
Employer Dashboard User Guide



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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).

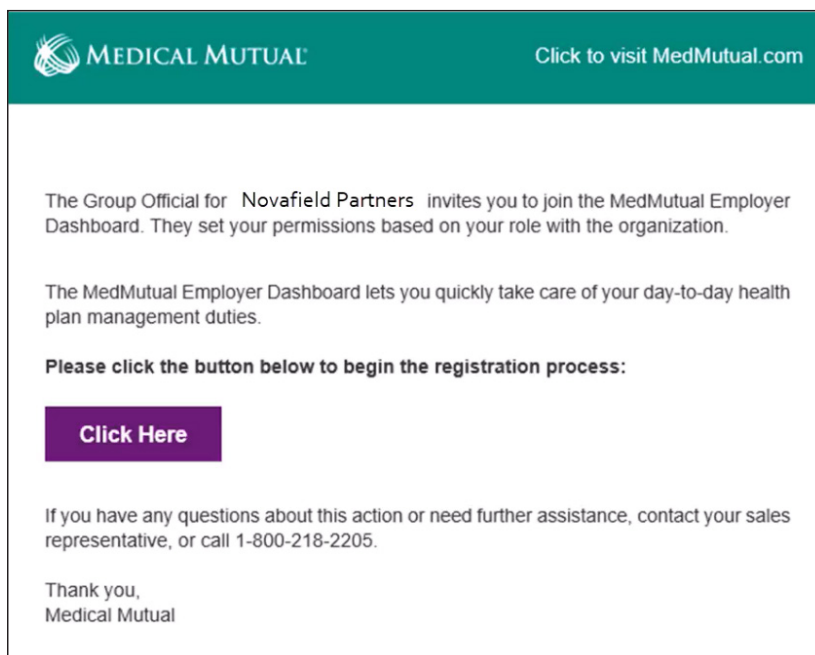
1. **Group Administrator** - This is the primary group administrator who is invited to use MED. The Group Administrator can access every piece of information in the group and can invite and designate other administrators and brokers as needed. ***Each group must have a designated Group Administrator.***
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.



The screenshot shows an email invitation from Medical Mutual. The header features the Medical Mutual logo and the text "Click to visit MedMutual.com". The main body of the email contains the following text: "The Group Official for Novafield Partners invites you to join the MedMutual Employer Dashboard. They set your permissions based on your role with the organization." It then states, "The MedMutual Employer Dashboard lets you quickly take care of your day-to-day health plan management duties." Below this, it says, "Please click the button below to begin the registration process:" followed by a purple button labeled "Click Here". At the bottom, it provides contact information: "If you have any questions about this action or need further assistance, contact your sales representative, or call 1-800-218-2205." and ends with "Thank you, Medical Mutual".

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.

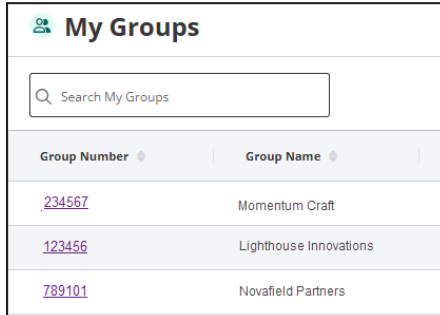
Log in

MedMutual Internal Login

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.

