Employer Dashboard User Guide

MEDICAL MUTUAL®

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MedMutual.com

Dear Medical Mutual Customer,
Welcome to our new Group Admin tool, the MedMutual Employer Dashboard (https://employer.medmutual.com)! Before we give you a full tutorial on the new website, we'd like to help you get access to your account.

Before you start, **you need to receive an invite to use MED**. If you did not receive an invite, **do not** try and log in. You won't be able to create an account or use your EmployerLink account on MED. You can only join MED (currently) through an invite.

The invite should be in your inbox from medmutual@info.medmutual.com.

If you did not get an invite, you will fill out one of two forms:

- Non-Brokers Form: In this form, you assign a Group Admin for your Group on MED, who can then add other users. Only assign one Group Admin per group.
- Broker Form: In this form, brokers can (in bulk) request access to all their Groups on MED.

Please note: it will take 5 to 10 business days to gain access once the form has been completed.

If you don't receive your invite after 10 business days, it is possible the email went to spam or was lost. After 10 business days, if no email arrives, select the "REGISTER" button on MED (https://employer.medmutual.com). If that doesn't work, please email employerdashboardowner@medmutual.com.

If you have any issues outside of logging in, you will want to head to "CONTACT US" on MED. From there, we will point you to the best team member to speak with.

General help options are listed below in case "CONTACT US" on MED is not an option.

If you have a payment or enrollment issue, you will want to reach out to your Membership representative.

Best,
MedMutual Employer Dashboard Team

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Overview

There are three types of external administrators who can view and access a group's health benefit plan according to the permissions that were assigned to them on the MedMutual Employer Dashboard (MED).

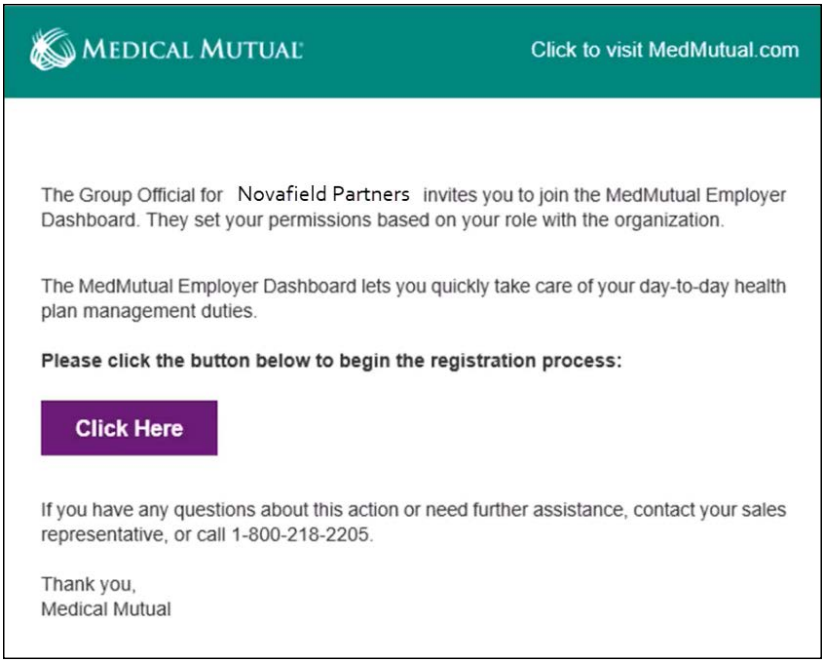
1. **Group Administrator** - This is the primary group administrator who is invited to use MED. The Group Administrator can access every piece of information in the group and can invite and designate other administrators and brokers as needed. ***Each group must have a designated Group Administrator.***
2. **Administrator** - This is a secondary administrator who has been invited to use MED by the Group Administrator. They will usually have less overall rights but can be designated as the Group Administrator in the event of an organizational change.
3. **Broker** - The broker is external to the member organization and must also be invited by the Group Administrator. Like the administrator, they can be assigned access to modify the appropriate information by the Group Administrator. ***A broker can never be designated as the primary Group Administrator.***

Signing In

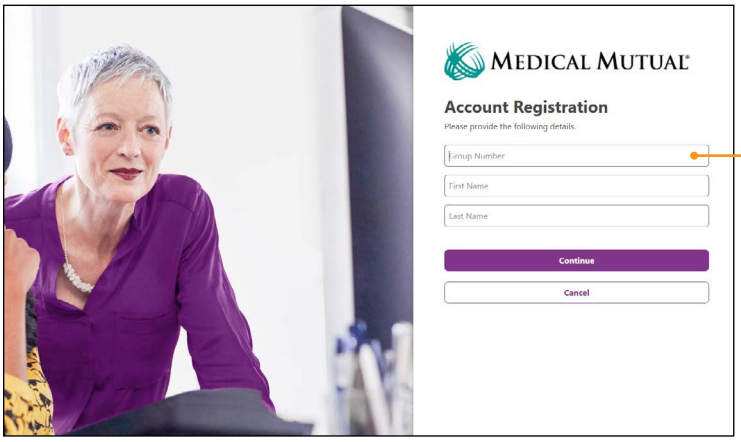
External users must be invited to create an account by a Medical Mutual Administrator or by the primary Group Administrator who already created an account. When logging in for the first time, external users are directed through the following registration process.

STEPS

1. Review the invitation email and click the button to open the MED page on a browser tab.

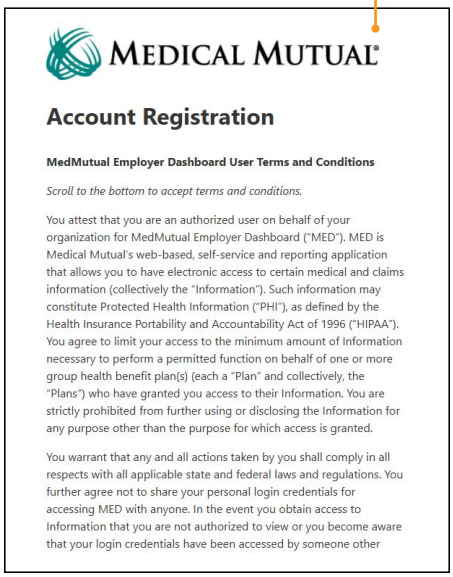


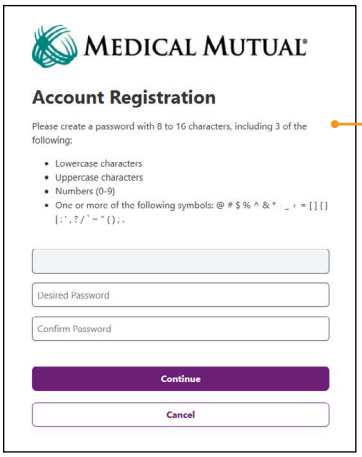
2. Next, the user will be guided through a registration process to set up their secure account.



a. Enter the Group Number and the user's first and last name.

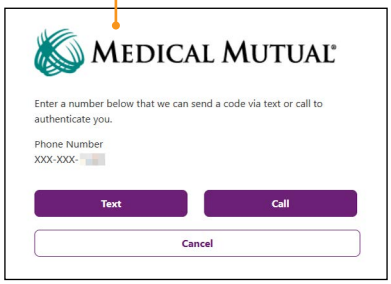
b. Review the user terms and conditions.





c. Establish and confirm a password.

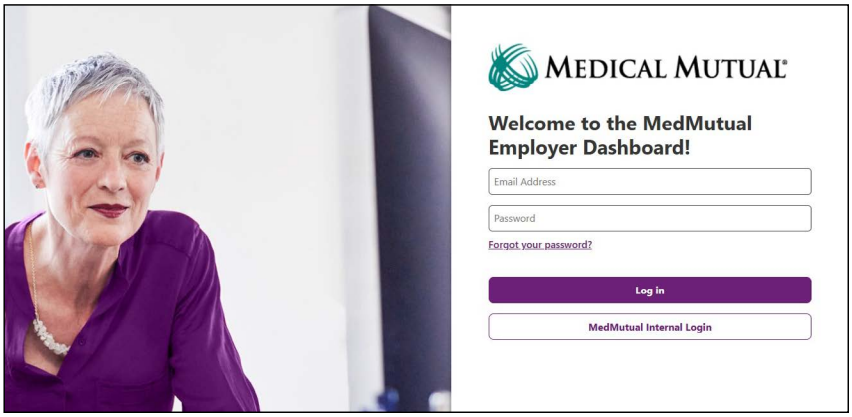
d. Set up Multi-Factor Authentication.





e. Enter verification code.

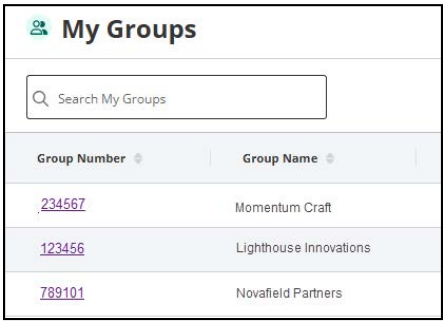
3. Users will log in to the MED platform using their newly established credentials. This will open the landing page based on their role and administrative duties.



User Landing Page

Overview

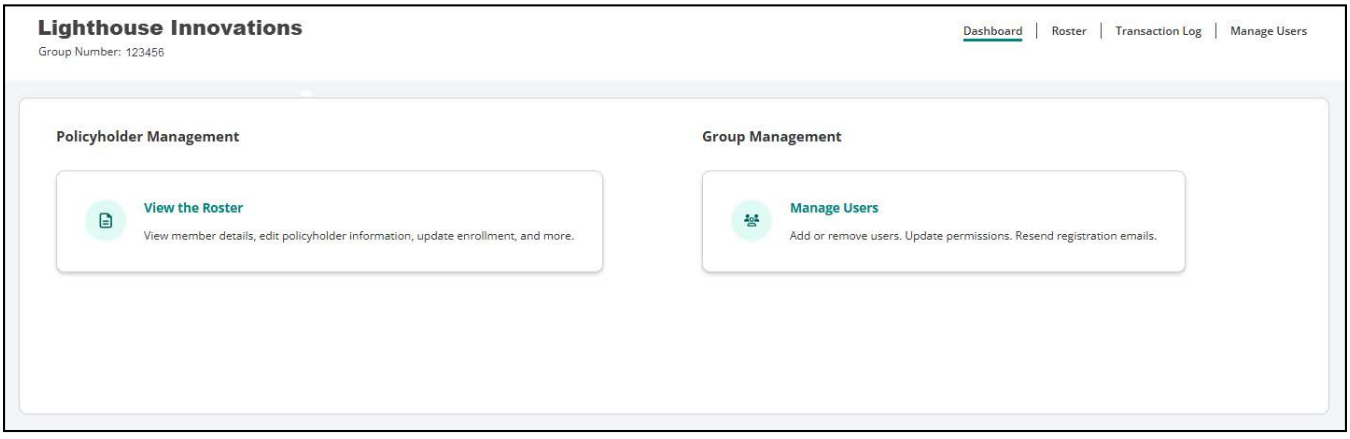
After logging in, the user will land on either the My Groups or Group Dashboard page. Users that are assigned to multiple groups should click the Group Number to open the Group Dashboard.



Group Number
Opens the Group Dashboard where the group administrator can manage the policyholder roster or manage administrator profiles.

Group Dashboard

The Group Dashboard is the main page that group administrators will use to manage the group according to the functions that were assigned to their profiles. The screenshot below depicts an administrator that has access to both the roster and to manage other administrative users.



