:

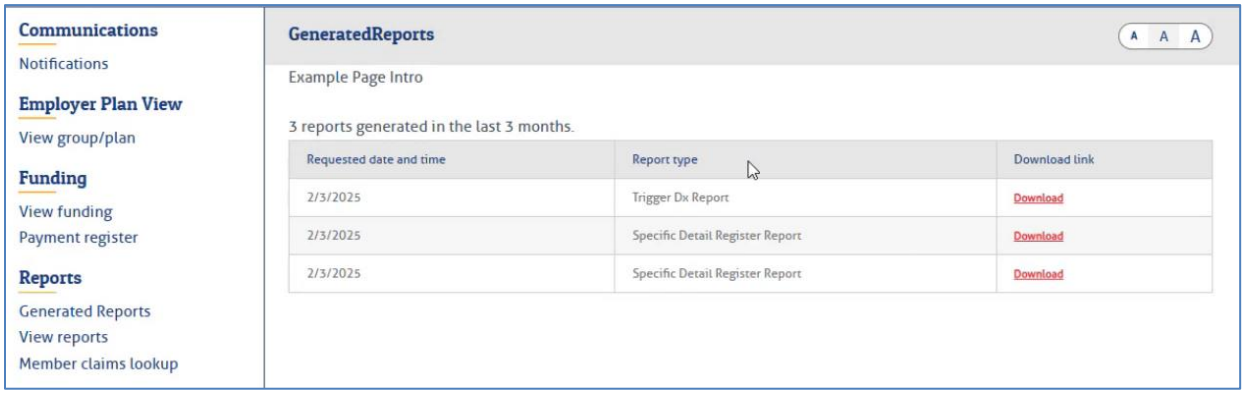
1. Click on the *Generate a new report* button



2. Click *Confirm and generate* on the popup screen.

View generated reports

Under the Reporting section, go to Generated reports you've generated previously, click *Generated reports* and that will display reports specific to the user and only show reports you have generated.



Reporting

Documents

From the *View reports* section, you can view reports based type of insurance, year, and quarter.

Fully Insured groups have the following report available:

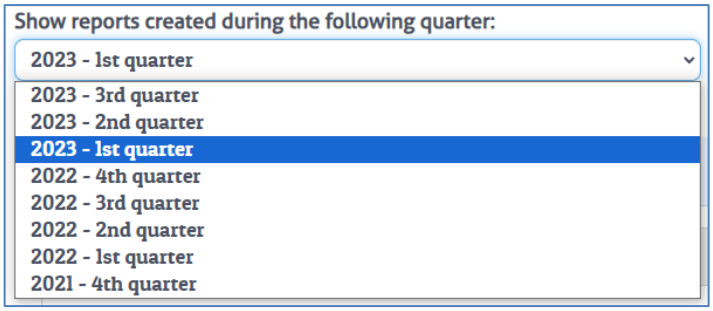
- Financial

Insite employers/groups will have the following reports available:

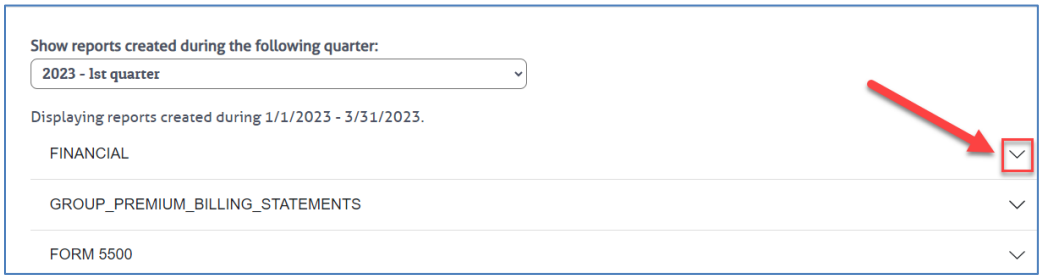
- Claim
- Financial
- Billing
- Enrollment
- Spec and Agg
- Trigger Dx

To view a report:

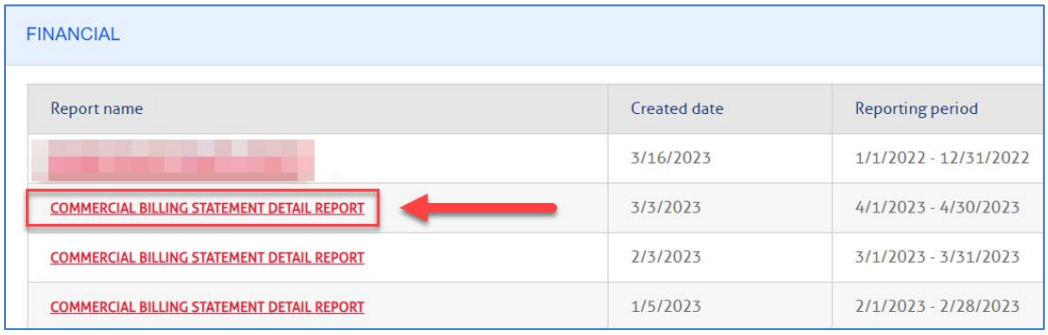
1. Select the appropriate quarter:



