

EMPLOYER

Quick Start Guide



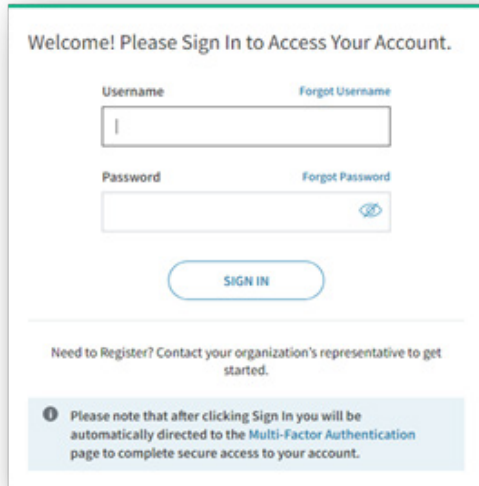
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ACCESS THE EMPLOYER PORTAL

Log in to the CDPHP Employer Portal at employer.cdphp.com/login.

Multi-factor authentication is required.



Welcome! Please Sign In to Access Your Account.

Username [Forgot Username](#)

Password [Forgot Password](#)

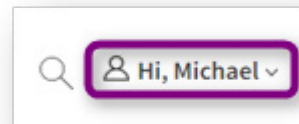
[SIGN IN](#)

Need to Register? Contact your organization's representative to get started.

ⓘ Please note that after clicking Sign In you will be automatically directed to the Multi-Factor Authentication page to complete secure access to your account.

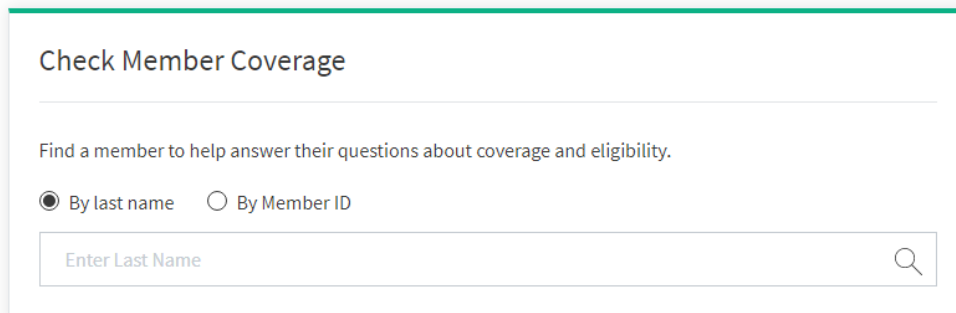
HELPFUL HINTS

- ✓ Multi-factor authentication methods can be managed from User Profile



CHECK MEMBER COVERAGE

To quickly access member information, enter the member's name or ID number.



Check Member Coverage

Find a member to help answer their questions about coverage and eligibility.

☒ By last name ☐ By Member ID

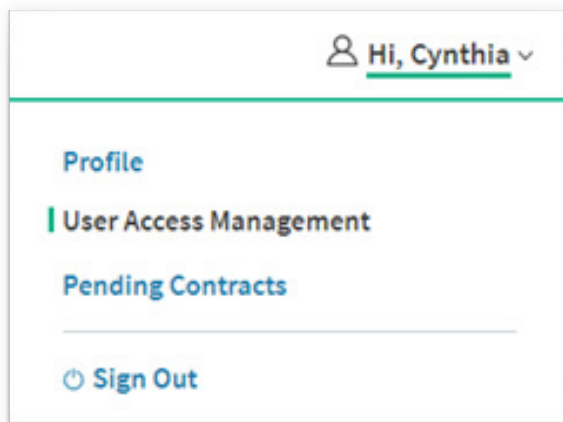
Enter Last Name

USER ACCESS MANAGEMENT

Each employer group will have an Account Admin assigned who will be responsible for the following on the employer portal:


- » Semi-annual portal recertification process
- » Adding new portal users
- » Modifying or removing existing portal user access
- » Assigning DocuSign access for contract signatures

Account Admins can access User Access Management by clicking on your name and selecting **User Access Management**.