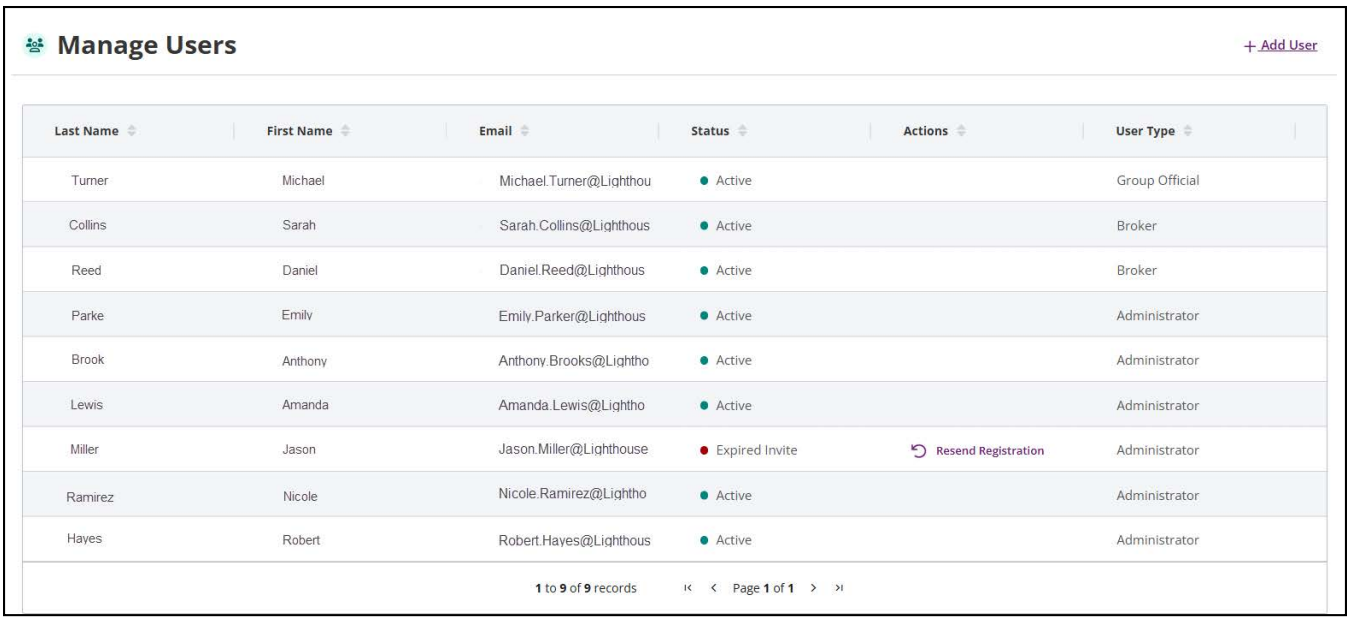
View the Roster	Manage Users	Group Transaction Log
Opens the Roster page to view and manage the roster of policyholders in the group.	Opens the Manage Users page to view and manage the list of group administrators.	Opens the Group Transaction Log to review the comprehensive list of transactions that have taken place across the group.

Managing Users Page

Overview

The Manage Users page allows the Medical Mutual Administrator or external group administrator to manage and edit ***other group administrators***. This page will not be available until at least one Group Administrator has been invited to the group.

External users will typically use this page more than Medical Mutual employees.

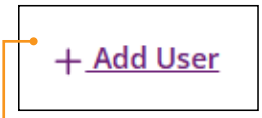


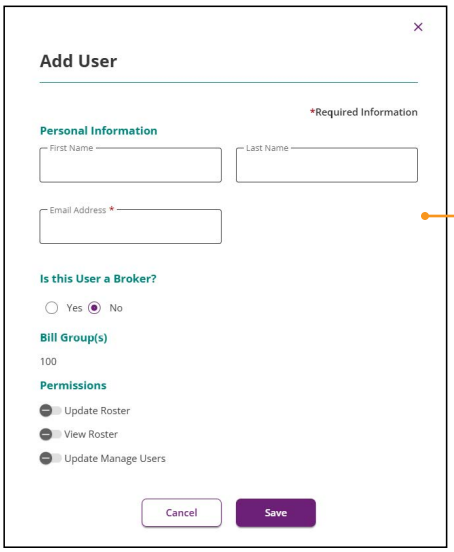
Add User Link	Group Administrators or Medical Mutual Administrators can use this link to add new users who can perform administrative tasks on the group's roster.
Last Name Links	Clicking on the Last Name link will open the Edit User slide out, which the administrator can use to edit the user's permissions.
Actions	Use the links in this column to perform actions specific for the user such as resending a registration email.
User Types	Three types of users are available on this page: ▪ **Group Administrator:** Controls the Group Permissions and adds new administrators or brokers who can work with the roster. ▪ **Administrator:** Works with the roster according to the permissions assigned to them. Can be added as a Group Administrator. ▪ **Broker:** Can view the roster, add users or update Manage Users. Cannot be given the Group Administrator designation.

Add Users

Steps

1. Click the Add User link to open the Add User slide out.





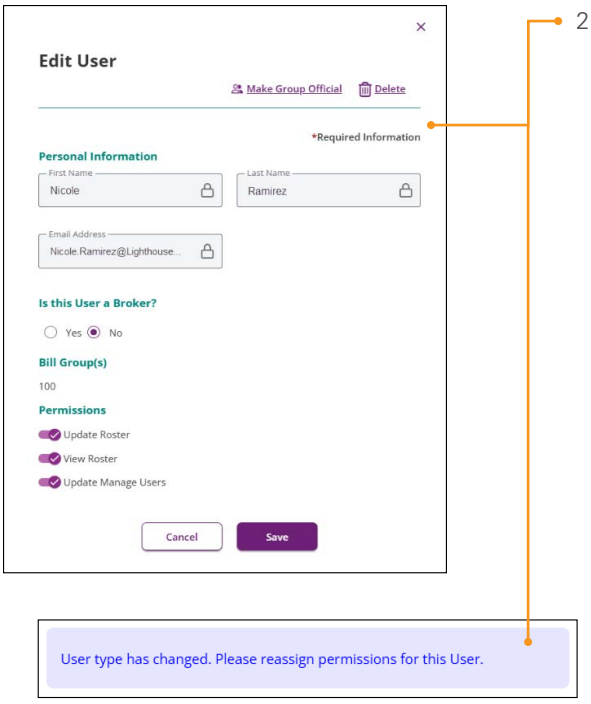
2. Enter the new user's information and assign them permissions.
   a. Enter the new user's Personal Information. An email address is required.
   b. Select whether the user is a Broker. Brokers can be assigned any and all permissions but ***cannot be made a group administrator***.
   c. Assign permissions needed by the user to complete the work.
   d. Click save to complete your changes. This will also send a registration email to the newly added user.

Edit Users

Steps

1. Click the user's last name to open the Edit User slide out.





2. Enter the new user's information.

a. Make the user a Group Administrator.

- Only select the Make Group Administrator option when the existing administrator is no longer in the role and a new administrator needs to be assigned. Selecting this option will give the user full access to the application as defined by Group Permissions.
- Broker profiles will not have the Make Group Administrator option.

b. Delete the User's profile.

- For Group Administrators, the Delete option will only appear when another profile has been designated as the Group Administrator.

c. Select whether the user is a Broker. Changing this option will require permissions to be reassigned.

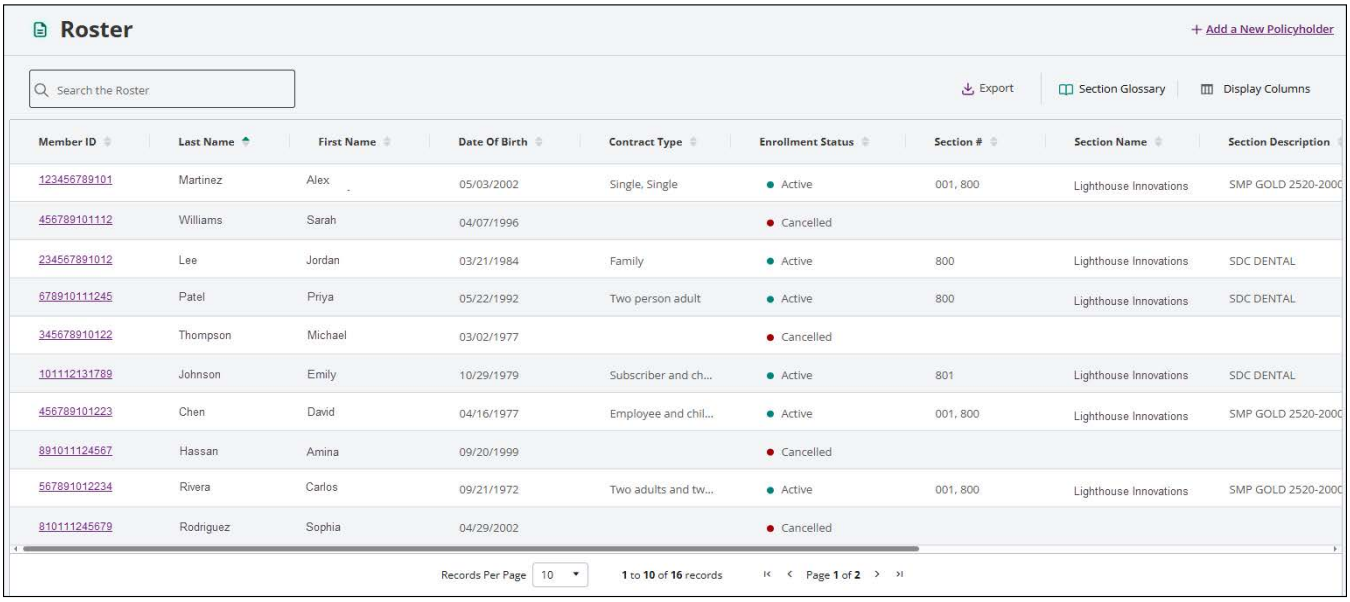
d. Toggle permissions on and off as needed by the user to complete the work.

e. Click **Save** to complete.

Roster Page

Overview

The roster allows users to view and manage members within a group. From the roster, a user can access a policyholder's details by clicking on a Policyholder's ID to be directed to the Policyholder Details page.



Roster Search	Search the roster for a specific member using information such as name, date of birth, enrollment status, etc.
Member ID	Opens a page with detailed policyholder information which can be updated by Admins with the appropriate rights.
Sort	Click the cell to sort the column by alphabetical or numerical order.
Export Roster	Exports roster records as CSV or Excel files.
Section Glossary	Opens a detailed view of the section(s) associated with the group and gives access to the benefit book associated with their insurance plan.
Add a New Policy-holder	Opens the Event workflow to add a new policyholder to the group.
Display Columns	Opens a panel that allows the user to customize their view of the table by selecting, sorting or removing columns of information.
Records Per Page	Opens a drop-down menu for selecting the number of records to display per page (e.g., 10, 25, 50, 100).
Paginate	Pages through the records of members in the group. Clicking the double-arrow symbol will take the user to the first or last page while the single arrows advance one page at a time.

Panels

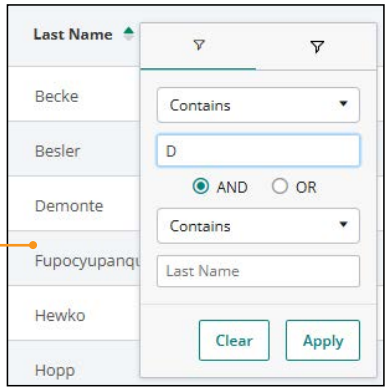
Two buttons on the Roster page will activate pop-out panels for further adjustments.

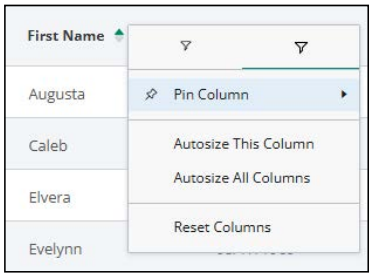
Filter Buttons



The filter button appears when hovering the mouse over a column. When clicked, a panel with two tabs appears.

Filter tab A allows the user to search for values using an AND/OR operator.



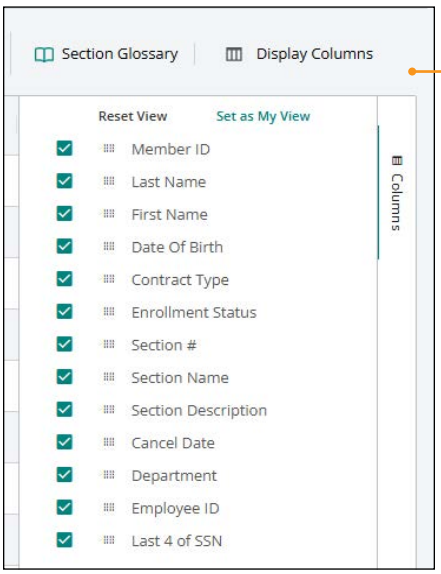


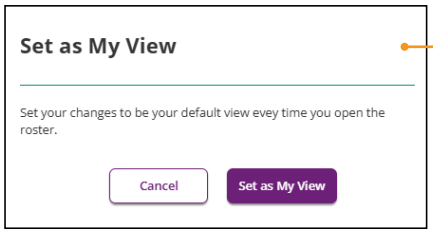
Display Columns

The Display Columns button provides users with a space to customize their view of the columns displayed on the Roster page.