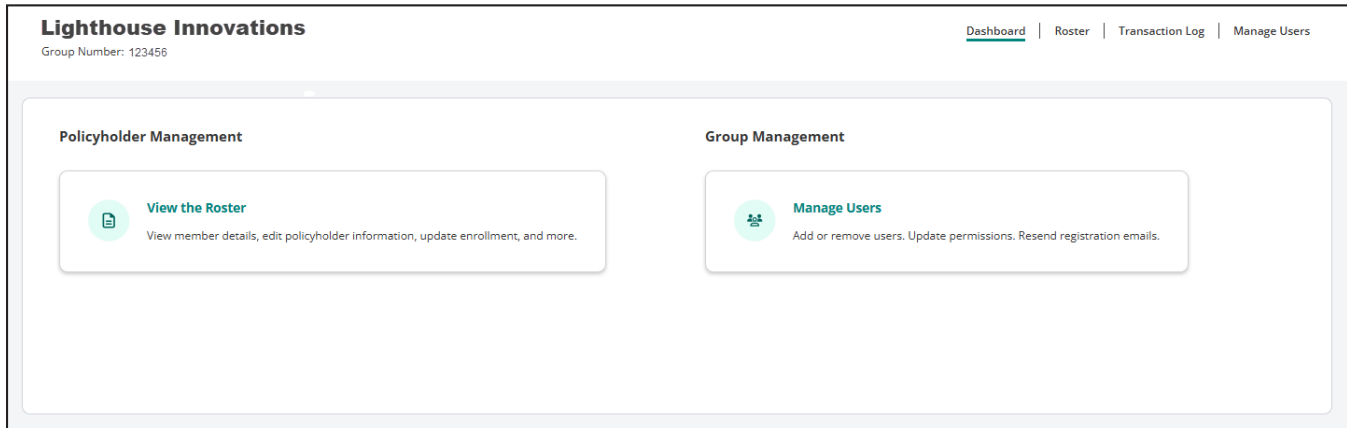


Group Number

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.

Manage Users + Add User					
Last Name	First Name	Email	Status	Actions	User Type
Turner	Michael	Michael.Turner@Lighthou	Active		Group Official
Collins	Sarah	Sarah.Collins@Lighthous	Active		Broker
Reed	Daniel	Daniel.Reed@Lighthous	Active		Broker
Parke	Emily	Emily.Parker@Lighthous	Active		Administrator
Brook	Anthony	Anthony.Brooks@Lightho	Active		Administrator
Lewis	Amanda	Amanda.Lewis@Lightho	Active		Administrator
Miller	Jason	Jason.Miller@Lighthouse	Expired Invite	Resend Registration	Administrator
Ramirez	Nicole	Nicole.Ramirez@Lightho	Active		Administrator
Hayes	Robert	Robert.Hayes@Lighthous	Active		Administrator

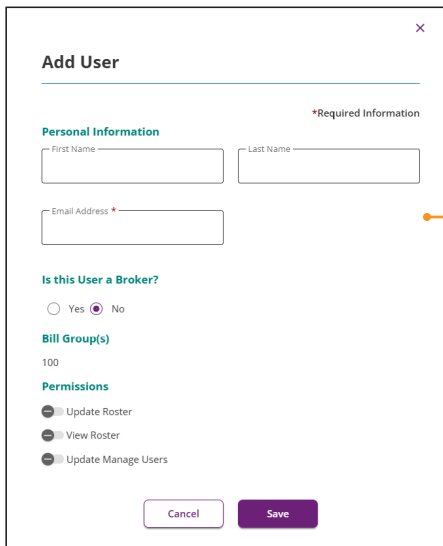
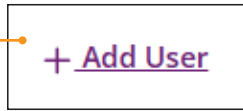
1 to 9 of 9 records << < Page 1 of 1 > >>

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	<p>Three types of users are available on this page:</p> <ul style="list-style-type: none"> ▪ 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.

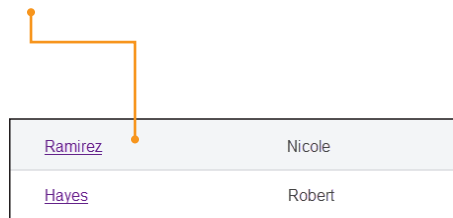


2. Enter the new user's information and assign them permissions.
 - a. Enter the new user's Personal Information. An email address is required.
 - b. Select whether the user is a Broker. Brokers can be assigned any and all permissions but **cannot be made a group administrator**.
 - c. Assign permissions 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.



Ramirez	Nicole
Hayes	Robert

User type has changed. Please reassign permissions for this User.

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 + Add a New Policyholder								
<input type="text" value="Search the Roster"/>				Export		Section Glossary		Display Columns
Member ID	Last Name	First Name	Date Of Birth	Contract Type	Enrollment Status	Section #	Section Name	Section Description
123456789101	Martinez	Alex	05/03/2002	Single, Single	● Active	001, 800	Lighthouse Innovations	SMP GOLD 2520-2000
456789101112	Williams	Sarah	04/07/1996		● Cancelled			
234567891012	Lee	Jordan	03/21/1984	Family	● Active	800	Lighthouse Innovations	SDC DENTAL
678910111245	Patel	Priya	05/22/1992	Two person adult	● Active	800	Lighthouse Innovations	SDC DENTAL
345678910122	Thompson	Michael	03/02/1977		● Cancelled			
101112131789	Johnson	Emily	10/29/1979	Subscriber and ch...	● Active	801	Lighthouse Innovations	SDC DENTAL
456789101223	Chen	David	04/16/1977	Employee and chil...	● Active	001, 800	Lighthouse Innovations	SMP GOLD 2520-2000
891011124567	Hassan	Amina	09/20/1999		● Cancelled			
567891012234	Rivera	Carlos	09/21/1972	Two adults and tw...	● Active	001, 800	Lighthouse Innovations	SMP GOLD 2520-2000
810111245679	Rodriguez	Sophia	04/29/2002		● Cancelled			