VIEW PENDING CONTRACTS

The View Groups with Pending Contracts alert will appear whenever your group has a contract posted to the employer portal that requires signature. DocuSign access must be assigned by the Account Admin to complete electronic contract signature.

 Group(s) require a contract signature to guarantee coverage.

[View Groups with Pending Contracts](#)

BILLING

Select the **Billing** tab to view the **Current Balance and Invoice**, previous billing activity, current invoice plan summary, and more.

HELPFUL HINTS

- ✓ View and Export to Excel a comprehensive list of subscribers from the current invoice.
- ✓ Check the **Contact** tab to ensure the current Group Contact Information is correct.
- ✓ Use the dropdown arrows in the **All Activity** tab to expand the information for each row.
- ✓ Search the Current Invoice by subscriber to view billing information for a specific member.

Subscribers: Current Invoice

☒ By Last Name ☐ By Subscriber ID

Enter Last Name

All Subscribers (1)

This information is available for export until the next invoice is generated. [Export to Excel](#)

SUBSCRIBER NAME	SUBGROUP	COVERAGE	PLAN TIER	PAYMENT TYPE	PLAN	COST
Mogli Kalle CD123456789	Active	Jun 1, 2021	Subscriber Only	Regular	EPO Copay First Ind 425 Silver... Pediatric Dental (no BP)	\$553.83 \$16.46 Total: \$570.29

PAY CURRENT INVOICE

To pay a bill, click on **Pay Bill** from the Billing Overview.

Overview All Activity Contact

Latest Invoice: #211390040325

Overdue

Overdue Amount: \$1,710.87
Current Period: Jun 1, 2021
Due Date: Jun 1, 2021

Current Balance
\$1,710.87

[PAY BILL](#)

Need Help? [Contact us](#)

ACCESS REPORTS & DOCUMENTS

Select **Reports & Documents** tab to access reports, contracts, and documents you may need to learn more and make decisions about your plan.

VIEW ID CARD

To access a member's ID card, search for the member under **Check Member Coverage**. Click on the subscriber's name, then on the Member Information page click **View ID Card**.

The screenshot shows the 'Check Member Coverage' section of a web application. It includes a search bar with the text 'Enter Last Name' and a magnifying glass icon. Below the search bar, there are radio buttons for 'By last name' (selected) and 'By Member ID'. A table titled 'All Members (1)' displays member information. The table has columns for 'MEMBERS NAME', 'MEMBER ID', 'STATUS', and 'ACTIVE DATE'. The first row shows 'Subscriber Mogli Kalle' (highlighted with a red box), 'CD123456789', 'Active' (with a green dot), and 'Apr 1, 2021'. To the right of the table, there is a 'View ID Card' button with a document icon.

MEMBERS NAME	MEMBER ID	STATUS	ACTIVE DATE
Subscriber Mogli Kalle	CD123456789	Active	Apr 1, 2021

ACCESS MANAGE ENROLLMENT

Access Manage Enrollment to process enrollment updates including adding new subscribers, updating existing enrollment, updating a member's personal information, and terminating contracts.

Manage Enrollment can be accessed by clicking **Manage Enrollment** on the home page.

MANAGE ENROLLMENT 

ADD A NEW SUBSCRIBER

Add a new subscriber by clicking on **Add a Subscriber** from the group details page.

Manage Enrollment > Bob's Tire Shop, LLC

Group Details: Bob's Tire Shop, LLC

Your Agency: N/A Your Broker Code: N/A

Group: Bob's Tire Shop, LLC	Group ID: 40023638	Type: Small	Renewal Date: 07/01/2022
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[Add a Subscriber](#) | [View Member Roster](#) | [Upload Census](#)

Complete the guided workflow including reason for enrollment, subscriber information, plan selection, and dependent enrollment, then **Submit**.

HELPFUL HINTS

- ✓ Use the **Search for Provider** feature to locate Provider ID (if applicable).
- ✓ Download a PDF of the Transaction Summary from the Enrollment Submitted confirmation page.

UPDATE ENROLLMENT

Make changes to a member due to a qualifying event using Update Enrollment. This includes plan changes and adding or removing dependents.