Users can choose to:

1. Rearrange columns (Checkboxes)
2. Remove columns (Handles)



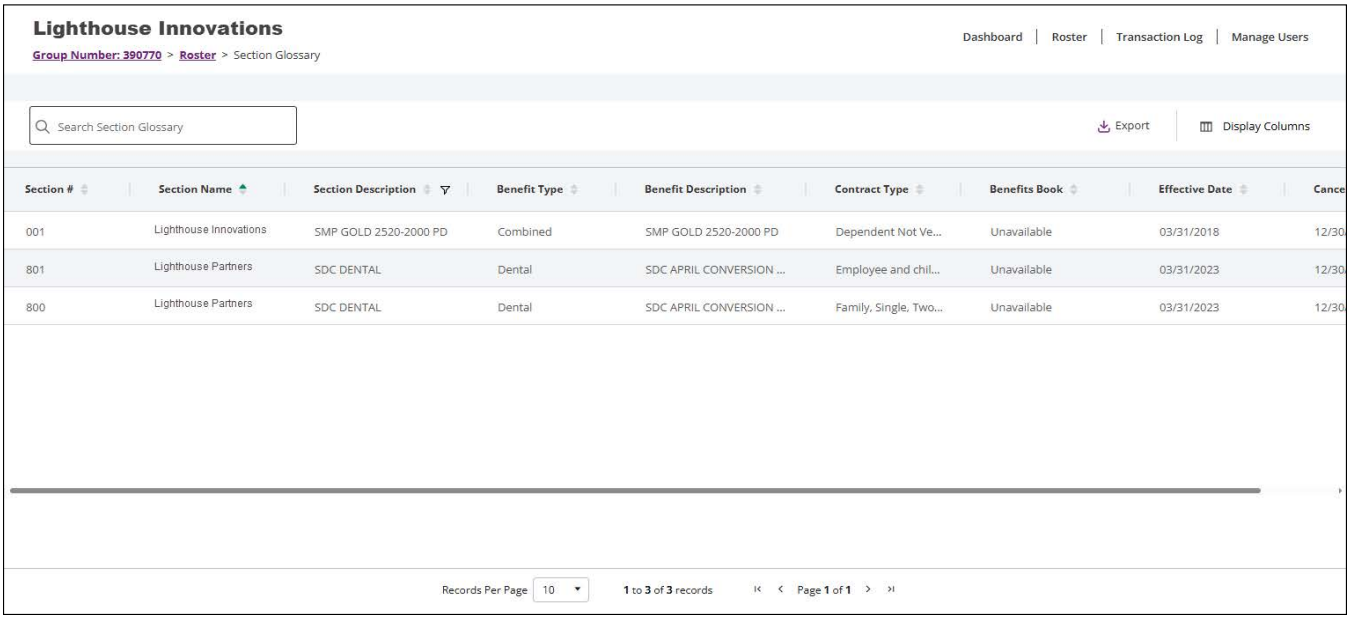


Clicking ***Set as My View*** allows users to set their primary view on the Roster page.

Section Glossary

Overview

The Section Glossary gives users a detailed view of the section(s) associated with their group and gives them access to the benefit book associated with their insurance plan.



Breadcrumbs Header	Allows the user to quickly navigate through the page structure.
Search	Search for a specific section utilizing the search bar.
Section Details	A high-level view of key information for each section, including a section description, benefit types, provider network names, etc.
Sort	Sort the column by alphabetical or numerical order.
Filter	Filter the information or set preferences for specific columns.
View/Download Benefits Book	View the section's benefits book as a PDF and download to personal devices.
Export	Exports search results as a CSV or Excel file.
Display Columns	Opens a panel that allows users to customize their view of the table by selecting, sorting, or removing columns of information.
Records Per Page	Opens a drop-down menu for selecting the number of records to display per page (e.g., 10, 25, 50, 100).
Paginate	Pages through the section records. Clicking the double-arrow symbol will take the user to the first or last page, while the single arrows advance one page at a time.

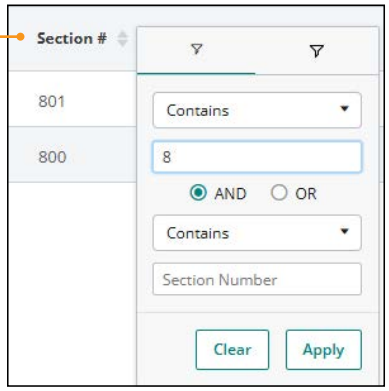
Panels

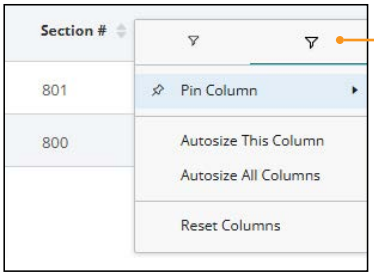
Filter Tabs

The filter button appears when hovering the mouse over a column. When clicked, a panel with two tabs appears.



Filter tab A allows the user to search for values using an AND/OR operator.





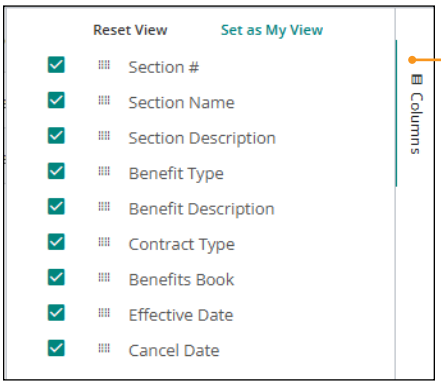
Filter tab B allows the user to set their preferences for the column that they are using.

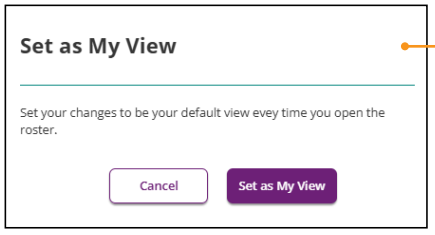
Display Columns

The Display Columns button provides the user with a space to customize their view of the columns displayed on the Roster page.

The user can choose to:

1. Rearrange columns (Checkboxes)
2. Remove columns (Handles)





Clicking ***Set as My View*** allows the user to set their primary view on the Roster page.

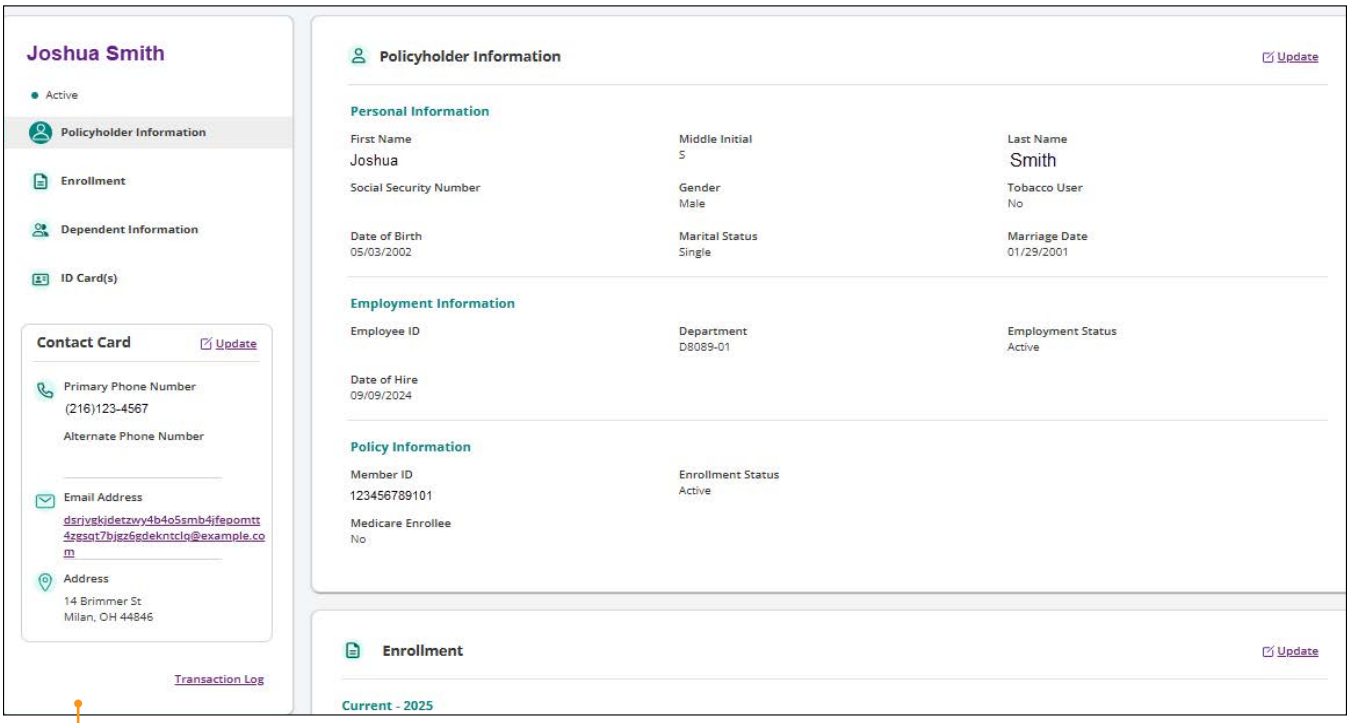
Clicking ***Reset View*** will reset the columns in the table back to their original order.

A pop-out will appear to confirm that the view can be changed.

Policyholder Details Page

Overview

On this page, users can manage and update specific policyholder information.

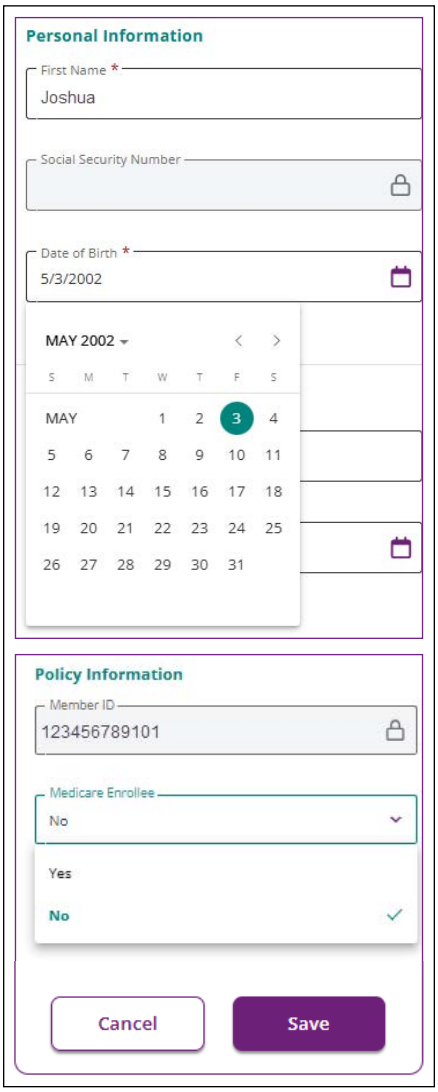


1. **Navigation Menu** - Allows the user to quickly navigate through the page structure.
2. **Contact Card** - View and edit policyholder contact information.
3. **Policyholder Information** - View and edit policyholder information.
4. **Update Links** - Click to open editable text fields for the Policyholder Information and Contact Card sections.
5. **Transaction Log** - Opens the Policyholder Transaction log to track the status of changes made to the policyholder's profile.