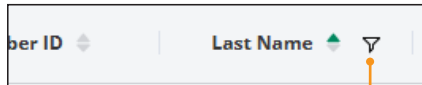
Records Per Page 1 to 10 of 16 records Page 1 of 2

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 Policyholder	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

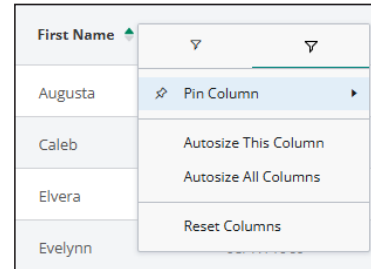
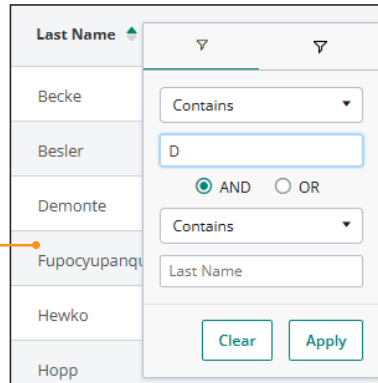
Two buttons on the Roster page will activate pop-out panels for further adjustments.

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.

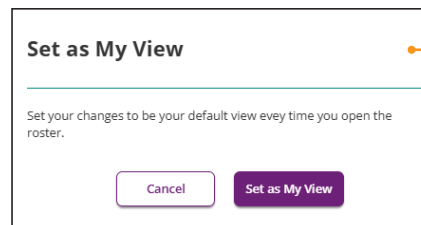
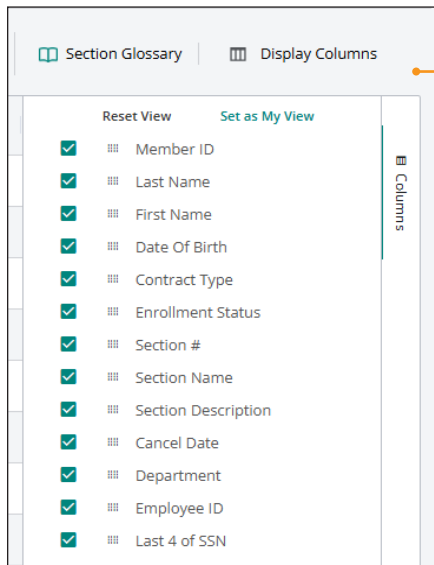


Display Columns

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.

Lighthouse Innovations								Dashboard	Roster	Transaction Log	Manage Users
Group Number: 390770 > Roster > Section Glossary											
<input type="text" value="Search Section Glossary"/>								Export	Display Columns		
Section #	Section Name	Section Description	Benefit Type	Benefit Description	Contract Type	Benefits Book	Effective Date	Cancel			
001	Lighthouse Innovations	SMP GOLD 2520-2000 PD	Combined	SMP GOLD 2520-2000 PD	Dependent Not Ve...	Unavailable	03/31/2018	12/30			
801	Lighthouse Partners	SDC DENTAL	Dental	SDC APRIL CONVERSION ...	Employee and chil...	Unavailable	03/31/2023	12/30			
800	Lighthouse Partners	SDC DENTAL	Dental	SDC APRIL CONVERSION ...	Family, Single, Two...	Unavailable	03/31/2023	12/30			

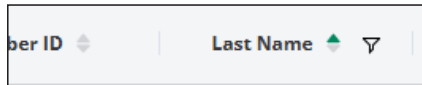
Records Per Page: 10 | 1 to 3 of 3 records | Page 1 of 1

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.

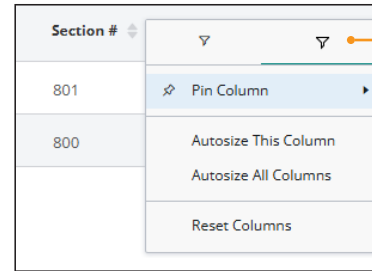
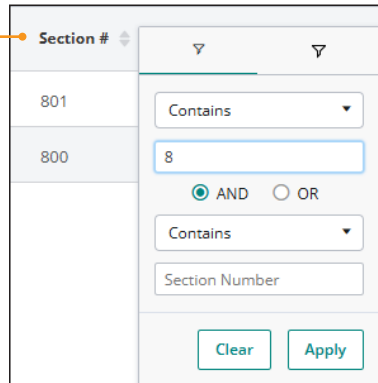
Panels

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.



