wellstarhealthplan.org

Broker & Client User Guide

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About This Guide

This guide provides an overview of the Client Portal and outlines how to locate members, access member information, manage enrollments, and review reports.

The Client Portal enables authorized users to:

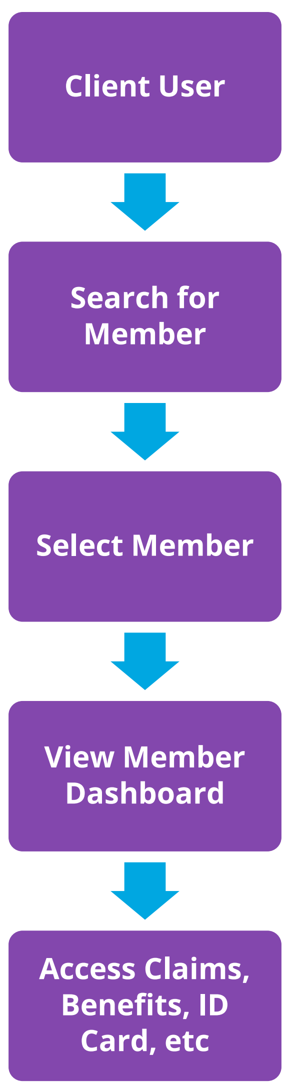
- Locate members
- Access claim and coverage information
- Manage enrollment updates (if permitted)
- Access reporting tools

Access to portal features and member data is based on assigned permissions.

How Client Access Works

Client users begin by locating a member using the member search function.

Once a member is located, the portal transitions into member-level view, where available claim, coverage, and ID card information can be accessed based on assigned permissions.



System Access & Login

Access to the Client Portal is limited to authorized users. Each user is assigned unique login credentials.

To access the system:

1. Navigate to the Client Portal login page.
2. Enter username and password.
3. Select the appropriate account (if applicable).
4. Select **Log In**.

For security:

- Do not share login credentials
- Log out after each session
- Contact your client manager if access issues occur

User Roles & Permissions Overview

Access within the Client Portal is permission-based.

Assigned roles determine visibility and available actions, including:

- Member search
- Enrollment management
- Reporting tools
- Administrative configuration

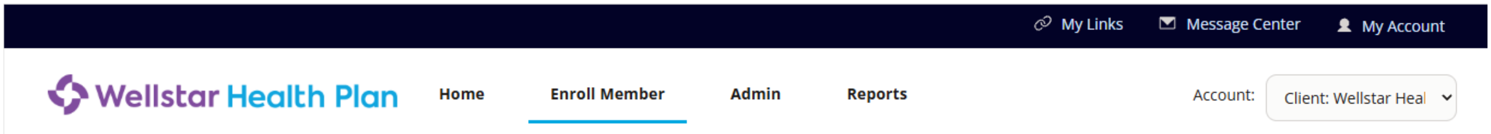
Features not enabled for a role will not be visible.

Contact your client manager to request additional access.

Navigation & Global Features

The Client Portal navigation provides access to member search, enrollment tools, reports, and administrative features.

Navigation options vary based on assigned permissions.



Top Navigation Menu

The top navigation menu appears across all portal pages and provides access to primary functions.

Available options may include:

- **Home** – Returns to the Client Dashboard
- **Enroll Member** – Initiate new enrollment
- **Admin** – Access administrative tools
- **Reports** – Access reporting tools

Select a navigation option to move between sections.

Account Selection

If you have access to multiple client accounts, use the **Account** dropdown in the upper-right corner to switch between accounts.

Changing the selected account updates the data displayed throughout the portal.

Utility Links

Utility links appear in the upper-right corner and remain accessible across pages.

Available links may include:

- **My Links** – Configured resource shortcuts
- **Message Center** – Secure communication
- **My Account** – Profile management

Availability is based on assigned permissions.

My Links

The **My Links** section provides quick access to commonly used tools, external systems, or client-specific resources.