2. Click the chevron next to the category of reports you want to view:



3. Select the report name to launch:



Generated reports

User-generated formatted reports for stop-loss and Trigger Dx from the “Specific and aggregate” and “Trigger Dx sections”.

Member claims lookup (Insite only)

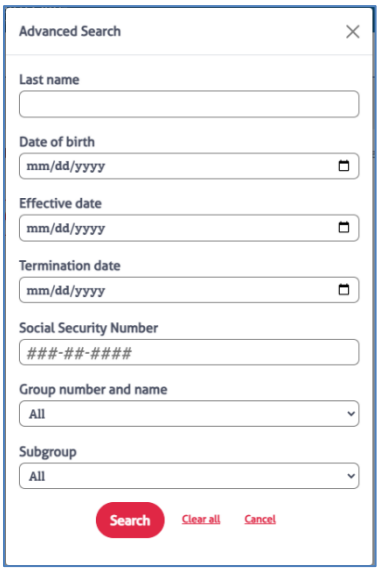
The billing section allows you to search member claims and view the details.

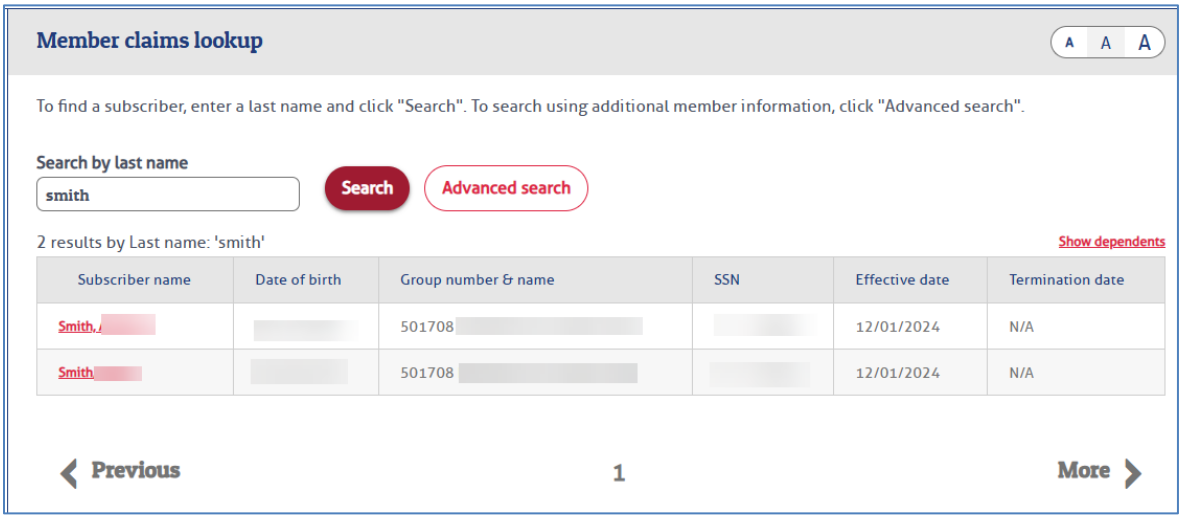
Search by member

Search by the subscriber’s last name.