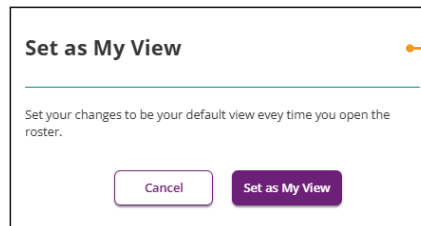
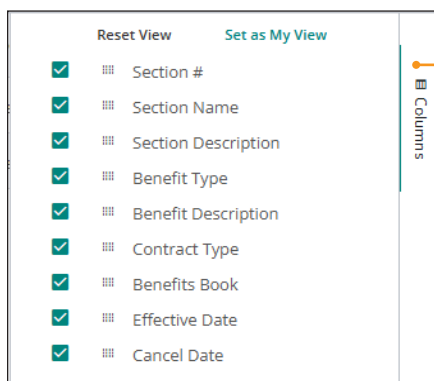
Filter tab B allows the user to set their preferences for the column that they are using.

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.

Joshua Smith

- Active
- Policyholder Information
- Enrollment
- Dependent Information
- ID Card(s)

Contact Card [Update](#)

Primary Phone Number
(216)123-4567

Alternate Phone Number

Email Address
d5r1v6k1d1etzvry4b4o5amb4jfepomtt4zgsot7bjcz6gdekntclq@example.com

Address
14 Brimmer St
Milan, OH 44846

[Transaction Log](#)

Policyholder Information [Update](#)

Personal Information

First Name Joshua	Middle Initial S	Last Name Smith
Social Security Number	Gender Male	Tobacco User No
Date of Birth 05/03/2002	Marital Status Single	Marriage Date 01/29/2001

Employment Information

Employee ID	Department D8089-01	Employment Status Active
Date of Hire 09/09/2024		

Policy Information

Member ID 123456789101	Enrollment Status Active	
Medicare Enrollee No		

Enrollment [Update](#)

Current - 2025

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

Personal Information


First Name *
Joshua

Social Security Number 


Date of Birth *
5/3/2002 


MAY 2002 < >

S	M	T	W	T	F	S
MAY	1	2	3	4		
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	




Policy Information

Member ID 
123456789101

Medicare Enrollee 

Yes

No 

Contact Card Section

Contact Card

***Required Information**

Primary Phone Number


Alternate Phone Number

Email Address

Address Line 1 *

Address Line 2

City *

State * 

ZIP Code *

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:

Please enter a valid Medicare Beneficiary Identifier (MBI) as per the information below:

- The second, fifth, eighth, and ninth characters are always letters except S, L, O, I, B, and Z.
- The first, fourth, seventh, tenth, and eleventh characters are always numbers.
- The third and sixth characters can be either letters or numbers except S, L, O, I, B, and Z.

Medicare Number

ⓘ Medicare Number is too short.

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.

 **Enrollment**  [Update](#)

Current - 2026

Section #	Plan	Jacoby Becke Policyholder	Link
001	SMP GOLD 2520-2000 PD	✓	View Benefit Books
800	SDC DENTAL	✓	View Benefit Books

2025


Section #	Plan	Jacoby Becke Policyholder	Link
001	SMP GOLD 2520-2000 PD	✓	View Benefit Books
800	SDC DENTAL	✓	View Benefit Books

Dependent Information

 Dependent Information Expand the dependents row to see more information						
First Name	Middle Name	Last Name	Relationship	Effective Date	Cancel Date	Update
Judy		Smith	Spouse	08/04/2025		▼
James		Smith	Child	02/01/2026		▼

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

ID Cards

 **ID Card(s)** [Order ID Card\(s\)](#)

ID Card(s) for Minors: Some plans do not support unique ID cards for minors. If there is a minor on the plan use the policy holder's ID card.

Replacement ID Card(s): You can order ID Cards with no cost. New card(s) should arrive within 5 to 7 business days. An ID Card will be sent for covered dependents that are 18 and over.

Joshua Smith [Download PDF](#)

Policy Holder Dental, Medical

ID Card Order History

Submitted By	Date Submitted
Annina DaFonseca	09/24/2025

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.