Updating Information

- Required fields are indicated with * and must be filled to save changes
- Editable fields appearing in the grayed-out fields cannot be edited
- Select dates or input them manually
- Use drop-downs to select from a list
- Press Cancel to restore original data
- Press Save to save changes

Policyholders and Dependents

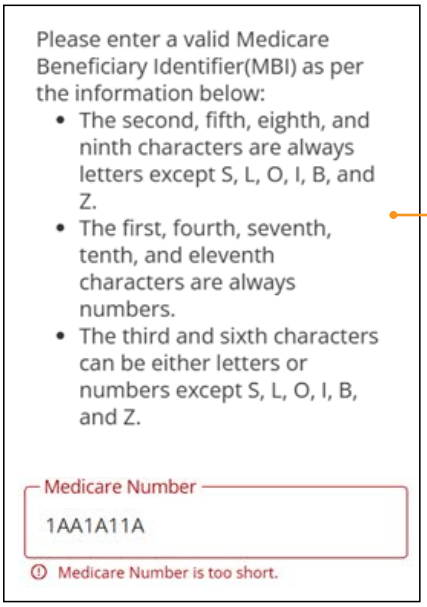


Contact Card Section



Validating Information

Any changes made on the Policyholder Details Page will be processed through the following systems to ensure accuracy and compliance with Membership rules:



Auto-Enrollment File:

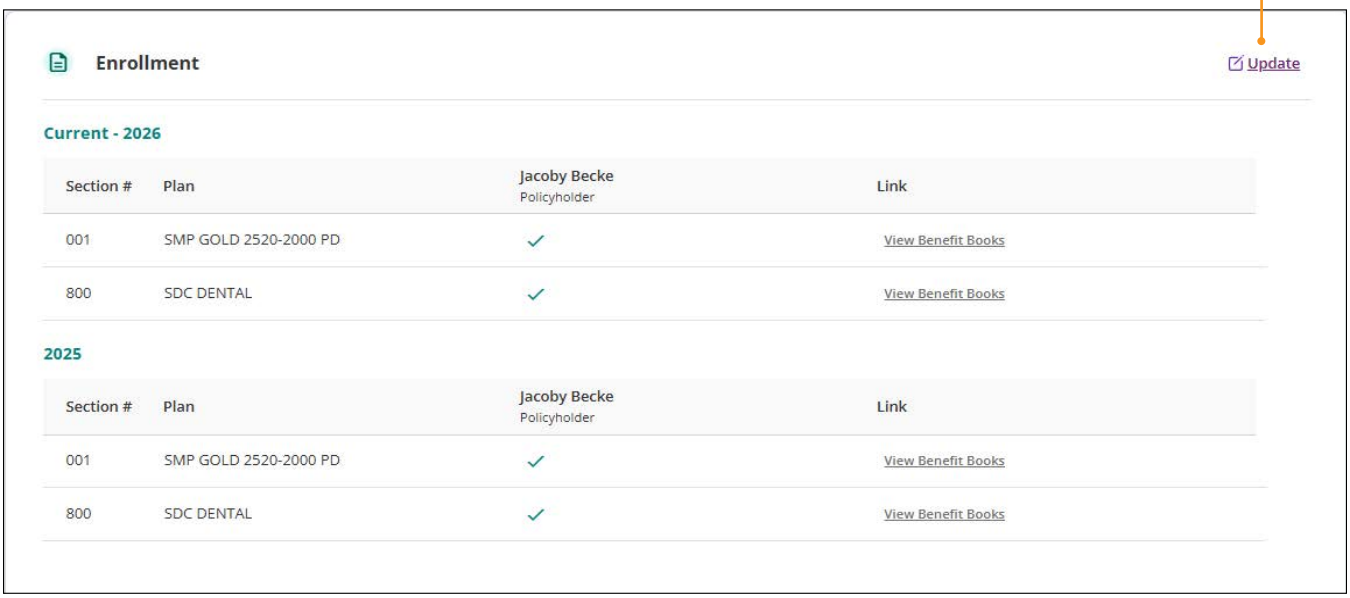
- Changes are batched and processed overnight.
- Ensures that a policyholder's details are updated promptly.

Manual OnBase Queue:

- Changes are reviewed and processed manually.
- Provides an additional layer of verification to ensure all updates are accurate and comply with Membership rules.

Enrollment Information

1. **Update Link** - Opens the Event workflow.

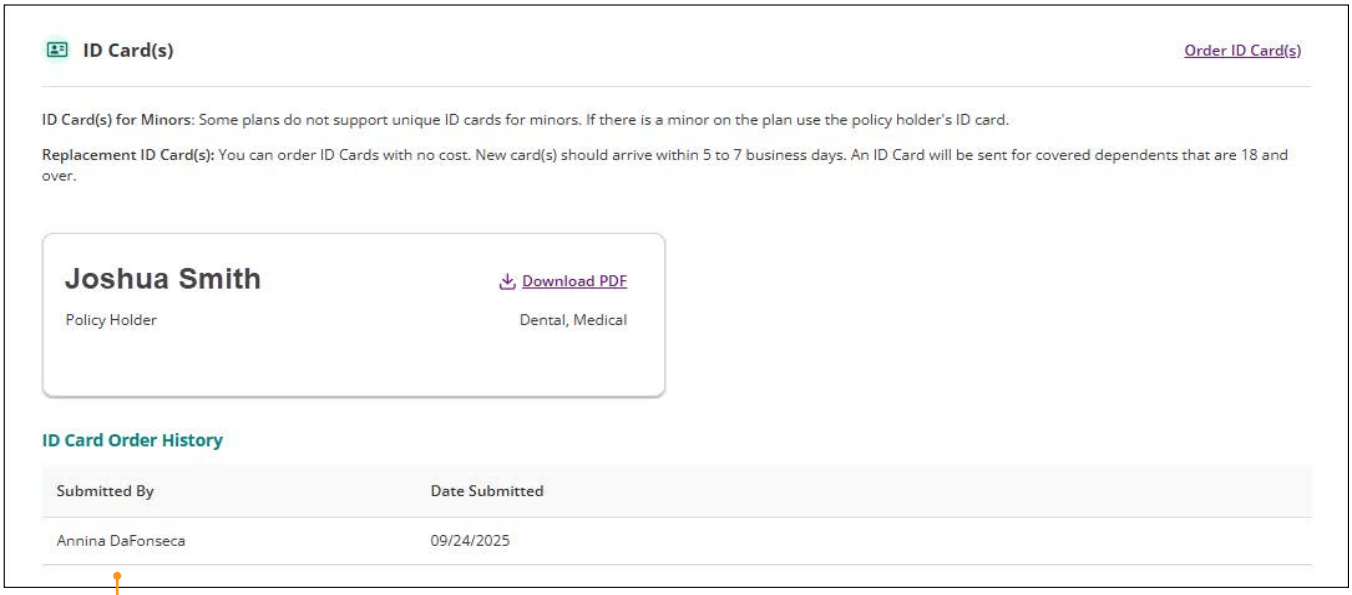


Dependent Information



1. **Dependent Information Dropdown** - Opens a drop-down menu with dependent information that can be updated.

ID Cards



1. **Dependent Information Dropdown** - Opens a drop-down menu with dependent information that can be updated.
2. **Download PDF Link** - Downloads a PDF of the member's ID cards. This can be sent to the member via email.

Event Workflow

Overview

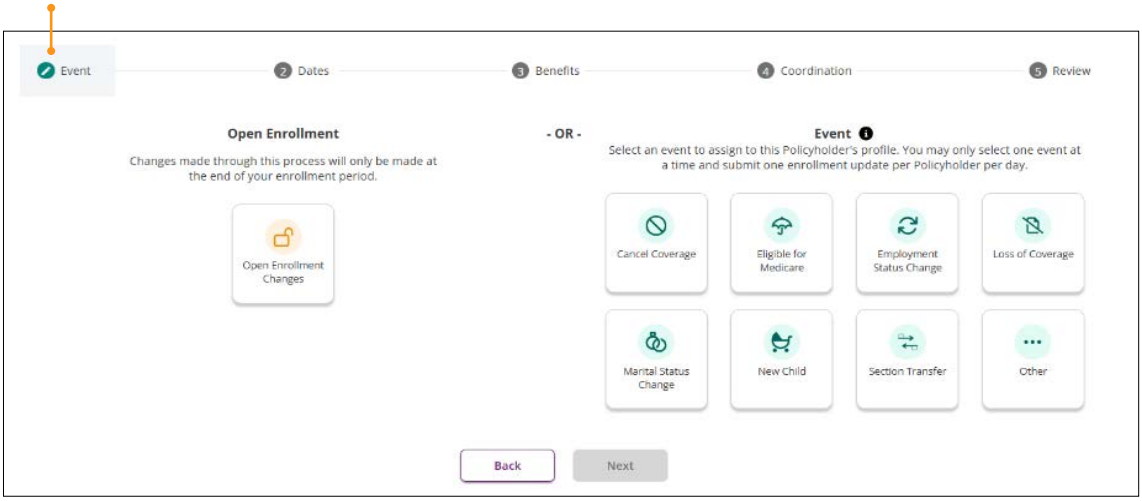
The Event Workflow is triggered by clicking the Add a New Policy Holder link from the Roster page or Update link from a policyholder's enrollment page. This allows the administrator to update a member's enrollment information outside of the annual enrollment period (AEP).

Any updates to enrollment information will be processed through the following systems to ensure accuracy and compliance with Membership rules:

Auto-Enrollment File	Manual OnBase Queue
Changes are batched and processed overnight, which ensures that a policyholder's enrollment details are updated promptly.	Changes are reviewed and processed manually to provide an additional layer of verification to ensure updates are accurate and comply with Membership rules.

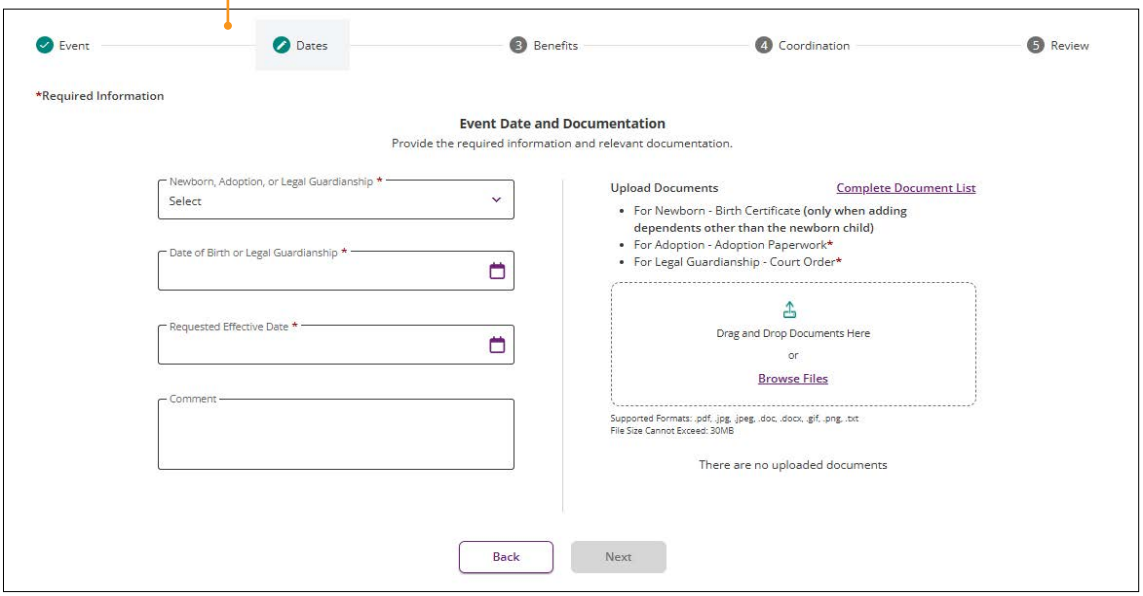
STEP 1: LIFE EVENT

Select the life event that is triggering this enrollment update. Only one event can be selected at a time.



STEP 2: DATES

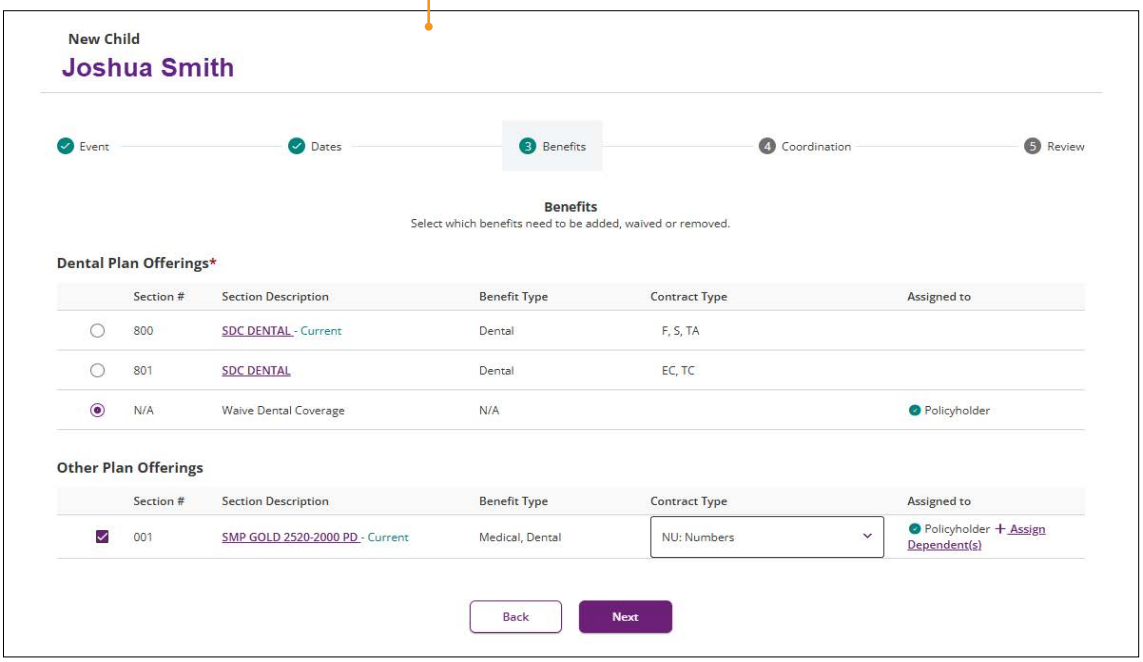
Identify the date that the event occurred along with the effective date. Upload required documentation to proceed to the next step.