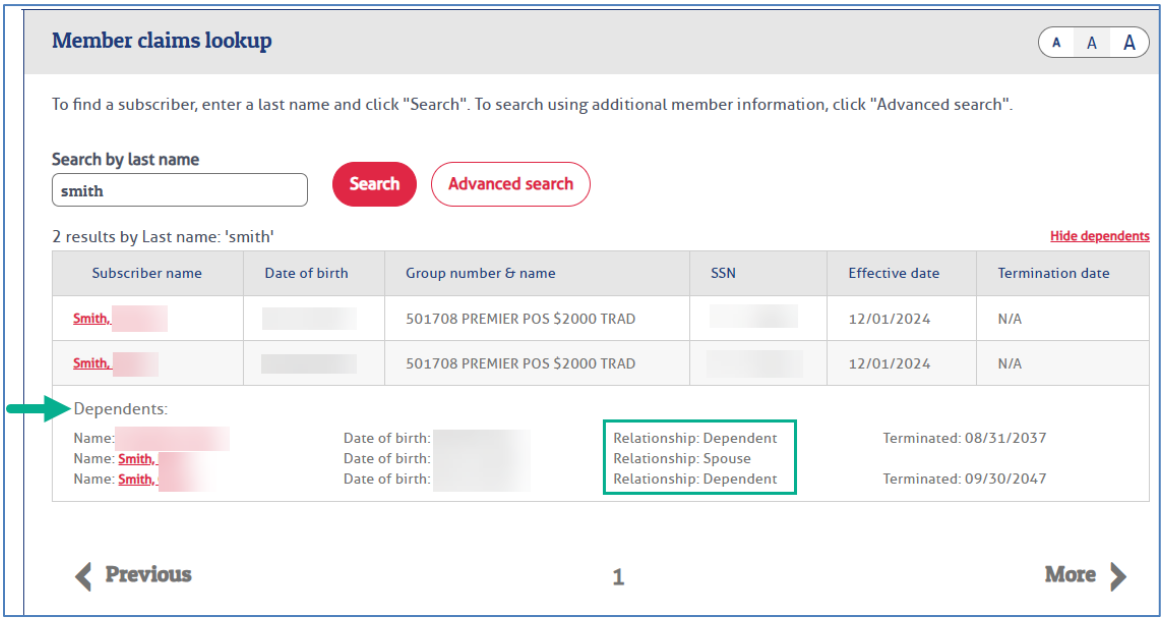
Use the Advanced search to searching using additional criteria such as:

- Last name
- Date of birth
- Effective date
- Termination date
- Social Security Number
- Group number and name
- Subgroup

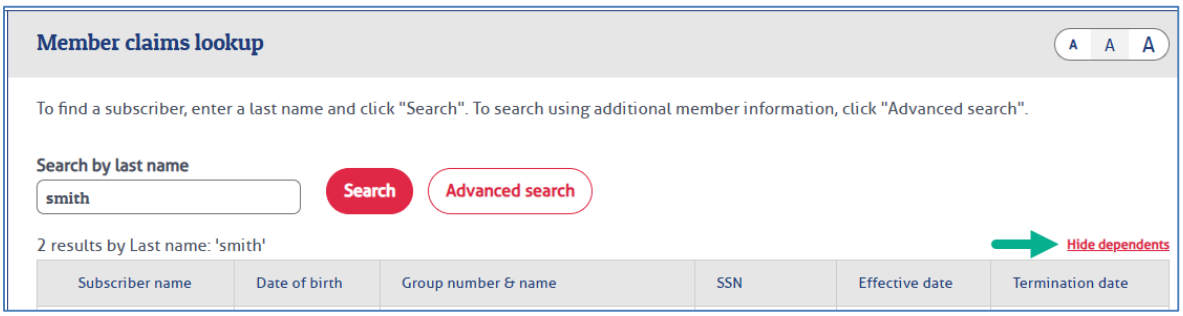




Click **Show dependents** to see the additional people on the subscriber's plan and the relationship.



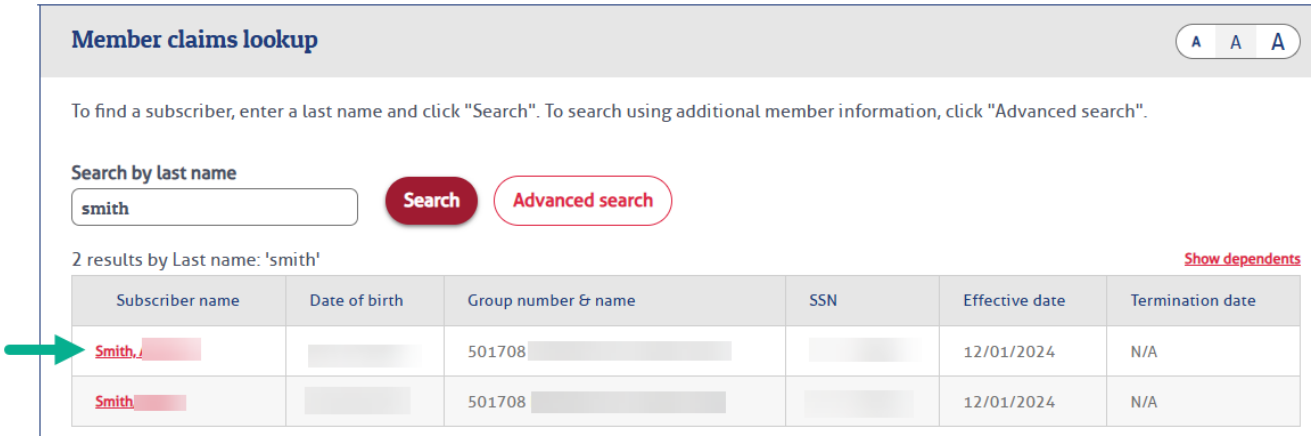
Click **Hide dependents** to remove dependents from the view.