The screenshot shows a multi-step process flow at the top: 1. Event (selected), 2. Dates, 3. Benefits, 4. Coordination, 5. Review. Below the flow, there are two main options: "Open Enrollment" and "Event".

Open Enrollment
Changes made through this process will only be made at the end of your enrollment period.

Event
Select an event to assign to this Policyholder's profile. You may only select one event at a time and submit one enrollment update per Policyholder per day.

The "Event" section contains a grid of eight buttons with icons and labels:

- Cancel Coverage
- Eligible for Medicare
- Employment Status Change
- Loss of Coverage
- Marital Status Change
- New Child
- Section Transfer
- Other

At the bottom of the screen, there are two buttons: "Back" and "Next".

STEP 2: DATES

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

***Required Information**

Event Date and Documentation
Provide the required information and relevant documentation.

Newborn, Adoption, or Legal Guardianship *
Select

Date of Birth or Legal Guardianship *
📅

Requested Effective Date *
📅

Comment

Upload Documents [Complete Document List](#)

- For Newborn - Birth Certificate (only when adding dependents other than the newborn child)
- For Adoption - Adoption Paperwork*
- For Legal Guardianship - Court Order*

Drag and Drop Documents Here
or
[Browse Files](#)

Supported Formats: .pdf, .jpg, .jpeg, .doc, .docx, .gif, .png, .txt
File Size Cannot Exceed: 30MB

There are no uploaded documents

[Back](#) [Next](#)

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.

New Child
Joshua Smith

Benefits
Select which benefits need to be added, waived or removed.

Dental Plan Offerings*

Section #	Section Description	Benefit Type	Contract Type	Assigned to
<input type="radio"/> 800	SDC DENTAL - Current	Dental	F, S, TA	
<input type="radio"/> 801	SDC DENTAL	Dental	EC, TC	
<input checked="" type="radio"/> N/A	Waive Dental Coverage	N/A		<input checked="" type="radio"/> Policyholder

Other Plan Offerings

Section #	Section Description	Benefit Type	Contract Type	Assigned to
<input checked="" type="checkbox"/> 001	SMP GOLD 2520-2000 PD - Current	Medical, Dental	NU: Numbers <input type="text" value=""/>	<input checked="" type="radio"/> Policyholder + Assign Dependent(s)

[Back](#) [Next](#)

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.

Name	Relationship	Update
<input checked="" type="checkbox"/> All		
<input checked="" type="checkbox"/> James Smith	Child	

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.

Coordination of Benefits Information
Select and enter as much information as possible for this Policyholder and (if applicable) their Dependent(s).

Medicare
Does this Policyholder and/or their Dependents have existing Medicare coverage? *

No
 Yes, but I do not have the information at this time
 Yes, I have the information at this time

Existing Coverage
Does this Policyholder and/or their Dependents have other existing coverage? *

No
 Yes, but I do not have the information at this time
 Yes, I have the information at this time

Medicare Panel

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

- All fields are optional. The user may continue their process after filling out any field.
- Click the link to add additional Medicare coverage information.
- Click the trash can icon to delete the Medicare coverage record.

Medicare

Does this Policyholder and/or their Dependents have existing Medicare coverage? *

No

Yes, but I do not have the information at this time

Yes, I have the information at this time

Medicare Information

Person Covered

Reason for Medicare Coverage

Medicare Number

Medicare Part A Effective Date

Medicare Part B Effective Date

[+ Add More Existing Medicare Coverage](#)

Existing Coverage Panel

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

- All fields are optional. The user may continue their process after filling out any field.
- Click the link add additional coverage information.
- Click the trash can icon to delete the coverage record.

Existing Coverage Information

Person Covered

Insurance Company Name

Policy Number

Employment Status

Policy Type

Coverage Type

Expected End Date

Effective Date

Insurance Company Address

Address Line 1

Address Line 2

City

State

Zip Code

[+ Add More Existing Coverage](#)

STEP 5: REVIEW AND SUBMIT:

Review and submit the enrollment changes.

New Child
Joshua Smith

Event Dates Benefits Coordination **Review**

Review and Submit
Your Membership representative will review your enrollment submission to confirm the effective date. Currently your changes are expected to take effect on 02/01/2026.
Review your changes. If everything is correct, click Submit.

