**Employer Portal Reference Guide**

This reference guide illustrates how to register and use Security Health Plan’s Employer Portal for groups who are insured by Security Health Plan.

- **Changes** – If you are terming a member from one group and moving to another group number, term the current plan and enter a note regarding which plan to move member to.
- **Cobra** – If Security Health Plan is administering Cobra, in the comments section enter a note to send out cobra paper indicating family or single policy, and what benefits are to be offered dental, flex, HRA, vision, etc.
- **Future Enrollments** - Future enrollments will not appear in the portal until effective date. Also, if an employer is adding a new employee to a group without current membership, a paper application is required.

### Registration

To register for the Employer Portal click one of the following links and complete the **Employer Group Access Request** form:

**Employer Group Access Request - Large Group** - Large Group – for employers with 51 employees or more

**Employer Group Access Request - Small Group** - for employers with 2 to 50 employees

Or go to [www.securityhealth.org](http://www.securityhealth.org),
1. Scroll to the bottom of the page.
2. Select **Employers**.
3. Select **Large employer access request** or **Small employer access request**.

### Other Documents/Links

**Insert link for electronic change from sales**

### Logging In

Once registered and information is received, log in to the employer portal.
1. Go to [www.securityhealth.org](http://www.securityhealth.org)
2. Click **Employers**.
3. Click **Login**.
4. Enter username and password:

   ![Login](image)

**Enter requested number from your access card:**

![Access Card](image)

### My Employees

Changes to employee demographics can be made here.
1. From **My Employees** tab, click **Select Employee**
2. Enter Social Security or subscriber (12 digits) number:

   ![Select Employee](image)

   - **Changes/Requests include:**
     - Order new ID Card
     - Name Change
     - New Address/Phone
     - New Family Member
     - Remove Subscriber or Family Member
     - Eligibility History
     - Demographic History
     - Certificate of Coverage
Order New ID Card

**Note:** To order ID cards for members who have future eligibility please call Security Health Plan Customer Service at 888-978-0564.

1. To order a new ID card, enter employee social security or subscriber number.
2. Select **New ID Card**.
3. Enter number of card(s) requested.
4. Click **Submit**.

Name Change

1. Select **Name Change**.
2. Radio button name of employee or dependent.
3. Populate required fields, indicated by an asterisk (*).
4. Select number of cards.
5. Populate required fields, indicated by an asterisk (*).
6. Click **Submit**.

New Family Member

1. Select **New Family Member**.
2. Populate required fields, indicated by an asterisk (*).
3. Click **Add**
   - **Relationship** refers to the relationship the new family member has with respect to the policy holder.
   - **Effective Date** indicates when you would like to add the new family member to your plan. Requested effective date will be reviewed.
   - **Reason** selected for adding the new family member.

**Note:** If the reason is adoption, mail placement papers to Security Health Plan. If the reason is loss of coverage, mail proof of loss papers to Security Health Plan.

Remove Subscriber or Family Member

1. Select **Remove Subscriber or Family Member**.
2. Radio button family member to be removed.
3. Select reason for removal.
4. Enter the effective date for removal, the first date of ineligibility.
5. Enter Comments and click **Submit**.
6. Click **Yes** to confirm.
7. If additional family members need to be removed, click yes to question #5 and complete steps above.

**Note:** All cancellations need to be reported no later than 60 calendar days following the event. Credit will not be given for anything past 60 calendar days.

**Note:** A Certificate of Coverage and ID cards will be mailed after removal of a family member.

Eligibility History

To view eligibility additions, cancellations or deletions:

1. Select **Eligibility History**.

Demographic History

The Demographic History displays demographic information associated with each employee.

Certificate of Coverage

To receive a certificate of coverage, select the radio button in front of employee/dependent(s) name requesting the certificate. If the subscriber is selected, a Certificate of Coverage will be sent for all family members.

My Group

From **My Group** employers can make changes to the group’s demographics and view various reports.

1. Click **My Group**.
2. Navigate to the option needed by clicking on one of the following items:
   - New Subscriber Family
   - View Statements
   - Roster
   - Form 5500 – this option is not functioning
   - Employee Requests

New Subscriber Family

1. Complete form listed below:
2. Click **Next**.

3. Enter required fields for spouse and/or dependents.

   **New Subscriber Family**

4. Complete fields below:

   **New Subscriber Family**

5. Click **Next**.

6. Complete questions in form and mail any requested documentation.

   **Note**: Request(s) will vary depending on previous coverage(s).

7. Click **Next**.
1. Review form for accuracy. Click **Edit** to edit forms/fields.

2. When complete, click **Yes**.

**View Statements**

The View Statement section allows you to view your billing statements. To view additional statements, click **View previous statements** at the bottom of the form.

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**Roster**

2. To view member(s) of the group, specific group number, or the entire group, select one of the following options in the Roster form:

**Employee Roster**

1. Enter a social security number or last name to limit the employee roster search.

2. Select a group to limit the search further or you may select all groups.

3. Click **Search**.

**Note:** Additional options include **View Entire Roster** and **Show pending eligibility changes**. These links are located at the bottom of the Employee Roster Search form.

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**My Account Profile**

**My Account Profile** allows you to make changes to your administrative account for the group.

1. Click **My Account Profile**.

2. Select an option. Options include:
   - Change Password
   - Activity Log
• Change Email Address

Change Password
1. Click [Change Password].

Note: Password must be at least 7 characters long and must contain 2 letters and 2 numbers or symbols.

<table>
<thead>
<tr>
<th>Change Password</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your password must be at least seven characters long, and it must contain at least two letters and two numbers or symbols.</td>
</tr>
<tr>
<td>Current Password:</td>
</tr>
<tr>
<td>New Password: (minimum of 7 characters)</td>
</tr>
<tr>
<td>Confirm New Password:</td>
</tr>
<tr>
<td>Submit</td>
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</tbody>
</table>

Activity Log
1. Select a Start and End date.
2. Select an Activity option.
3. Click [Submit] to view activity log.

<table>
<thead>
<tr>
<th>Activities - Search</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fill in the fields below to retrieve the activity log.</td>
</tr>
<tr>
<td>Start Date: 02/23/2016</td>
</tr>
<tr>
<td>End Date: 03/24/2016</td>
</tr>
<tr>
<td>Activity: All Activities</td>
</tr>
<tr>
<td>Submit</td>
</tr>
</tbody>
</table>

Change Email Address
1. Click [Change Email Address].
2. Enter new email address.
3. Retype new email address to confirm.

<table>
<thead>
<tr>
<th>Account Profile - Email Address</th>
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</thead>
<tbody>
<tr>
<td>Enter fields below to change email address:</td>
</tr>
<tr>
<td>Old Email Address:</td>
</tr>
<tr>
<td>New Email Address:</td>
</tr>
<tr>
<td>Confirm Email Address:</td>
</tr>
<tr>
<td>Submit</td>
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Help
For more information about Security Health Online, call our Sales Department at 1-800-622-7790.

For Help, click [Contact Us] in the upper left-hand corner.