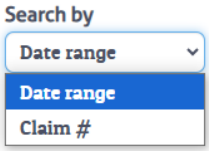
View claims and details

To view claims:

1. Search for the subscriber.
2. Click on the subscriber's name.

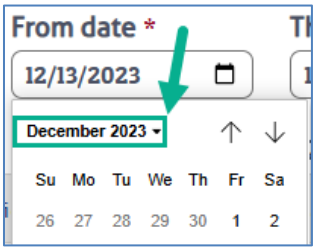


3. Choose the Search by criteria of date range or claim number.

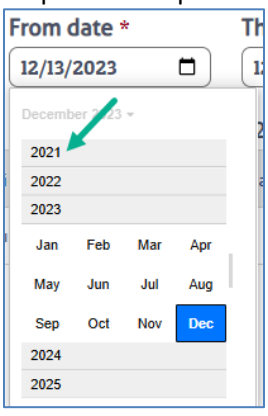


Note: *The From Date and Thru Date must be within a year of each other.*

   a. When using Date range search, use the calendar feature to select the date range.
   b. Click 🗔 in the date field.
   c. Click the Month Year header in the calendar to view the interactive calendar.

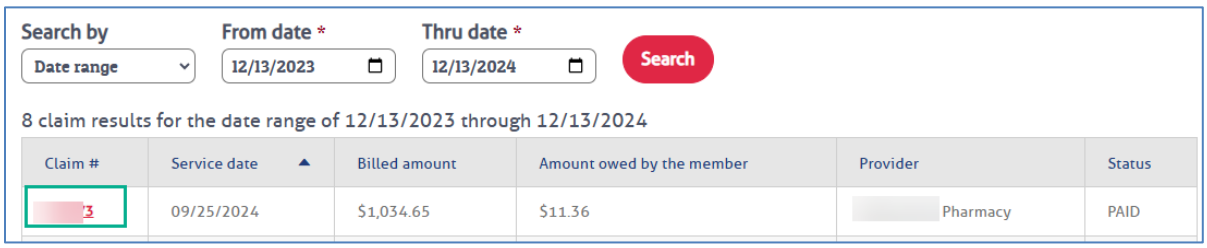


   d. Scroll up to view a previous year.

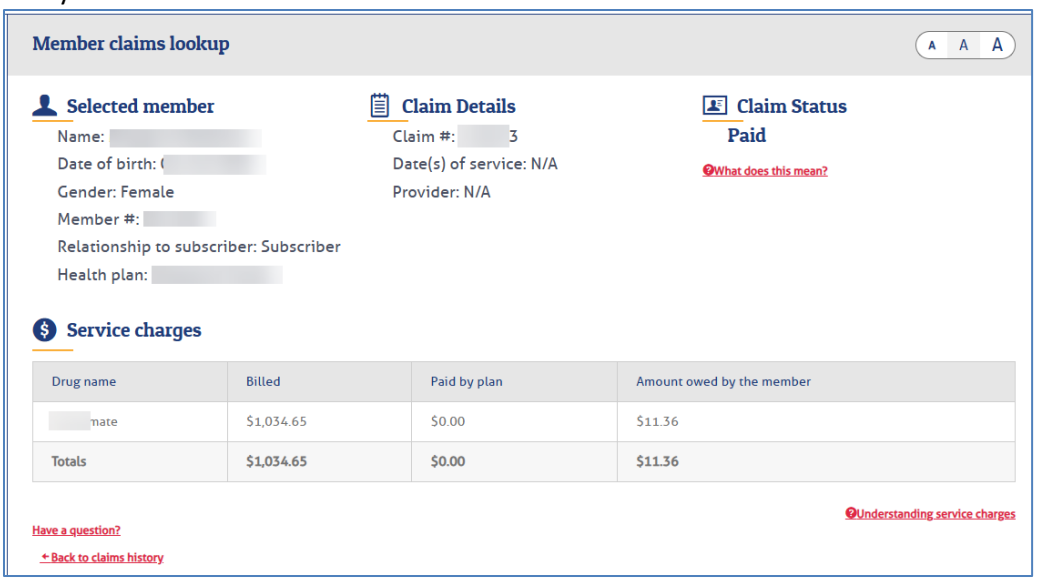


   e. Click on the year, then the month, and then the day.