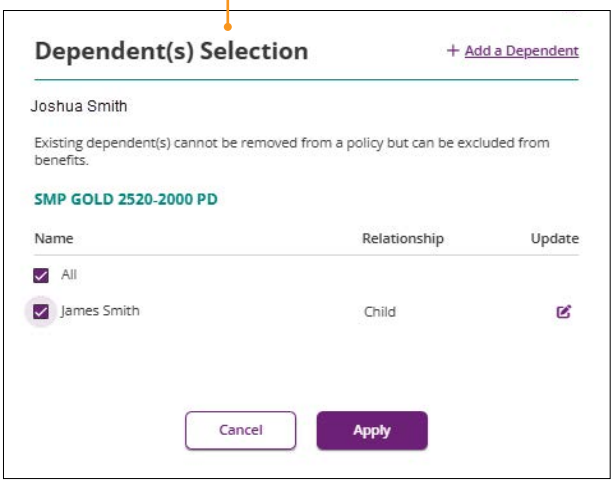
STEP 3: BENEFITS

a. Update and select benefits to account for the Qualifying Life Event.

New dependents are not automatically assigned to the plan. Select the Assign Dependents link to select a dependent and assign them to the plan.



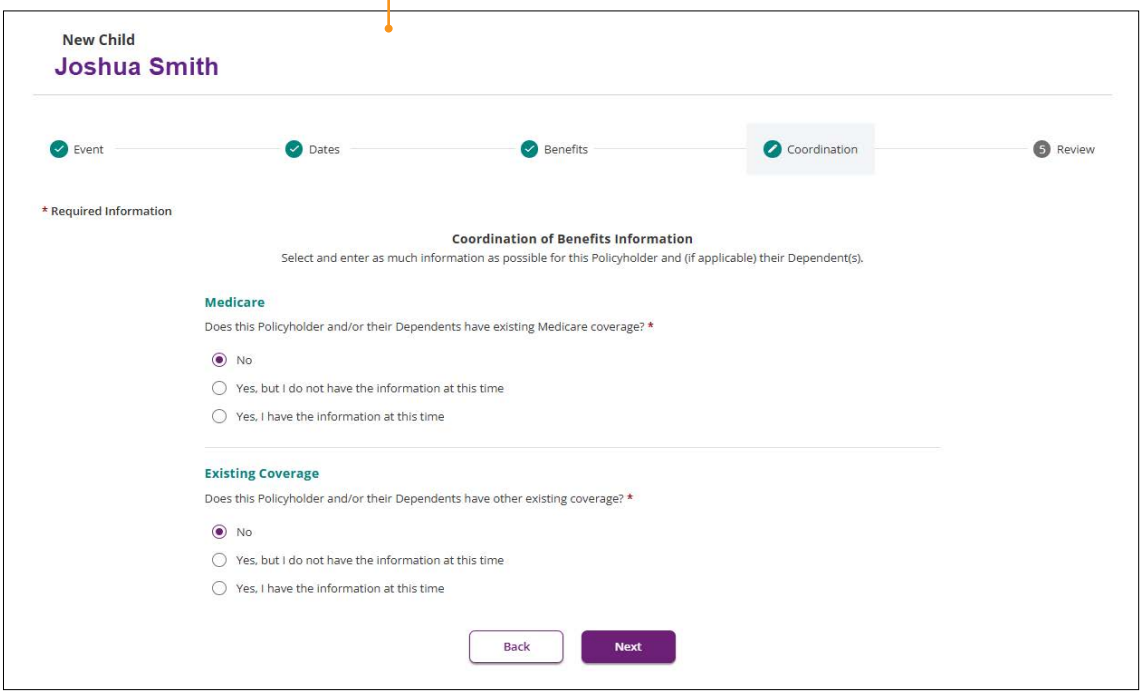
b. On the Dependent Selection panel, the Admin will select a pre-existing dependent profile or add a new dependent profile. After selecting a profile, click apply to assign them to the contract and click next to proceed to the Review step.



STEP 4: COORDINATION

Input any information that can be obtained for Coordination of Benefits. No information is required to move to the next step in the process.

Clicking the option "*Yes, I have the information at this time*" will open additional panels where users can input their coordination information.



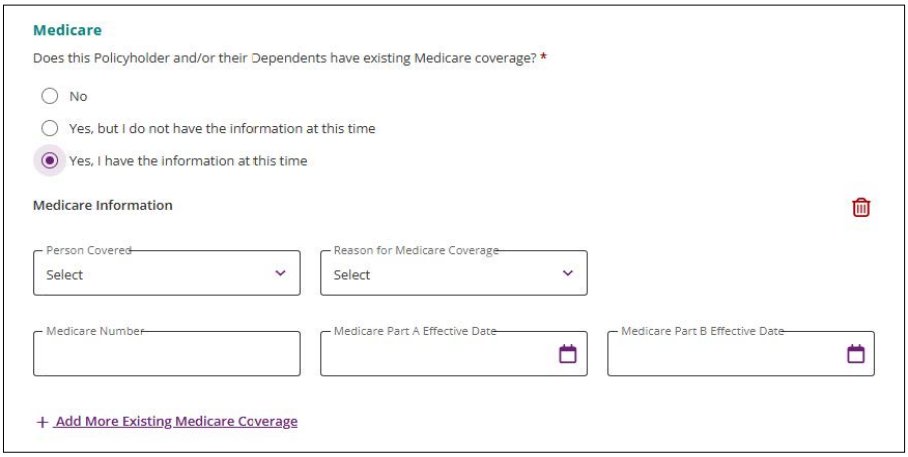
Medicare Panel

Fill out the designated fields with ***any*** Medicare information that is available.

a. All fields are optional. The user may continue their process after filling out any field.

b. Click the link to add additional Medicare coverage information.

c. Click the trash can icon to delete the Medicare coverage record.



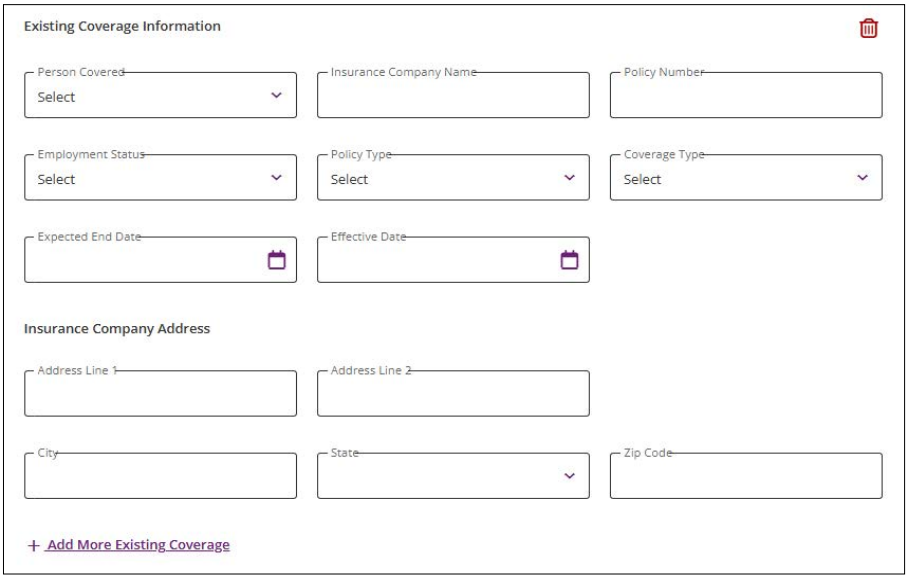
Existing Coverage Panel

Fill out the designated fields with ***any*** information that is available about other existing coverages.

a. All fields are optional. The user may continue their process after filling out any field.

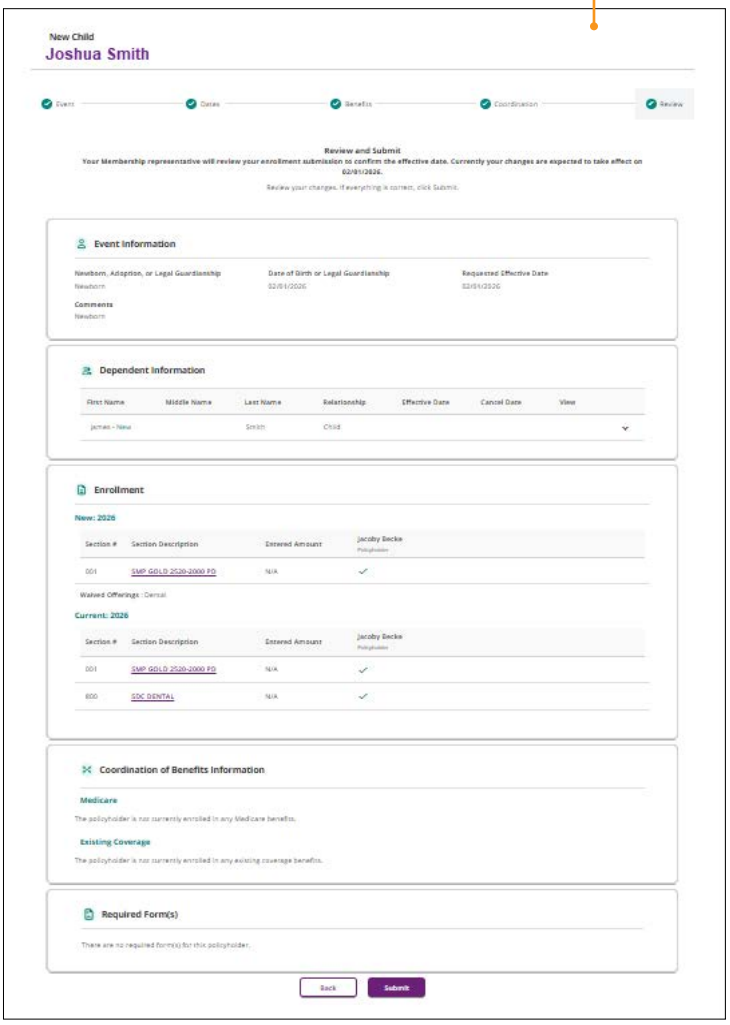
b. Click the link add additional coverage information.

c. Click the trash can icon to delete the coverage record.



STEP 5: REVIEW AND SUBMIT:

Review and submit the enrollment changes.



STEP 6: CANCELING COVERAGE

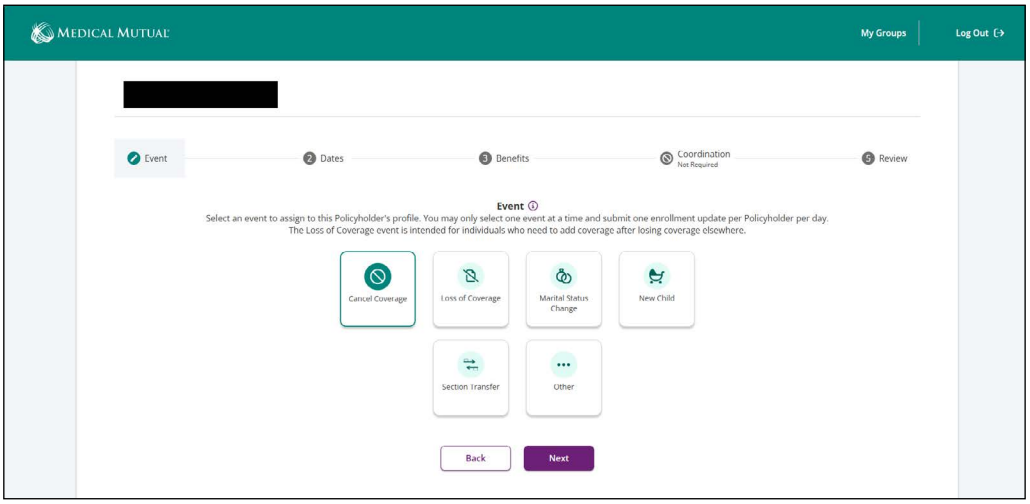
A guide for canceling policyholder or dependent coverage.