Event Information

Newborn, Adoption, or Legal Guardianship	Date of Birth or Legal Guardianship	Requested Effective Date
Newborn	02/01/2026	02/01/2026
Comments		
Newborn		

Dependent Information

First Name	Middle Name	Last Name	Relationship	Effective Date	Cancel Date	View
James - New		Smith	Child			View

Enrollment

New: 2026

Section #	Section Description	Entered Amount	Jacoby Becke Policyholder
001	SMP GOLD 2520-2000 PD	N/A	✓

Waived Offerings: Central

Current: 2026

Section #	Section Description	Entered Amount	Jacoby Becke Policyholder
001	SMP GOLD 2520-2000 PD	N/A	✓
000	ODC DENTAL	N/A	✓

Coordination of Benefits information

Medicare
The policyholder is not currently enrolled in any Medicare benefits.

Existing Coverage
The policyholder is not currently enrolled in any existing coverage benefits.

Required Form(s)
There are no required form(s) for this policyholder.

[Back](#) [Submit](#)

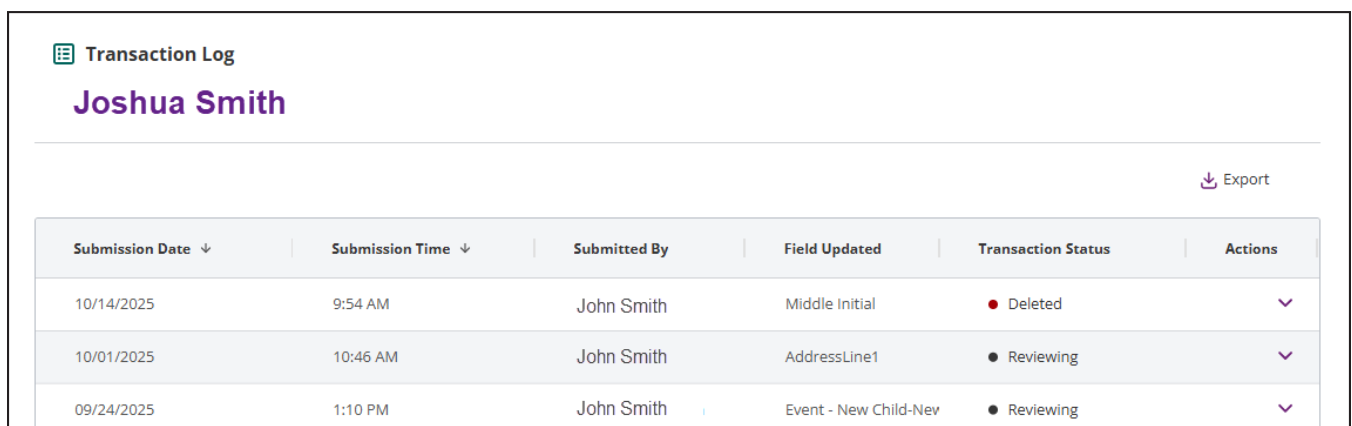
Transaction Log

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

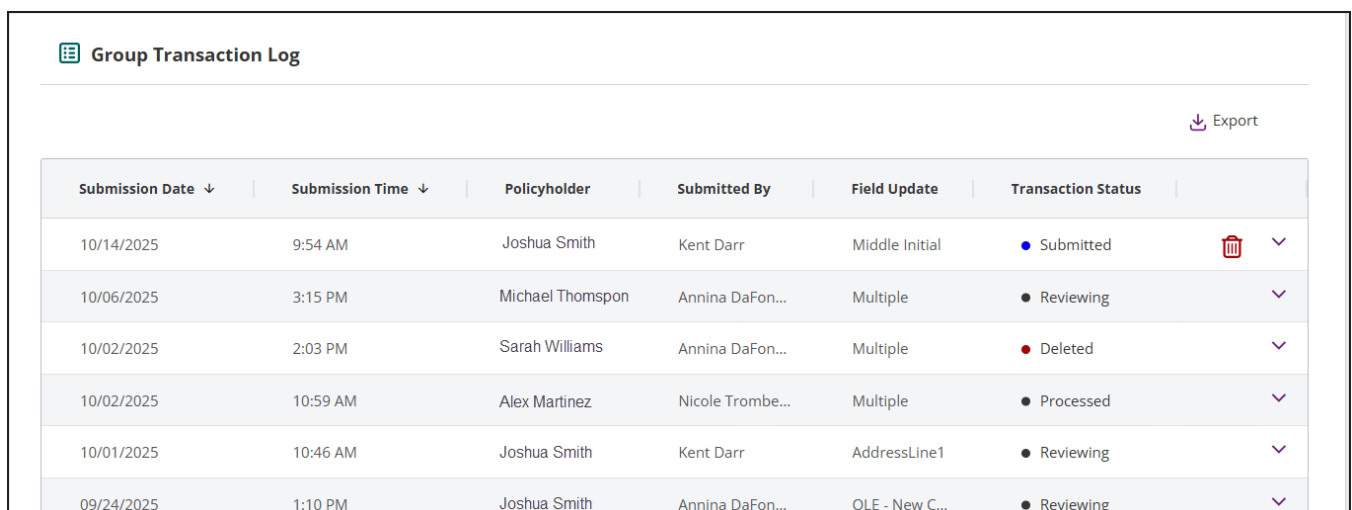
This log displays transactions specific to individual policyholders and their dependents. It's ideal for reviewing changes made to a single member's record, such as updates to coverage, demographic details or enrollment status. Users can monitor the status of each change and ensure it has been processed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