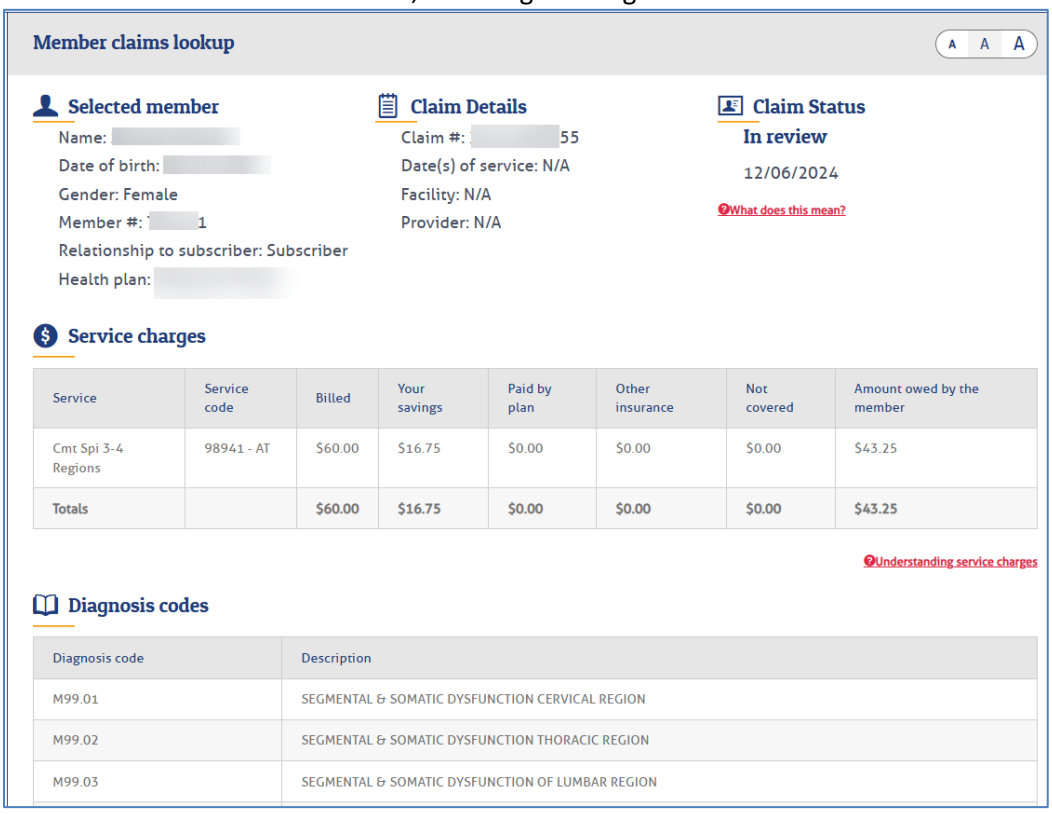
4. Click the Claim # to view the claim details. Details will also include diagnosis codes.



5. Claims details:
   a. Pharmacy claims shows the details of the medication and cost.



   b. Medical claims show additional details, including the diagnosis codes.