Step 1 of 2: Find the Policyholder

1. Open the Roster: Navigate to the Roster from the MED main menu.
2. Locate the Policyholder: Find the policyholder whose coverage you need to cancel.
3. Select the Policyholder ID: If you need to review or cancel dependent coverage, select the Policyholder ID. This opens the Policyholder Details page.

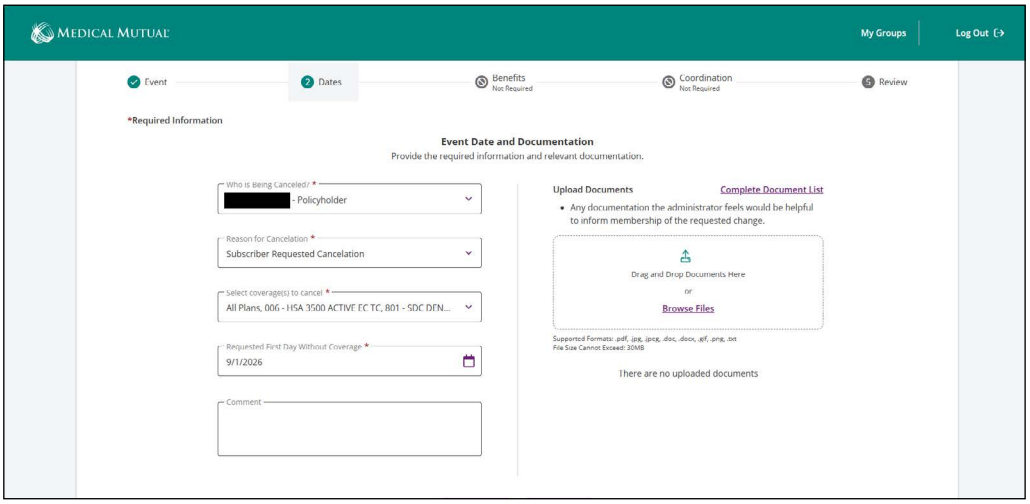
Step 2 of 2: Complete the Cancelation

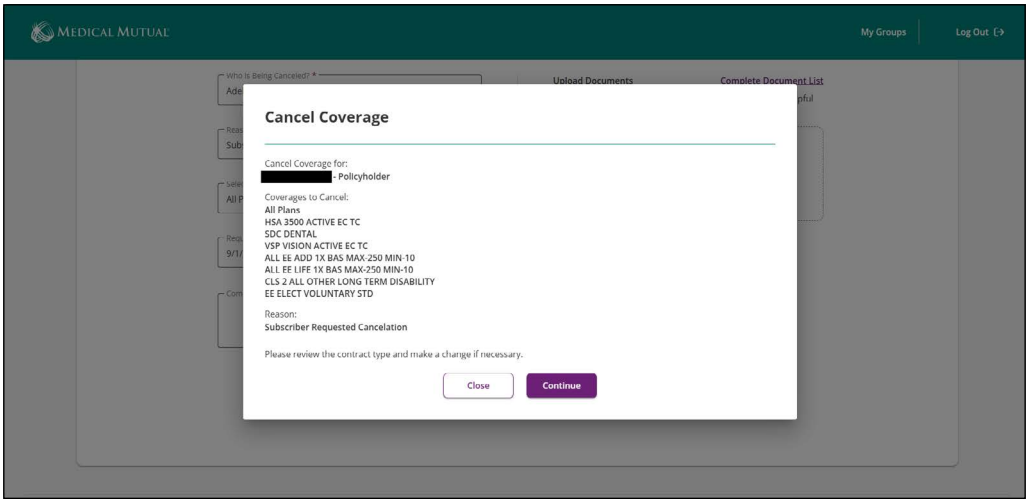
4. Scroll to the Enrollment Section: On the Policyholder Details page, scroll down to the Enrollment card and select the purple Update link. This launches the enrollment flow.
5. Select Cancel Coverage: On the Event page, select Cancel Coverage.



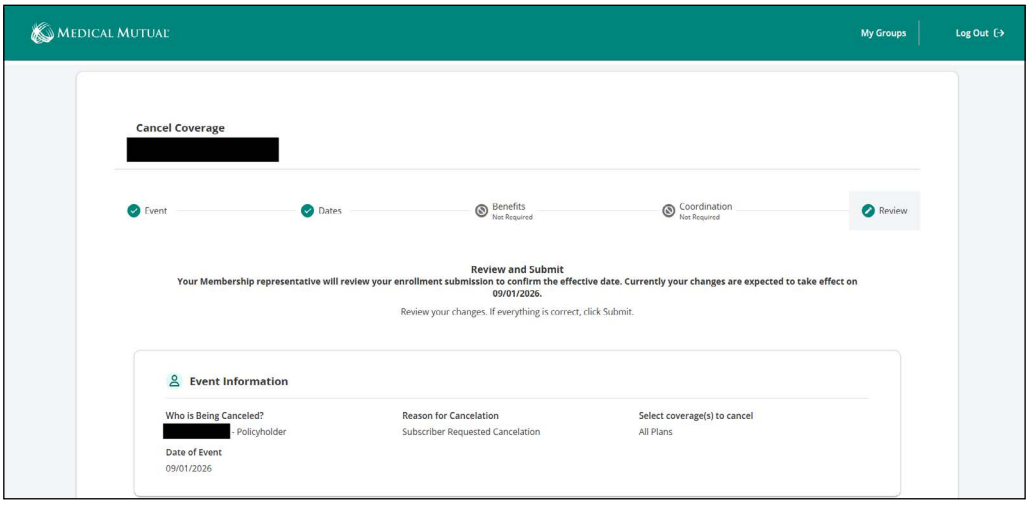
6. Complete All Required Fields

Required Field	What to Enter
Individual(s)	Select the member(s) whose coverage is being canceled.
Reason for Cancelation	Choose the appropriate reason from the available options.
Coverage Section(s)	Select the coverage section(s) to be canceled.
Effective Date	The first day without coverage.





7. Review and Submit: Once all required fields are complete, review your entries and submit the transaction.



Important Considerations

Canceling Policyholder or Contract Coverage

When terminating coverage at the policyholder or contract level, no additional changes are typically required. Simply review your entries and submit the transaction.

Canceling Dependent Coverage Only

When terminating dependent coverage only, check whether the remaining covered members require a different contract type. If so, update the type of contract before submitting.

Need Help?

Contact EmployerDashboardOwner@MedMutual.com if you encounter any errors, if a field is unclear, or whether a system message prevents submission.

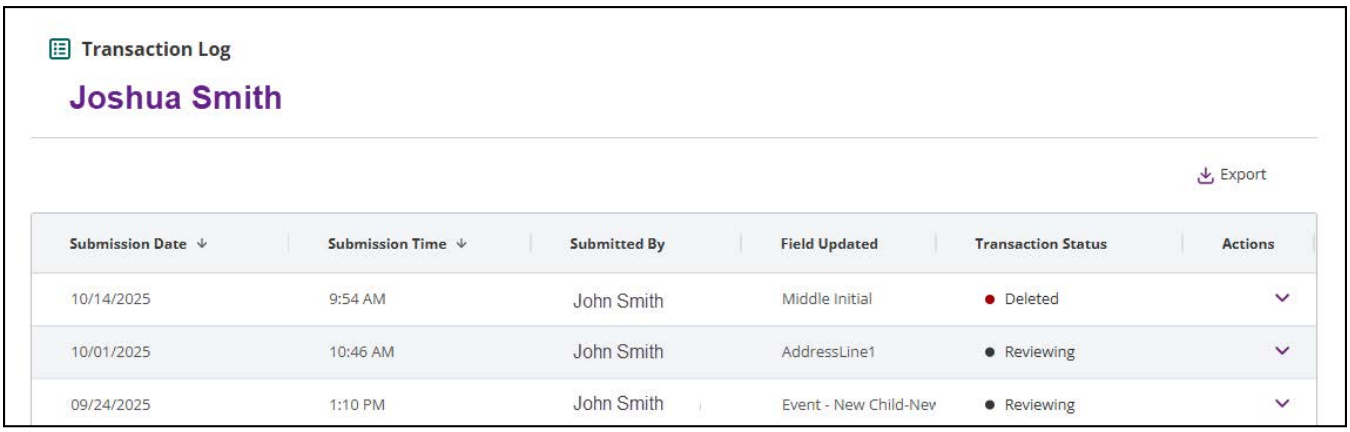
Transaction Log

Overview

MED profiles two types of transaction logs to help users track and validate changes made to member data: Policyholder Transaction Log and Group Transaction Log.

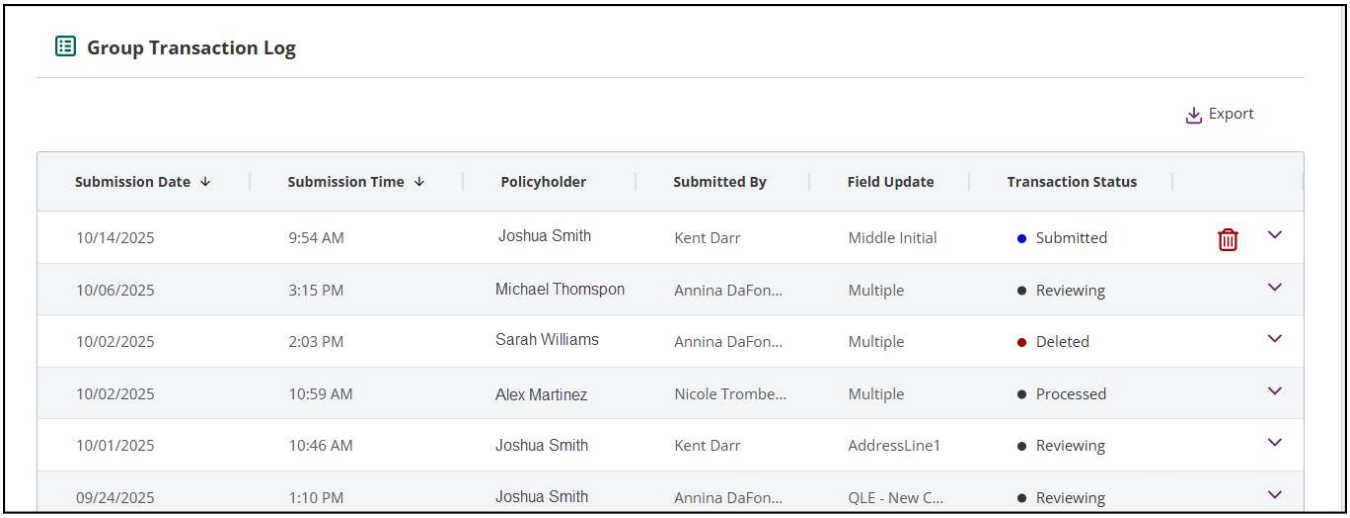
Policyholder Transaction Log

This log displays transactions specific to individual policyholders and their dependents. It's ideal for reviewing changes made to a single member's record — such as updates to coverage, demographic details or enrollment status. Users can monitor the status of each change and ensure it has been processed correctly.



Group Transaction Log

The Group Transaction log offers a comprehensive view of ***all member transactions within a group***. This provides administrators with a centralized location that aggregates every transaction whether it was submitted via the Auto Enrollment File or Manual OnBase Queue.



Transaction Log Statuses and Membership Implications

These statuses help track the life cycle of a change from submission to completion (or cancelation). These statuses slightly differ depending on whether changes are being submitted to the Auto Enrollment File or Manual OnBase Queue.

AUTO-ENROLLMENT FILE STATUSES

- **Submitted** The auto-enrollment file change request has been submitted and can still be deleted.
- **Processed** The auto-enrollment file change has been processed.
- **Error** The auto-enrollment file (AE) change request has encountered an error during processing and has failed on the AE job.
- **Completed** The final auto-enrollment file status, showing that the change has successfully completed. *This status will only be shown once a status file is run and it finds a record.*
- **Deleted** The final status if a change request was deleted/remove during the Submitted status. *This status will only be shown once a status file is run and it finds a record.*

Manual OnBase Queue Status		
	Submitted	The manual change request has been submitted and can still be deleted.
	Reviewing	The manual change request is currently under review.
	Completed	The manual change request has been successfully completed.
	Deleted	The manual change request has been deleted/removed and will not be submitted for review.