Links displayed in this area may vary based on:

- Client configuration
- Assigned permissions
- Integrated reporting tools

Selecting a link may:

- Open a new browser window
- Launch an external reporting platform
- Direct you to an internal system tool

If a link is unavailable or does not function as expected, contact your client manager.

Message Center

The Message Center supports secure communication between client users and support teams.

Available actions include:

- View submitted inquiries
- Respond to correspondence
- Send new secure messages
- Attach documentation (if permitted)

Messages are stored securely within the portal.

Sending a New Message

1. Select **Message Center**.
2. Select **New Message**.
3. Select a topic.
4. Enter subject and message details.
5. Attach documentation if needed.
6. Select **Submit**.

Messages are routed to the appropriate department.

My Account

The **My Account** section allows users to manage their personal login information.

Depending on permissions, this area may allow you to:

- Update contact information
- Change password
- Review account settings

For security purposes:

- Password updates should follow company policy.
- Do not share login credentials.

If you are unable to modify account settings, contact your client manager.

System Notifications & Banners

System notifications and informational banners may appear throughout the portal.

These notifications may be used to:

- Highlight important benefit updates
- Display system alerts
- Provide reminders
- Communicate time-sensitive information

Banners may appear on:

- The Dashboard
- Member screens
- Enrollment pages

Some notifications are informational only and do not require action.

Client Dashboard (Home)

The Client Dashboard is the landing page after login and provides access to core administrative functions.

From the Dashboard:

- Locate members
- Initiate enrollment (if permitted)
- Access reports
- Access administrative tools

The Dashboard centralizes commonly used portal actions.

Member Search Area

The Member Search area appears on the Dashboard and allows you to enter search criteria to locate a specific plan participant.

Detailed instructions for searching and accessing a member record are provided in the **Finding a Member** section.

Enrollment Access

If your role includes enrollment permissions, you will see an **Enroll** button on the Dashboard. Selecting **Enroll** opens the New Member Enrollment workflow.

Enrollment functionality varies based on assigned permissions and account configuration.