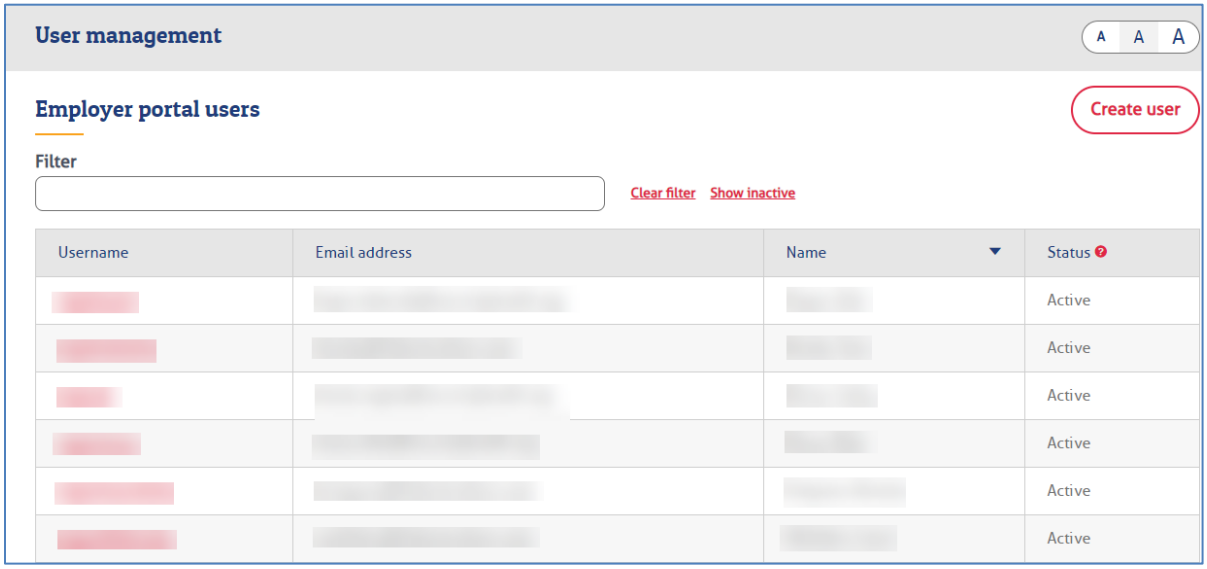


6. Click ← Back to claims history to return to the claims list.
7. Click ← Back to all members to return to the member list.

My Account

Portal user management – For Admin users only

From the Employer portal users section you can add, modify or deactivate portal users.

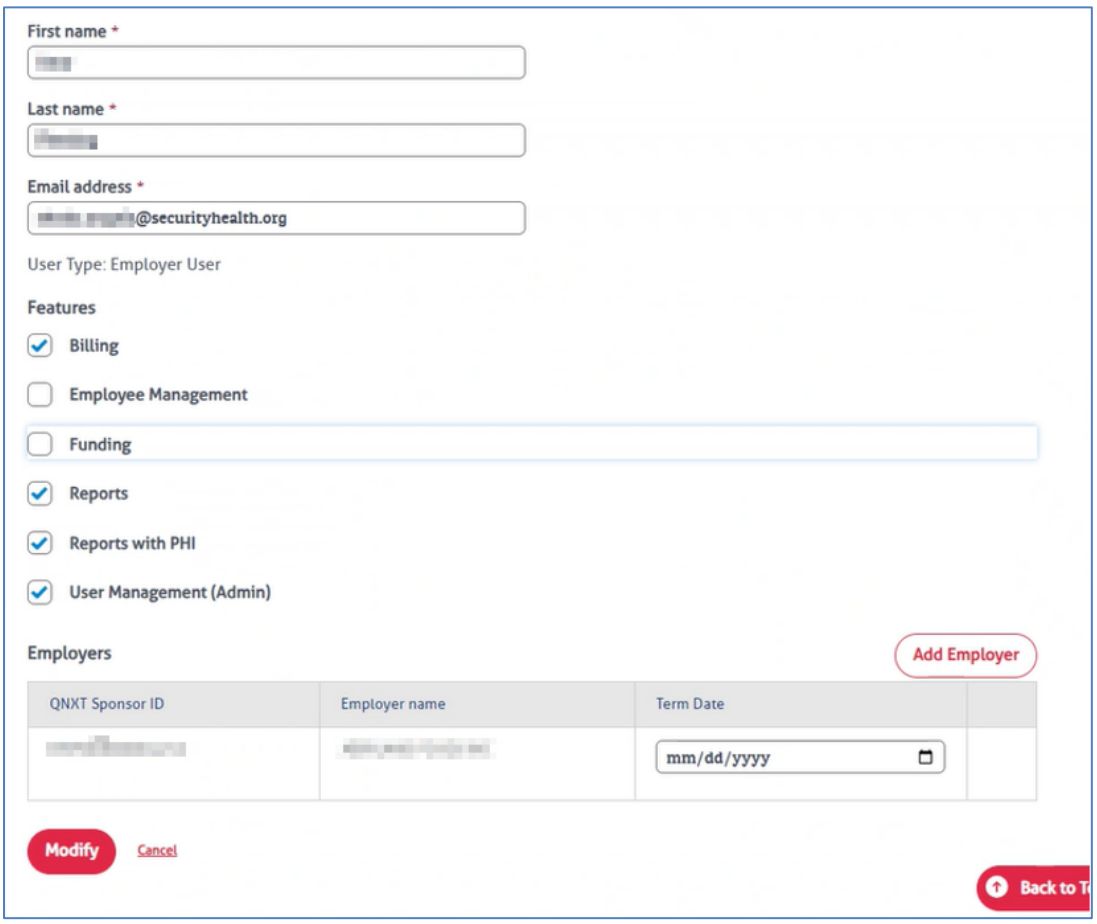


Create portal user

1. Click Create user.
2. Enter Username, First name, Last name, and Email address.
3. Select appropriate Features.
    - Billing
    - Employee Management – Portal user ability to add, change or terminate employee coverage
    - Funding
    - Reports with PHI – detailed premium statement
    - Reports – Premium summary
    - User Management (admin)
4. Click Create.
5. An email will be sent to the new user to register.