Locate the member using **View Member Roster**, then **View Member** and select **Update Enrollment**.

Manage Enrollment > Bob's Tire Shop, LLC > Bob Jones

Member Details

Member ID: CD234567890	Group: Bob's Tire Shop, LLC	Group ID: 40023638	Subgroup: Active	Class Name: Employees
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[Update Enrollment](#) | [Update PCP](#) | [Update Personal Information](#) | [Terminate Contract](#)

HELPFUL HINTS

- ✓ Add new dependents on the Dependent Information step, then enroll them into coverage on the Enroll Dependent(s) step.
- ✓ Remove existing dependents from coverage on the Enroll Dependent(s) step.
- ✓ Download a PDF of the Transaction Summary from the Enrollment Submitted confirmation page.

UPDATE PERSONAL INFORMATION

Update a member's personal information using **Update Personal Information**.

Locate the member using **View Member Roster**, then **View Member** and select **Update Personal Information**.

The screenshot shows the 'Member Details' page for Bob Jones. The breadcrumb trail is 'Manage Enrollment > Bob's Tire Shop, LLC > Bob Jones'. The page displays member information: Member ID: CD234567890, Group: Bob's Tire Shop, LLC, Group ID: 40023638, and Subgroup. Below this is a row of buttons: 'Update Enrollment', 'Update PCP', 'Update Personal Information' (highlighted with a red box), and 'Terminate Contract'. A modal window titled 'Spouse' is open, showing the name 'Mary Jones' and date of birth '02/16/1980'. It also has a red box around its 'Update Personal Information' button and an 'Update PCP' link.

HELPFUL HINTS

- ✓ Update personal information for a dependent by locating the dependent on the Member Details page and selecting Update Personal Information.
- ✓ Download a PDF of the Transaction Summary from the Member Update Submitted confirmation page.

TERMINATE CONTRACT

Terminate all benefits for a subscriber and enrolled dependent(s) using Terminate Contract.

Locate the member using **View Member Roster**, then **View Member** and select **Terminate Contract**.

The screenshot shows the 'Member Details' page for Bob Jones. The breadcrumb trail is 'Manage Enrollment > Bob's Tire Shop, LLC > Bob Jones'. The page displays member information: Member ID: CD234567890, Group: Bob's Tire Shop, LLC, Group ID: 40023638, Subgroup: Active, and Class Name: Employees. Below this is a row of buttons: 'Update Enrollment', 'Update PCP', 'Update Personal Information', and 'Terminate Contract' (highlighted with a red box).

HELPFUL HINTS

- ✓ Terminate Contract will terminate all benefits for the subscriber/dependent(s). To terminate a single benefit for the member, use Update Enrollment.
- ✓ Download a PDF of the Transaction Summary from the Termination Submitted confirmation page.

REINSTATE A SUBSCRIBER

Reinstate a terminated subscriber using Reinstate Member.

Locate the terminated member using View Member Roster, then **View Member** and select **Reinstate Member**.

Manage Enrollment > Bob's Tire Shop, LLC > Matthew James

Member Details

Member ID: CD456789012	Group: Bob's Tire Shop, LLC	Group ID: 40023638	Subgroup: Active	Class Name: Employees
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Reinstate Member Update Personal Information

HELPFUL HINTS

- ✓ Add new dependents on the Dependent Information step, then enroll them into coverage on the Enroll Dependent(s) step.
- ✓ Decline coverage for existing dependents that are not being reinstated on the Enroll Dependent(s) step.
- ✓ Download a PDF of the Transaction Summary from the Termination Submitted confirmation page.

INCOMPLETE PROCESSES

Processes that have been started but not completed are automatically saved as Incomplete (Action Required). This includes any type of enrollment transaction – Add Subscriber, Update Enrollment, Update Personal Information, Terminate Contract, and Update PCP.

Locate any incomplete processes under **Incomplete (Action Required)** on the **Group Details** page.

Incomplete (Action Required)

Search for Process

PROCESS NAME	LAST SAVED	USER	ACTION
Update Enrollment_Bob Jones	Jun 16, 2021 10:55 AM	Chelsea Kane	<div>Resume</div> <div>Delete</div>

Number of rows