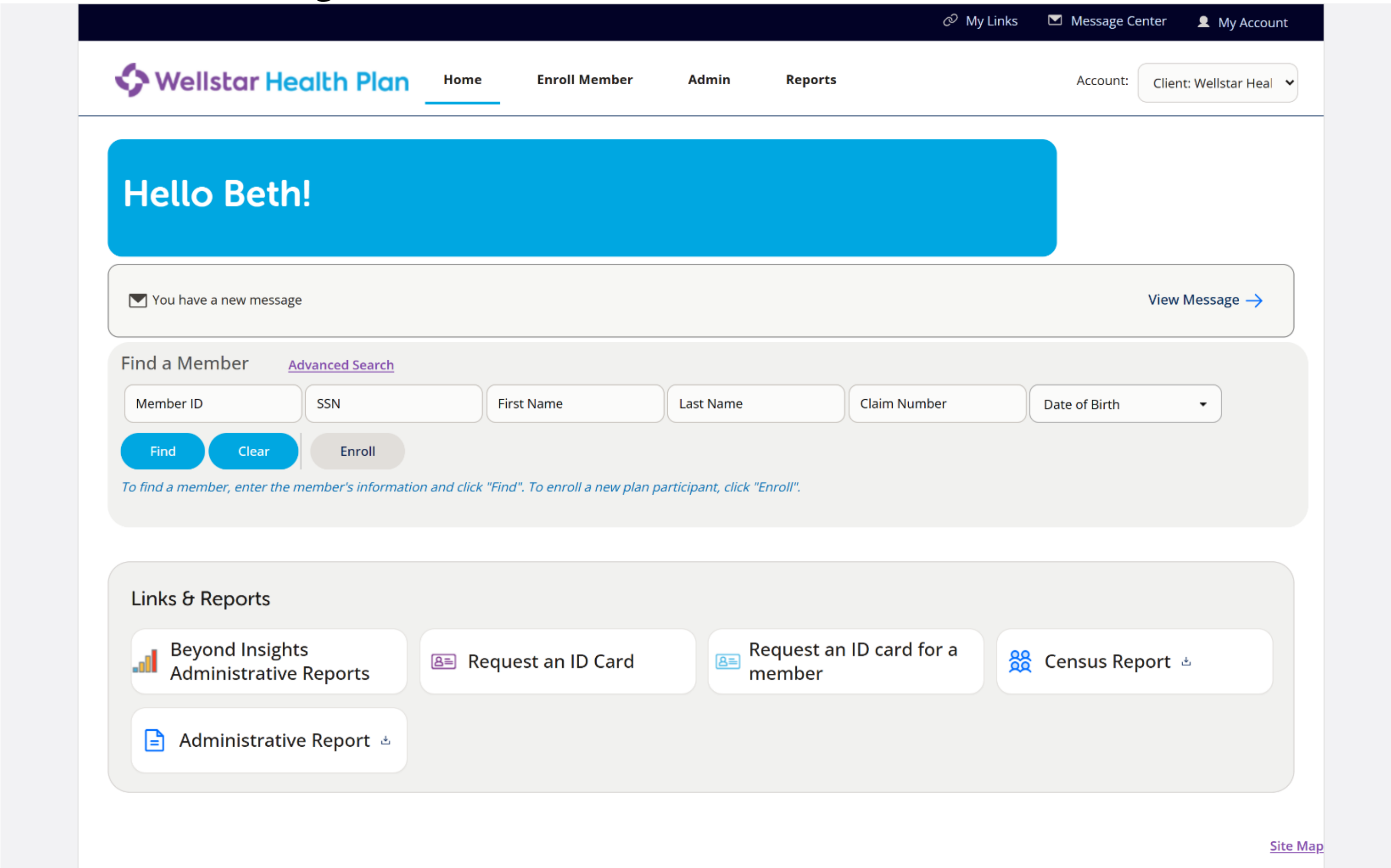
Quick Access Tools

Depending on your permissions, the Dashboard may display quick-access links or tiles for:

- Administrative tools
- Reporting features
- Analytical reports

These links provide shortcuts to commonly used portal functions.

Client Dashboard Page



Finding a Member

Client users locate members using the search function on the Dashboard.

Basic Search

Step 1: Enter Search Criteria

1. Enter one or more search criteria:
    a. Member ID
    b. Social Security Number (SSN)
    c. First Name
    d. Last Name
    e. Claim Number
    f. Date of Birth
2. Select **Find**.

Select **Advanced Search** for additional filtering options.

Step 2: Review Search Results

Search results display:

- Member ID
- Masked SSN
- Member Name
- Account or location information

Select:

- **View Member Dashboard**
- **View Member Details**

Availability is based on assigned permissions.

Step 3: Access the Member Record

From the search results, you may select:

- **View Member Dashboard** – Opens the member's dashboard view
- **View Member Details** – Opens the member's detailed profile

Availability of options depends on your assigned permissions.

Additional Member Actions (Options Menu)

After locating a member, you may see an **Options menu** (three vertical dots) next to the member record.

This menu provides quick access to additional member-level functions.