Deactivate or Modify portal user

1. Click on Username.
2. Click Modify.
3. Check/Uncheck Features (notification types).



4. Click Modify again to save changes.

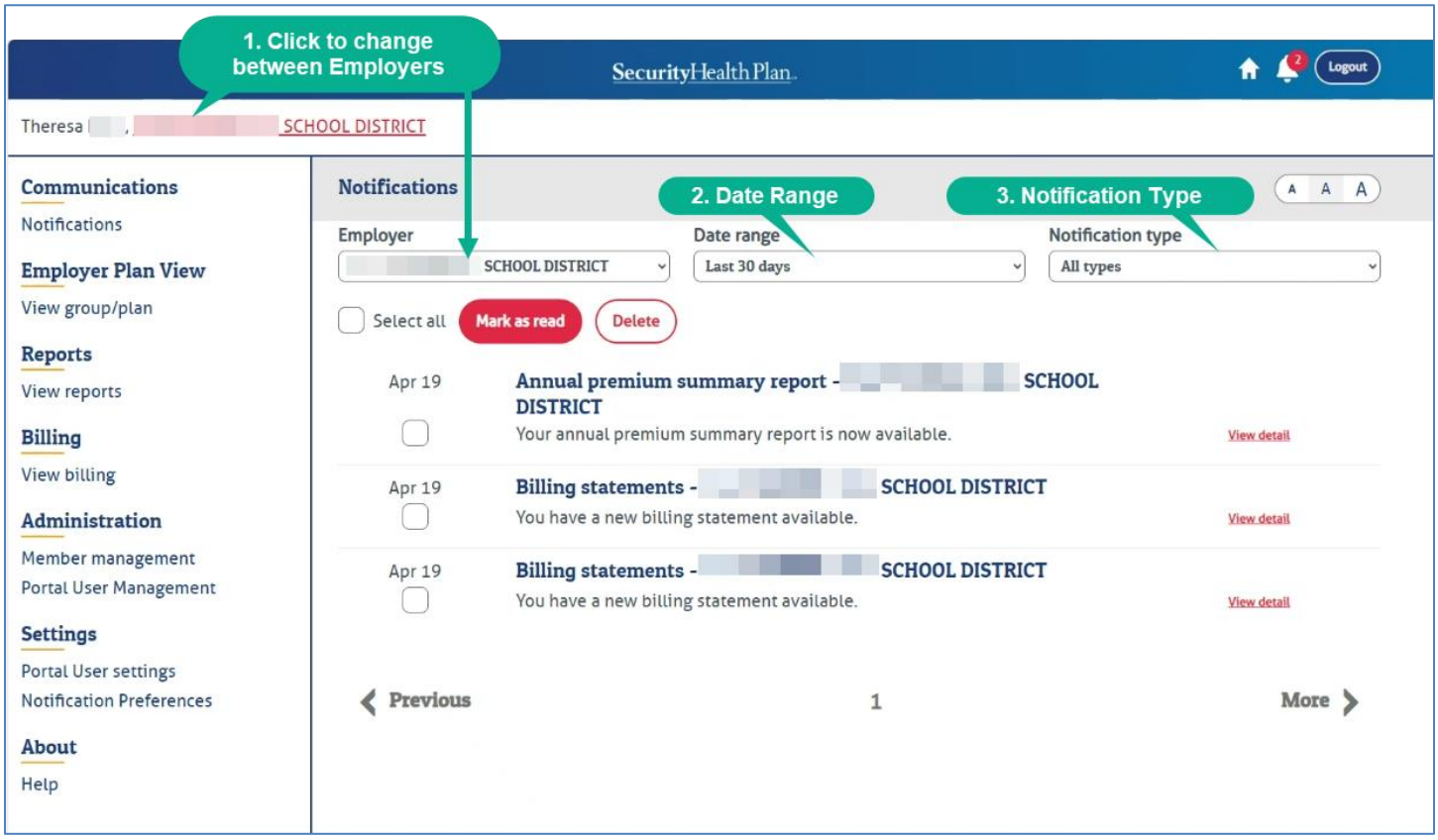
Portal user settings

The *Portal user settings* allows you to update a username, password or change an email.

Notifications

On the left navigation page, under Communications, click Notifications to go to the notifications page. The page will load notification for the employer you are currently viewing.

Note: To change employers, click the red employer name at the top and choose a different employer. Employers are displayed based off broker, not agency.