Submission Date ↓	Submission Time ↓	Submitted By	Field Updated	Transaction Status	Actions
10/14/2025	9:54 AM	John Smith	Middle Initial	● Deleted	⌵
10/01/2025	10:46 AM	John Smith	AddressLine1	● Reviewing	⌵
09/24/2025	1:10 PM	John Smith	Event - New Child-New	● Reviewing	⌵

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.








Submission Date ↓	Submission Time ↓	Policyholder	Submitted By	Field Update	Transaction Status	Actions
10/14/2025	9:54 AM	Joshua Smith	Kent Darr	Middle Initial	● Submitted	🗑️ ⌵
10/06/2025	3:15 PM	Michael Thompspon	Annina DaFon...	Multiple	● Reviewing	⌵
10/02/2025	2:03 PM	Sarah Williams	Annina DaFon...	Multiple	● Deleted	⌵
10/02/2025	10:59 AM	Alex Martinez	Nicole Trombe...	Multiple	● Processed	⌵
10/01/2025	10:46 AM	Joshua Smith	Kent Darr	AddressLine1	● Reviewing	⌵
09/24/2025	1:10 PM	Joshua Smith	Annina DaFon...	QLE - New C...	● Reviewing	⌵





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

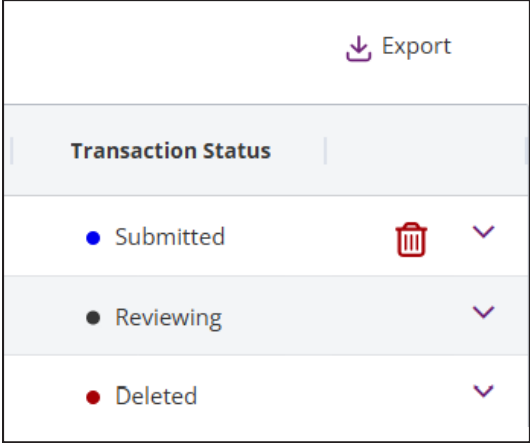
	Submitted	The manual change request has been submitted and can still be deleted.
	Reviewing	The manual change request is currently under review.
	Completed	The manual change request has been successfully completed.
	Deleted	The manual change request has been deleted/removed and will not be submitted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

- Navigation Menu** - Each row represents a different transaction. The transaction status represents where the transaction is in the review process.
- Export Button** - Exports the log into an Excel file.
- 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

BrightPath Solutions
Group Number: 123456 > Invoices

Dashboard | Roster | Claims | Invoices | Transaction Log | Manage Users

Account Overview
Account information is updated periodically and may not reflect recent transactions, including additional fees or pending payments. You can select up to 5 bill groups to make a one time payment.

	Bill Group	Current Invoice Number	Current Due Date	Current Invoice Amount	Bill Group Balance Due	Status	Payment Actions
<input checked="" type="checkbox"/>	316	345678989	05/01/2026	-\$0.01	\$1,433.94	Past Due	Enroll AutoPay
<input type="checkbox"/>	320	[blurred]	05/01/2026	\$0.00	\$914.60	Past Due	Enroll AutoPay
<input type="checkbox"/>	321	[blurred]	05/01/2026	\$0.00	\$1,508.16	Past Due	Enroll AutoPay
<input type="checkbox"/>	323	[blurred]	05/01/2026	\$0.00	\$2,258.58	Past Due	Enroll AutoPay
<input type="checkbox"/>	216	[blurred]	07/01/2024	\$0.00	\$0.00	Paid	Enroll AutoPay

Filter Bill Group [dropdown] [Make a Payment](#)

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.