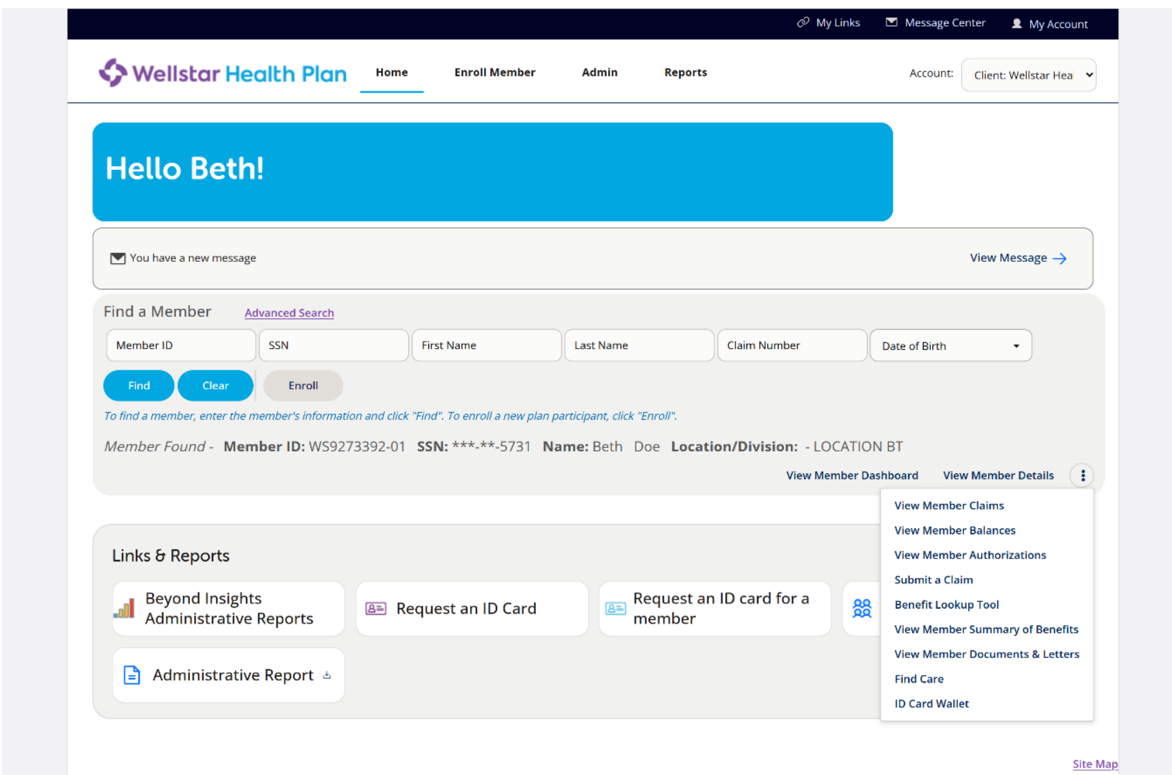
Options may include:

- View Member Claims
- View Member Balances
- Submit a Claim
- Benefit Lookup Tool
- View Member Summary of Benefits
- View Member Documents & Letters
- Find Care
- ID Card Wallet

Available options vary based on assigned permissions.

Permission-Based Access
Member search results and available actions are role-based.

You may not see all options described in this guide if they are not included in your assigned access level.



Selecting an option from this menu will take you directly to the corresponding member-level page.

Viewing Member Dashboard

The Member Dashboard provides a consolidated view of member claims, balances, coverage, and related information.

A notification banner confirms when operating within member-level view.

Access to features is based on assigned permissions.

Entering Member View

When you select View Member Dashboard, the portal transitions into a member-level view.
A notification banner appears at the top of the screen indicating that you are viewing a specific member's dashboard.

This banner confirms you are operating within the selected member's record.

Available Member Information

From the Member Dashboard, you may be able to view:

- Recent Claims
- Claim Details
- Deductible and Out-of-Pocket Balances
- Plan Information
- ID Card Information
- Member Documents
- Links to provider search tools

The information displayed reflects what is available to the member and may vary based on your assigned permissions.

Accessing Member-Level Pages

While viewing a member's dashboard, you may access additional member-level pages using:

- The top navigation menu
- The Options (three-dot) menu
- Links available within the dashboard
- Client users may access the same core pages available to members, including:
- Claims & Expenses
- Summary of Benefits
- Documents & Letters
- ID Card Wallet
- Message Center

These pages display the same information visible to the member, subject to your assigned permissions.

For detailed explanations of page content and functionality, refer to the **Member Portal Guide**.

Exiting Member View

To return to the Client Dashboard, select Exit View (if available).
Exiting Member View ensures you are no longer operating within a specific member's record.