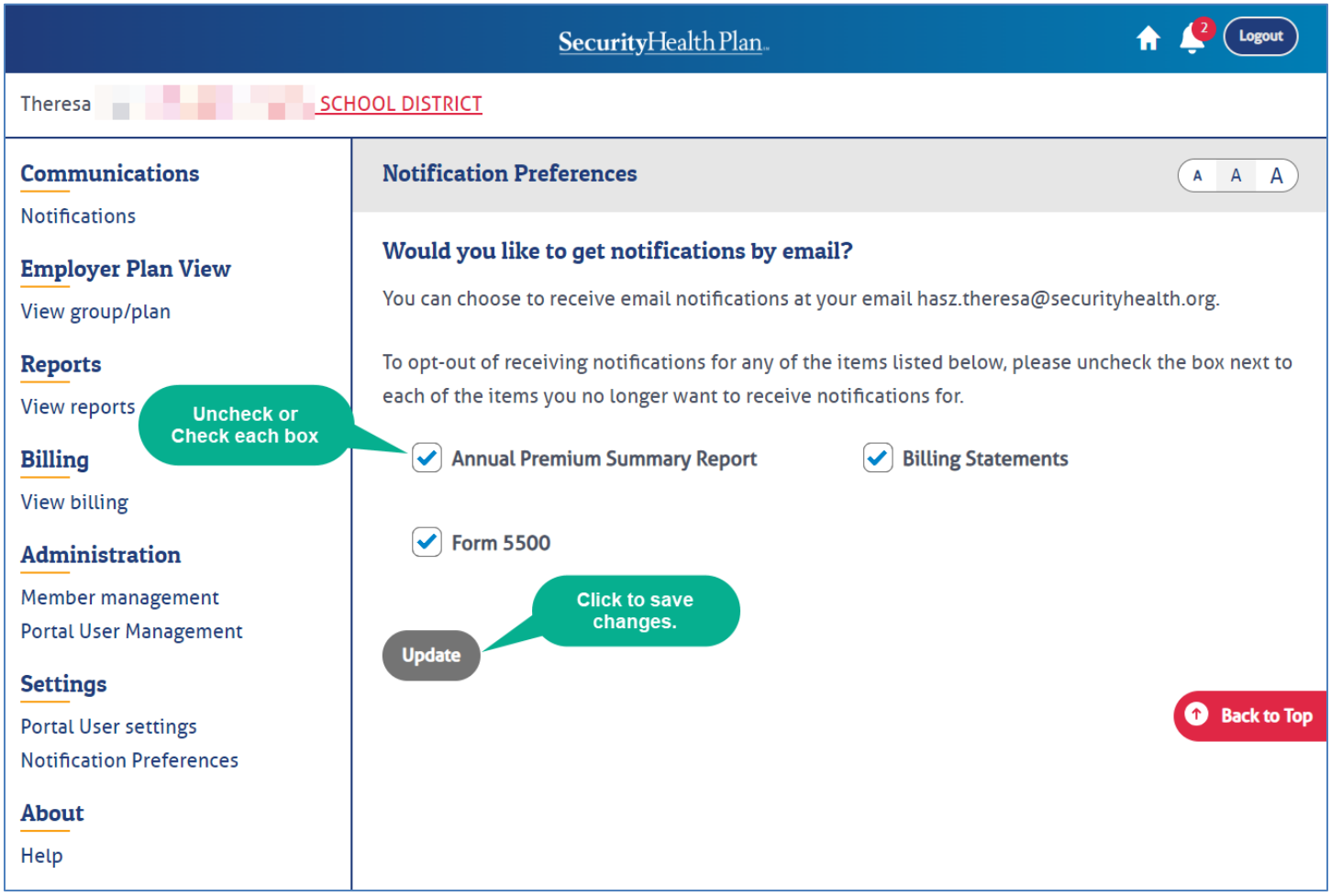


Filter notifications by:

1. The employer's name:
    a. Click the drop down to view notification for other employers.
    Note: Be cautious to ensure you are viewing the correct report for the correct group.
2. Date Range options:
    a. 30 days
    b. 60 days
    c. 90 days
    d. Custom – up to one year
3. Notification Type:
    a. Click the drop down to filter notifications by type.
    Note: Notification types will vary based on the type of employer group.

Notification Preferences

Manage your notification preferences:



1. Under Settings, click Notification Preferences.
2. Uncheck the box for each notification type you wish to opt-out of email notifications.
   Note: Uncheck notification box will opt-out of emails. Notifications will still appear in the portal.
3. Click Update to save your changes.

About

Help

The *Help* section displays phone numbers and hours of operations for various areas of Security Health Plan.