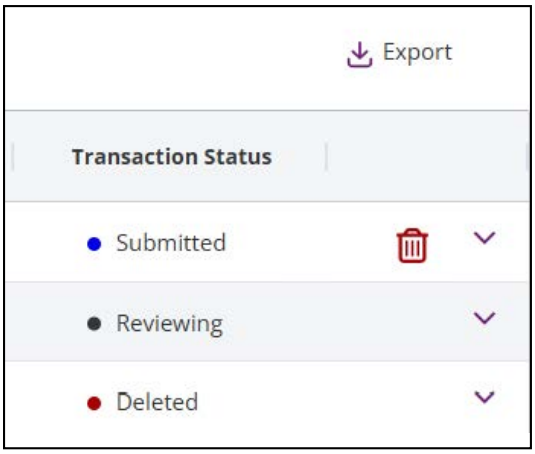
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1. **Navigation Menu** - Each row represents a different transaction. The transaction status represents where the transaction is in the review process.
2. **Export Button** - Exports the log into an Excel file.
3. **Delete transaction** - Temporary option that appears after a transaction has been submitted but before it has been processed. Allows the administrator to cancel a transaction that was made in error or was changed after the fact.

   A transaction can be deleted from either the Policyholder or Group Log.

Deleting Transactions in Submitted Status (Before Processing)

Users have the ability to delete a transaction before it is processed — whether they are working within the Policyholder Transaction Log or Group Transaction Log. This feature is especially useful when a transaction was submitted in error or whether there has been a change in a decision.



Invoicing

Overview

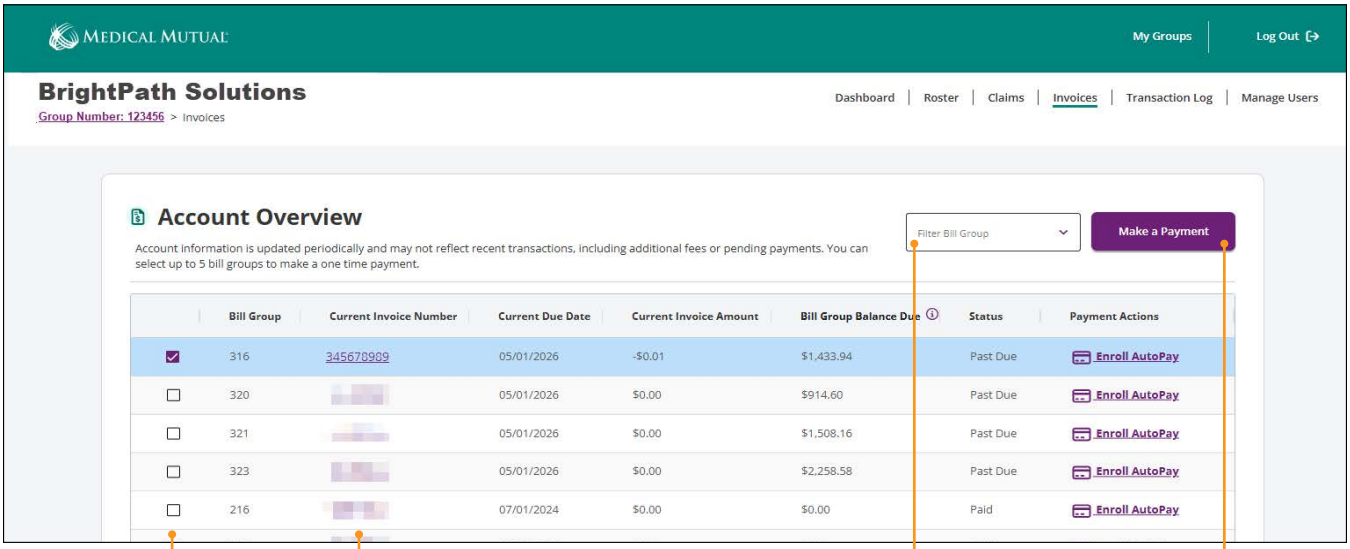
The Invoicing Page will provide invoicing information and payment options to Group Administrators. (Note: For ClaimsLink and ReportLink access, please continue the current process for adding groups.)

Account Overview

This section displays the high-level details of the account's payment information and includes tools for making and managing payments.

This table details all of the billing groups listed under the account. Details include:

- Numbers of each bill group under the account
- Numbers for each group's invoice
- The due date of the current invoice
- The amount due on the current invoice
- The overall balance due for the bill group
- Status of the invoice
- A link for managing autopay options of the bill group



Use this column to select the bill group(s) that payments will be made for. **NOTE:** This column will display with different types of buttons based on the payment configuration setup for the account.

See below for more details.

Click this link to open the invoice details page.

Use this menu to filter the bill groups displayed in the Account Overview table and the Invoice History table (details below).

Click this button to open to make one of three types of payments:

1. One-time payment – made the day of the payment
2. Schedule a future payment
3. Enroll/Manage options for Autopay

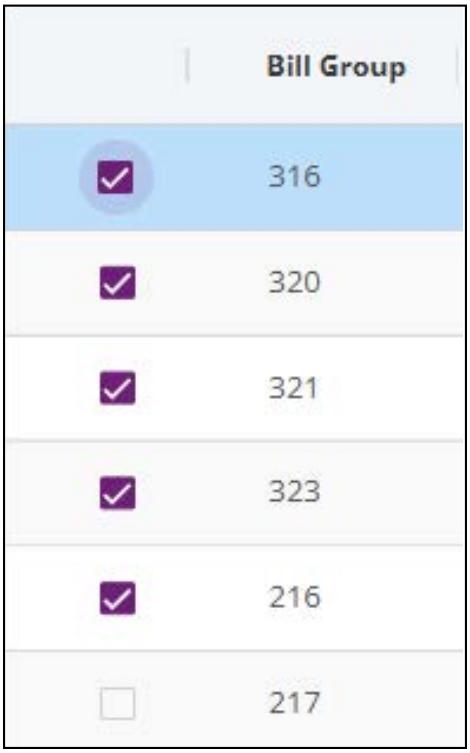
Payment Configurations and Bill Group Selection

Group administrators have permission to select from two different types of payment configurations for their bill group:

- Using the same payment account for all bill groups.
- Using different payment accounts for each bill group.

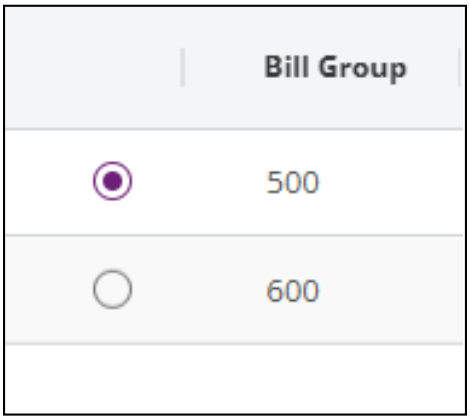
Single Payment Account

Accounts that use a single payment account use checkboxes to allow for multiple invoices to be selected and paid from the same account. When using the Make Payment button, up to five bill groups can be selected at once.



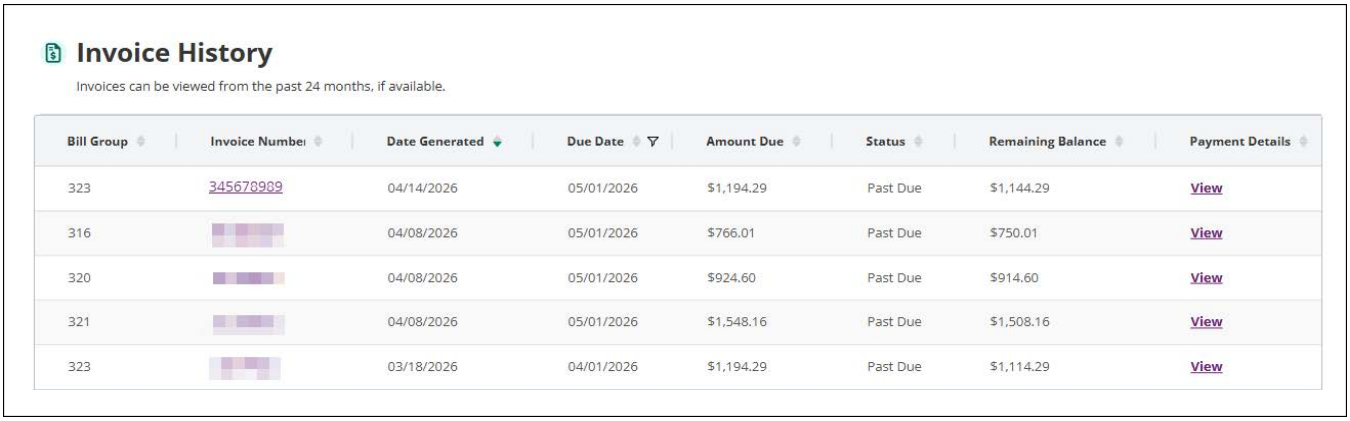
Different Payment Amount

Accounts that use multiple payment accounts use radio buttons to limit the user to one bill group per payment.



Invoice History

This section displays historical information of invoices billed to the group's account during the past 24 months. It provides users with more details about each transaction and allows them to drill down into individual invoices.



Click the link to open the invoice details page to view or download a detailed version of the invoice.

Click the button to sort the column by highest and lowest values.

Under the filter button, click the tab to customize how the columns appear on your screen.

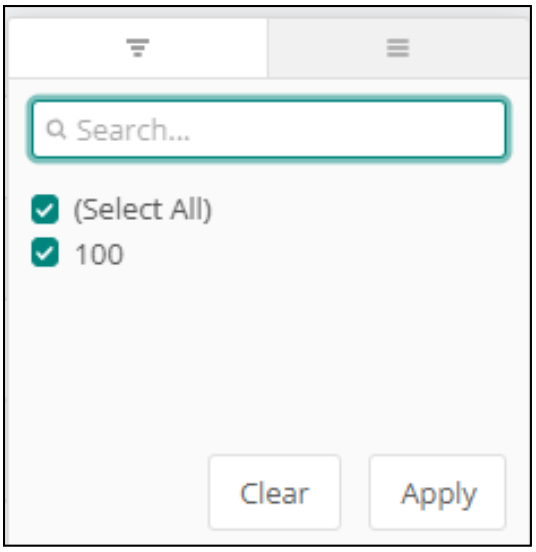
Click the link to open a pop out with details about payments that were made to this invoice, including:

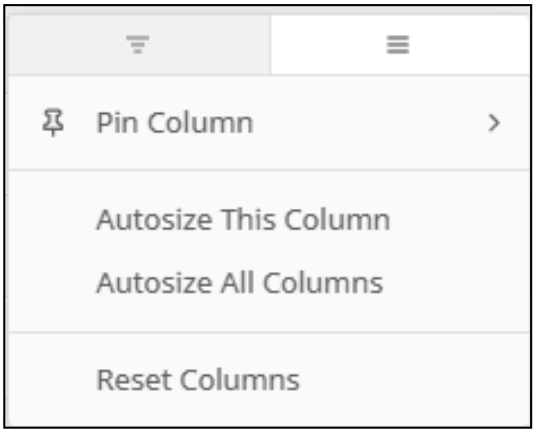
- Confirmation Number
- Date
- Invoice Number
- Payment Method

Column Options

Clicking the Column Options button will open a pop out that allows users to set the column to their preferences.

- Filter tab A allows users to apply various filters to trim down the values appearing in the column.
- Filter tab B allows the user to customize how the columns appear on the screen.