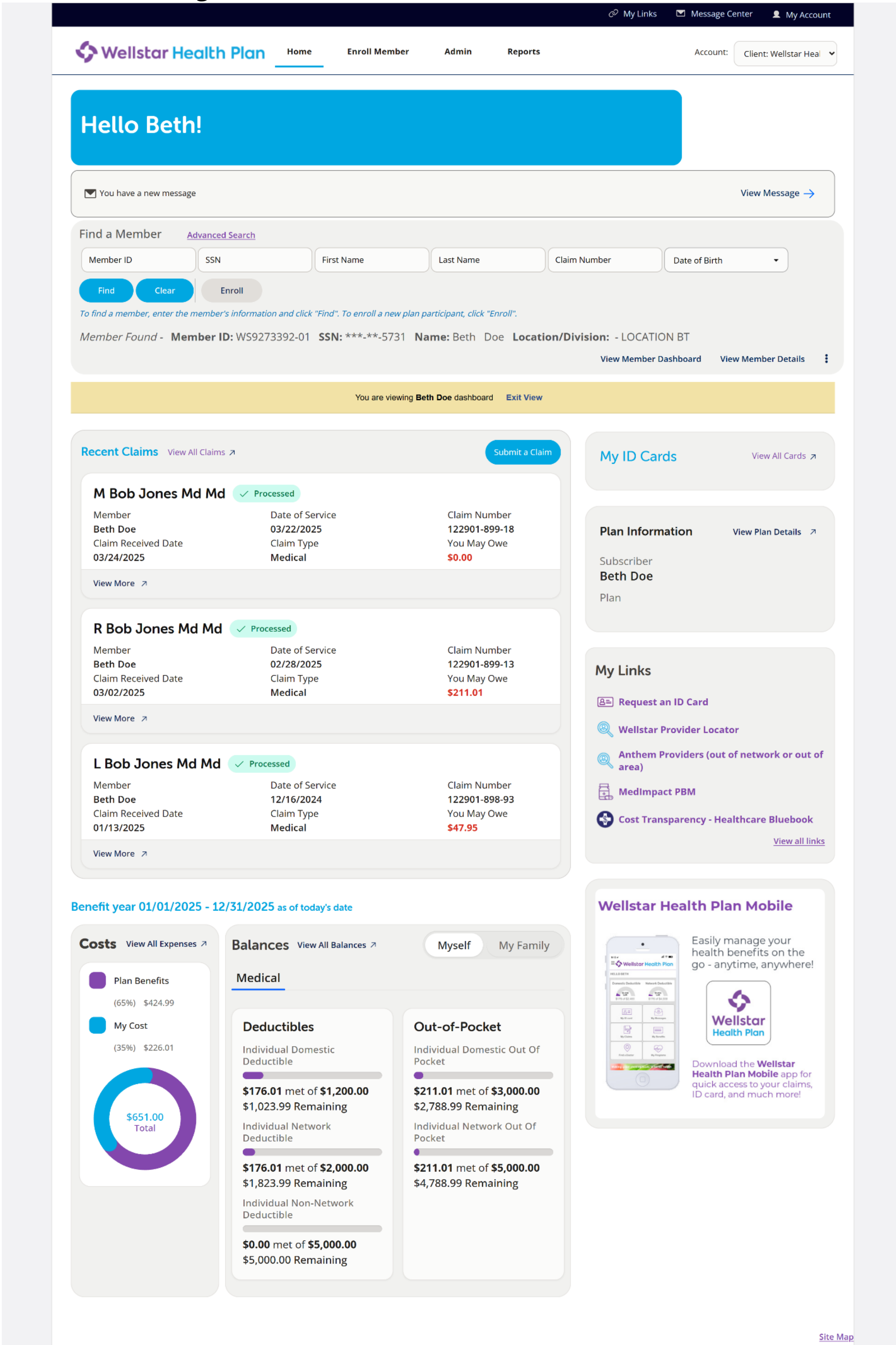
Always confirm you have exited Member View before beginning a new search.

