Client Portal User Guide

Contents

Introduction

This user guide provides instructions for the St. Luke's Health Plan Client Portal. The client portal is available at stlukeshealthplan.org/clients by using your secure user name and password, allowing access to navigate between different resources, based on security profile settings.

The client portal provides users with online access to items important to their plan administration including:

- Enrollment records for the purposes of inquiry, additions, changes, and terminations
- Administrative reports such as census
- View premium invoices
- Information on new programs

Security Roles

Users will only see features based on their security profile settings indicated on the Client Portal Access Form.

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Enrollment

The Enrollment section of the client portal provides access to view or add a new subscriber; and access enrollment related reports.

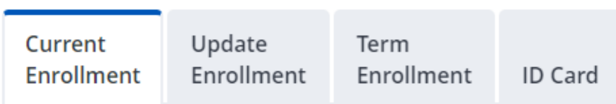
Locate a Subscriber

The Locate a Subscriber tab allows you to view, update, add dependent(s), terminate, and order ID card(s). In order to perform an action, you must first locate the subscriber.

1. To search, select from one of the following field options to locate a subscriber within your organization:
    - First Name and Last Name
    - Date of Birth
    - Social Security Number
    - Member ID

2. Results will be displayed based upon your search criteria. Select the subscriber's name to access their subscriber results page.

3. The subscriber's information will be loaded in a new window with multiple functions



    a. Current Enrollment – subscriber's current plan, effective date, hire date, and benefits
    b. Update Enrollment – modify subscriber's and dependents demographic information, modify benefits, and add dependents
    c. Term Enrollment – terminate a subscriber or a specific dependent
    d. ID Card – order or view ID cards for the subscriber and dependents

Current Enrollment

- View the subscriber's current enrollment including, effective date, and benefits selected
- Select the plus sign which will drop down more information for the subscriber and any dependent(s) enrolled
- View enrollment history for each subscriber or dependent by selecting the History link next to Effective Date

Update Enrollment

Demographic Updates

1. Use the plus sign to expand the current demographics for each member
2. If changes apply to all family members enrolled, select Apply Address Changes to Family that is found when updating the subscriber's demographics
3. After updating the demographic information, select the Update Demographics button to submit your changes and you will receive a confirmation message of your changes

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Benefit Updates

1. Use the plus sign to expand the current benefits of each member
2. Users can update the applicable plan benefits by selecting the benefit election and assigning or reassigning an effective date
3. Dependent benefit elections will be based on the medical plan election of the subscriber. Please update dependents using the coverage options and accept or assign an effective date
4. After updating the benefits with the appropriate effective date for the elected coverage, select the Update Benefits button
    a. If there are any issues processing your request, you may receive an error message with the error highlighted in red. Correct the error and resubmit

Add Dependent

1. Use the Add Dependent tab to an existing subscriber.
2. Note: The subscriber's address will automatically copy to the added dependent, this address field can be updated to be dependent specific
3. Select the medical coverage and effective date of the dependent. The benefit elections will be dependent upon the medical coverage and effective date assigned.
4. Select the Add Dependent button all required fields have been completed
    a. If there are any issues processing your request, you may receive an error message with the error highlighted in red. Correct the error and resubmit.

Reinstate

This option will only be available if there is an option to reinstate a member who had previously termed under the subscriber.

1. Select the green Reinstate link next to the member's name
2. Complete the demographic and benefit information

Term Enrollment

1. Under the Term Enrollment tab, select the enrollee(s) you wish to terminate coverage
2. Provide both a term reason and a term date

Please Note: Any active dependents will automatically term if the subscriber is terminated.

ID Card

- The ID Card tab allows you to order a new ID card for a subscriber, dependent, or the entire family
- You can also view the last ID card issued by selecting "View ID Card"
- Select the individuals you wish to order or view

Add Subscriber

This feature allows you to enroll a new subscriber and their family members.

1. Select Enrollment tab from the left hand navigation
2. Select the second tab titled Add Subscriber
3. Complete the fields for the subscriber demographics such as name, date of birth, and address

4. Select the plan information which must include the group name and benefits effective date
5. Once the plan information is added
6. Once all the information has been filled out for the subscriber, select the Add Subscriber button to enroll the subscriber
7. Following enrollment of a subscriber, you are given an option to add a dependent under the subscriber

Activity Report
Gives access to view a report of enrollment activity for a specific time period. This report may be downloaded into .CVS or Excel.

Other Reports
Users may access reports the following reports:
- Members missing social security numbers
- Members with dual coverage
- Dependent children approaching age 26
- Newborns

New Programs
Descriptions of St. Luke's Health Plan programs.

View Invoices
View current and archived invoices. Invoices will be posted by the 20th of every month.

Please Note: The invoice will only be available to those users who have been granted access.

Pay Invoice
Select Pay Invoice to pay your monthly premium.

Census Reports
The census reporting tool allows a user to select or enter a date to capture enrollment based on the date selected. This report may be downloaded into .CVS or Excel.