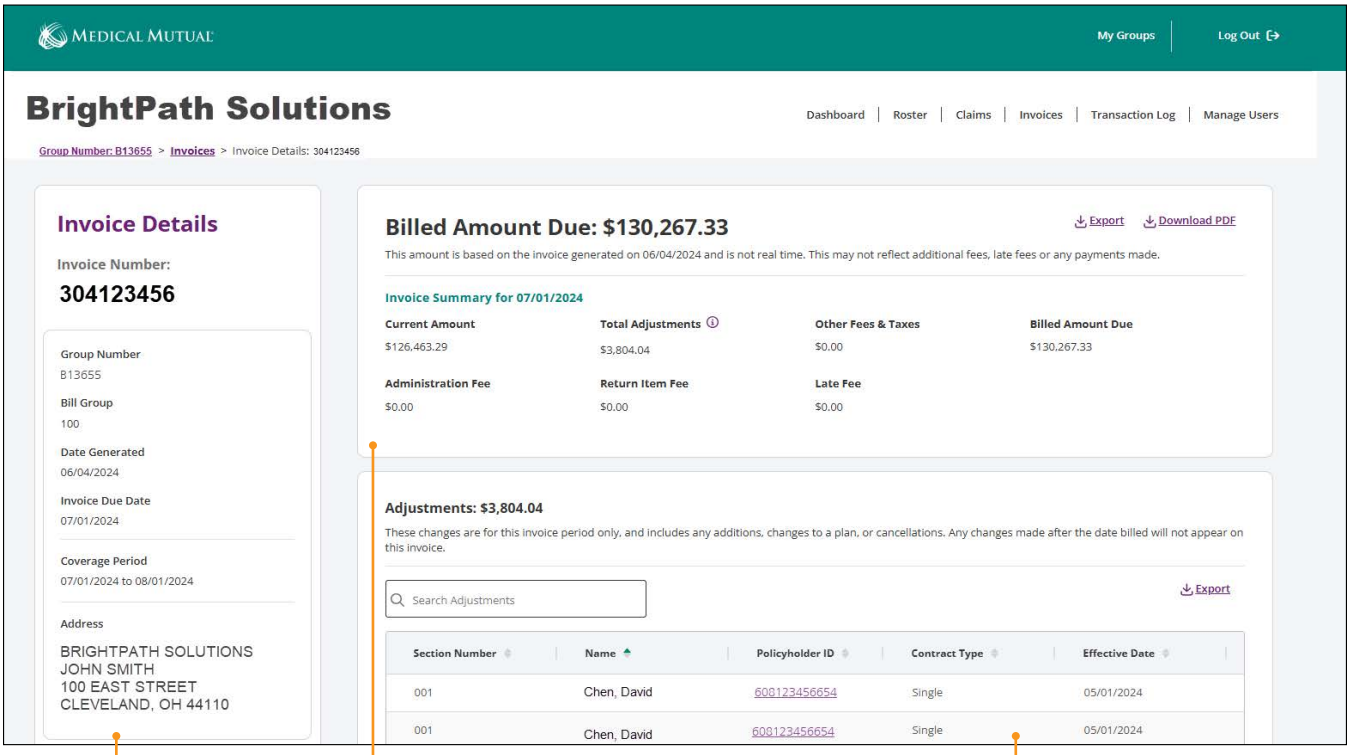




Invoicing Details

Overview

The Invoicing Details Page will provide a detailed background of individual invoices for users and Medical Mutual administrators to reference.



This box shares the basic details of the invoice.

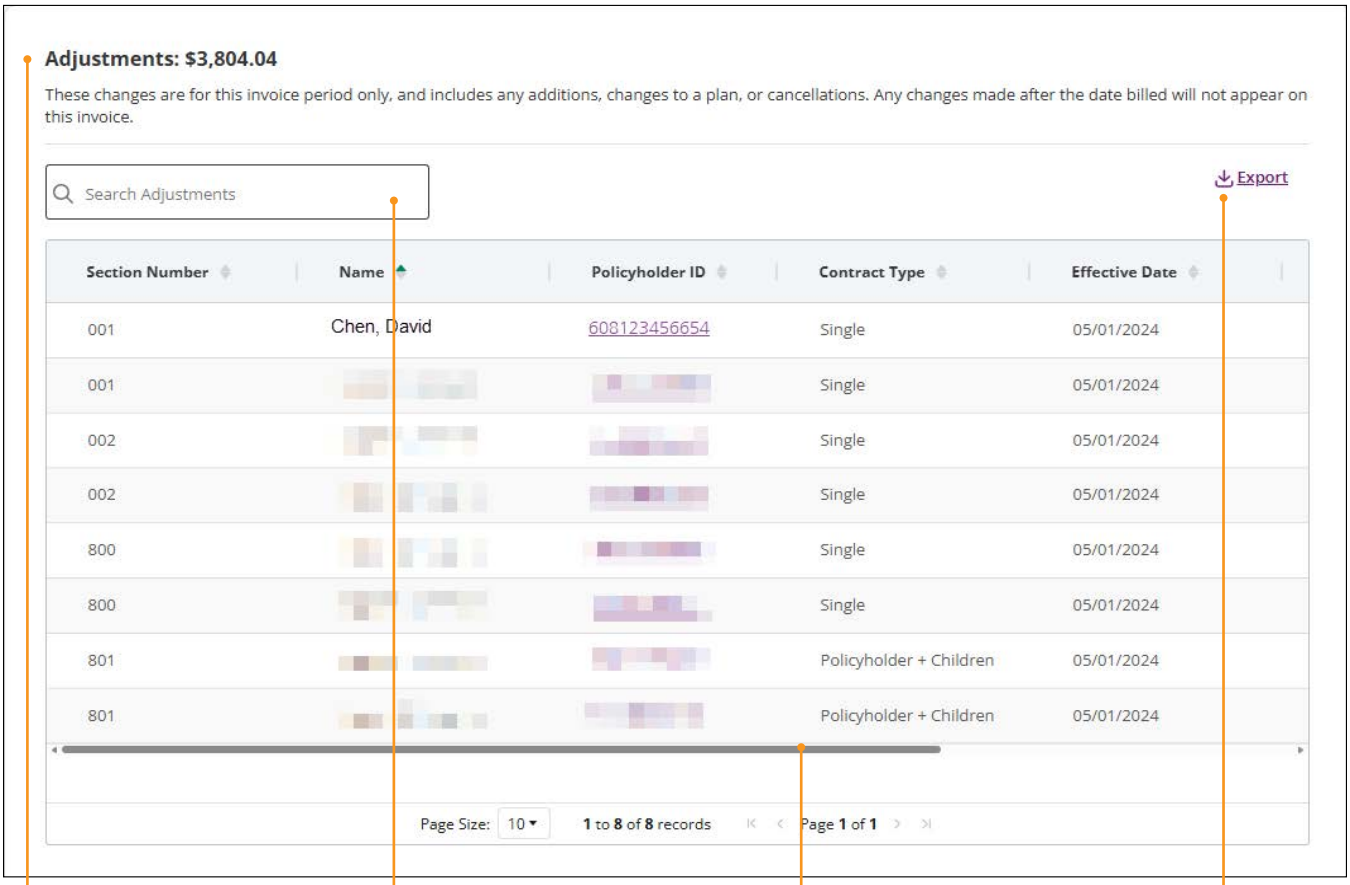
This section breaks down the amount billed in the invoice.

- The ***Export*** button allows users to export the invoice in a CSV or Excel format.
- The ***Download PDF*** button allows users to download a detailed PDF of the invoice.

This section details the adjustments that have been made to the invoice (see below for more details).

Adjustment Section

This section displays adjustments that have been made to specific invoices.



This header presents the total number of adjustments that have been made to the invoice during the billing period based on additions, changes to the plan, or cancelations.

Use the search box to locate a specific adjustment. Searches can be done using any of the following criteria:

- Section Number
- Policyholder Name
- Policyholder ID
- Contract Type
- Effective Date

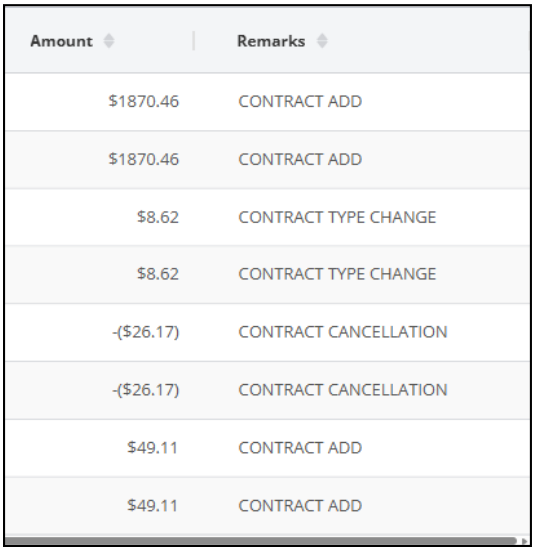
Use the scroll bar to locate additional information about adjustments, including:

- Amount of the adjustment by line item
- Type of adjustment made

Open the Export menu to download adjustment data to a CSV or Excel file.

Amount and Remarks Columns

The Amount and Remarks Columns are found on the far right side of the Adjustments table and include contextual information about each adjustment that was made.

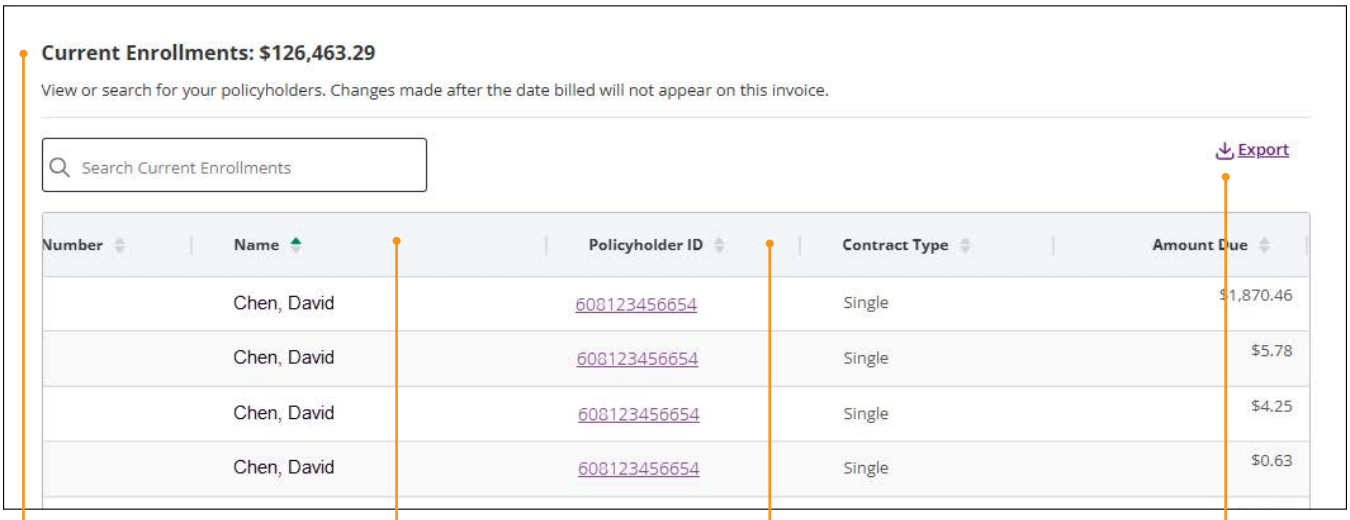


Amount	Remarks
$1870.46	CONTRACT ADD
$1870.46	CONTRACT ADD
$8.62	CONTRACT TYPE CHANGE
$8.62	CONTRACT TYPE CHANGE
-($26.17)	CONTRACT CANCELLATION
-($26.17)	CONTRACT CANCELLATION
$49.11	CONTRACT ADD
$49.11	CONTRACT ADD

- ***Positive amounts*** represent newly added contracts or a change to a contract with additional money being charged in the invoice total.
- ***Negative amounts*** represent contracts that have been cancelled during the invoice period allowing for a fixed amount of money to be refunded to the company and deducted from the total Billed Amount based on the date of cancelation.

Current Enrollments

This current enrollment section lists all of the individual contracts that contribute to the total billing amount being charged on the invoice. When the Current Enrollment and Adjustment totals are added together, they create the Billed Amount Due, which displays at the top of the Invoice Details page.



This box shares the basic details of the invoice.

Includes details for each contract held with Medical Mutual by policyholder. Policyholders with multiple contracts will have one line item per contract, including:

- Section Number
- Policyholder Name
- Policyholder ID
- Contract Type
- Amount

Includes details for each contract held with Medical Mutual by policyholder. Policyholders with multiple contracts will have one line item per contract, including:

- Health Insurance
- Dental Insurance
- Vision Insurance
- Supplemental Insurance

Open the Export menu to download adjustment data to a CSV or Excel file.

Current Enrollments

The final section on the Invoice Details page is the Enrollment Summary section. This section summarizes the total amount of contracts that are included in the Bill Group. The total enrollments are broken down by contract type underneath the summary.



Total Enrolled: 451

Summary of the total amount of contracts for this Bill Group.

Single:	391	**Family:**	22
2 Person Adult:	18	**Policyholder + Children:**	16
Policyholder + 1 Child:	4		



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