Important Considerations

- Actions performed within Member View apply only to the selected member.
- Information displayed reflects data available to the member.
- Editing capabilities, if available, are permission-based.

If you are unsure whether you are viewing a member record, refer to the notification banner at the top of the screen.

Member Dashboard Page



Enrollment & Member Record Updates

New Member Enrollment

Client users with appropriate permissions may initiate new enrollments or update existing member records.

Access to enrollment functionality is role-based.

Starting a New Enrollment

To initiate enrollment:

1. Select **Enroll** from the Dashboard.
2. Enter required member information.
3. Complete coverage selection.
4. Select **Next**.
5. Review entries.
6. Submit enrollment.

A confirmation message displays upon submission.

Personal Information

The **Personal Information** section captures identifying details for the new member.

Required fields may include:

- First Name
- Last Name
- Date of Birth
- Social Security Number
- Gender
- Address
- Contact Information
- Employment Information

Select **Add/Modify** after entering required information.
If this section is expanded, it must be completed or closed before continuing.

Preferred Communication Details

You may enter:

- Email address
- Mobile phone number
- Alternate phone number

Communication preferences determine how the member receives notifications, including Explanation of Benefits (EOB) communications.

Coverage Selection

After adding the member's personal information, proceed to the **Coverage** section.

Here you will:

- Select the appropriate Action
- Enter an Effective Date
- Select Location/Division
- Choose Benefit Plan
- Select Network

Required fields are marked with an asterisk (*).

Completing Enrollment

After all required information is entered:

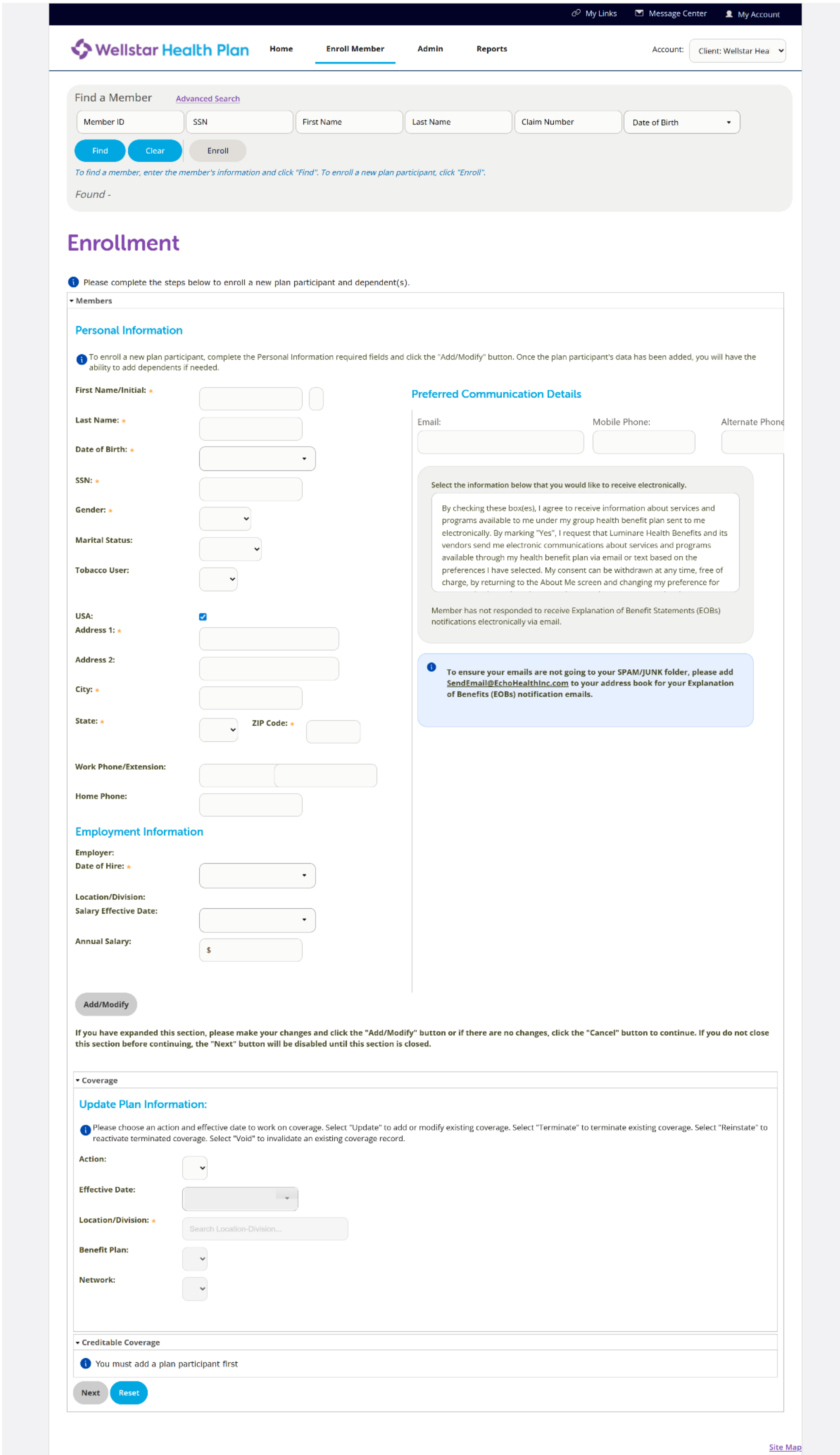
1. Select **Next** to continue.
2. Review all information carefully.
3. Submit the enrollment.

Enrollment confirmation will display upon successful submission.

Important Considerations

- Effective dates must align with plan rules.
- Required fields must be completed before submission.
- Enrollment capabilities are permission-based.
- Submitted enrollments may require validation before becoming active.

New Member Enrollment Page



Updating an Existing Member Record

Client users may update enrollment and coverage directly within a member record.

Available actions include:

- Add or remove dependents
- Modify coverage
- Terminate coverage
- Reinstate coverage

Access is role-based.

Accessing the Enrollment Page

To update a member's enrollment:

1. Locate the member using the **Find a Member** function.
2. Select **Enroll Member** from the top navigation.
3. The system will display the current member record and coverage details.

You will be working within the selected member's record.

Members Section

The **Members** section displays:

- Member ID
- Member Name
- Relationship
- Date of Birth

From this section, you may:

- Add a dependent
- Review existing dependents
- Remove a dependent (if permitted)

Dependent eligibility is subject to plan rules.

Coverage Section

The **Coverage** section displays the member's current plan information.

This includes:

- Location/Division
- Benefit Plan
- Network
- Primary Care Physician (if applicable)

Coverage shown may be future-dated depending on enrollment timing.

Updating Plan Information

To modify coverage, select an action from the **Action** dropdown menu.

Available actions may include:

- Update – Modify existing coverage
- Terminate – End current coverage
- Reinstate – Reactivate terminated coverage
- Void – Invalidate an existing coverage record

After selecting an action:

1. Enter the appropriate **Effective Date**.
2. Update required plan fields.
3. Select **Next** to continue.

Required fields are marked with an asterisk (*).

Effective Dates

Effective dates must align with eligibility rules and plan configuration.
Incorrect dates may delay processing.
Confirm dates before submission.

Finalizing Changes

Before submitting changes:

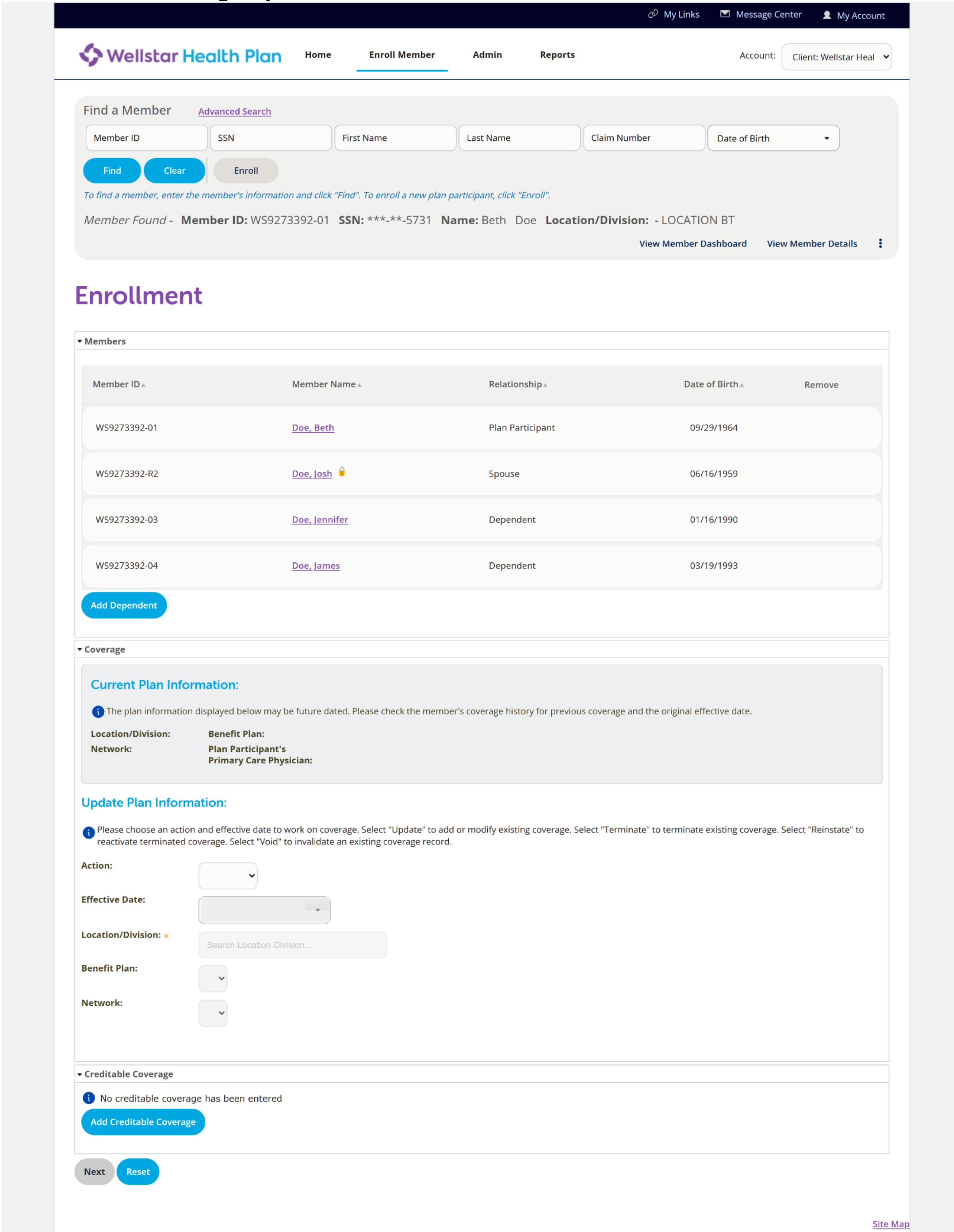
- Review all entered information
- Confirm plan selections
- Verify dependent information

Select **Next** to proceed through the workflow until confirmation is displayed.

Important Considerations

- Enrollment updates may require validation before becoming active.
- Changes are subject to eligibility rules and plan configuration.
- Editing capabilities vary based on assigned permissions.

Enrollment & Coverage Update



Reports

The Reports section provides access to administrative and analytical reporting tools.

Report visibility and export capabilities are based on assigned permissions.

Accessing Reports

1. Select **Reports** from the top navigation.
2. Select the desired report.
3. Apply filters if required.
4. Generate or export the report.

Report availability may vary by client configuration.

Important Considerations

- Report availability is based on assigned user permissions.
- Some reports may be restricted to administrative users.
- Data visibility may be limited by location, division, or client structure.