	Bill Group
<input checked="" type="checkbox"/>	316
<input checked="" type="checkbox"/>	320
<input checked="" type="checkbox"/>	321
<input checked="" type="checkbox"/>	323
<input checked="" type="checkbox"/>	216
<input type="checkbox"/>	217

Different Payment Amount

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

Bill Group	
<input checked="" type="radio"/>	500
<input type="radio"/>	600

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.

Invoice History

Invoices can be viewed from the past 24 months, if available.

Bill Group	Invoice Number	Date Generated	Due Date	Amount Due	Status	Remaining Balance	Payment Details
323	345678989	04/14/2026	05/01/2026	\$1,194.29	Past Due	\$1,144.29	View
316		04/08/2026	05/01/2026	\$766.01	Past Due	\$750.01	View
320		04/08/2026	05/01/2026	\$924.60	Past Due	\$914.60	View
321		04/08/2026	05/01/2026	\$1,548.16	Past Due	\$1,508.16	View
323		03/18/2026	04/01/2026	\$1,194.29	Past Due	\$1,114.29	View

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.

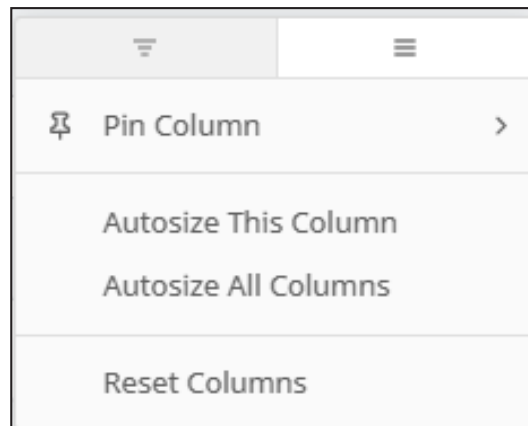
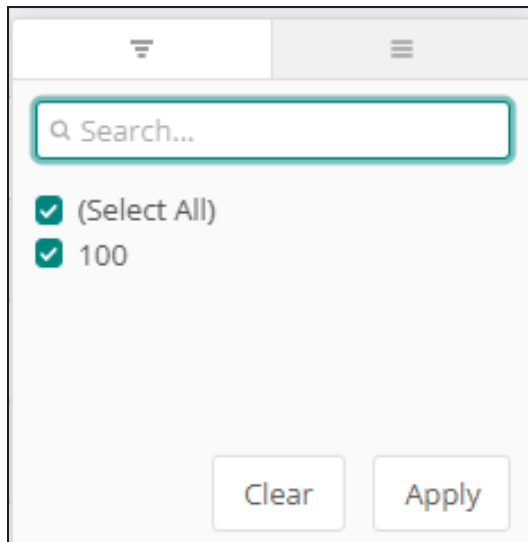
Click the link to open a pop out with details about payments that were made to this invoice, including:

- 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.

Medical Mutual My Groups | Log Out

BrightPath Solutions

Dashboard | Roster | Claims | Invoices | Transaction Log | Manage Users

Group Number: B13655 > Invoices > Invoice Details: 304123456

Invoice Details

Invoice Number:
304123456

Group Number
B13655

Bill Group
100

Date Generated
06/04/2024

Invoice Due Date
07/01/2024

Coverage Period
07/01/2024 to 08/01/2024

Address
BRIGHTPATH SOLUTIONS
JOHN SMITH
100 EAST STREET
CLEVELAND, OH 44110

Billed Amount Due: \$130,267.33

[Export](#) [Download PDF](#)

This amount is based on the invoice generated on 06/04/2024 and is not real time. This may not reflect additional fees, late fees or any payments made.

Invoice Summary for 07/01/2024

Current Amount	Total Adjustments ⓘ	Other Fees & Taxes	Billed Amount Due
\$126,463.29	\$3,804.04	\$0.00	\$130,267.33
Administration Fee	Return Item Fee	Late Fee	
\$0.00	\$0.00	\$0.00	

Adjustments: \$3,804.04

These changes are for this invoice period only, and includes any additions, changes to a plan, or cancellations. Any changes made after the date billed will not appear on this invoice.

 [Export](#)

Section Number	Name	Policyholder ID	Contract Type	Effective Date
001	Chen, David	608123456654	Single	05/01/2024
001	Chen, David	608123456654	Single	05/01/2024

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.

Adjustments: \$3,804.04

These changes are for this invoice period only, and includes any additions, changes to a plan, or cancellations. Any changes made after the date billed will not appear on this invoice.

Search Adjustments

Export

Section Number	Name	Policyholder ID	Contract Type	Effective Date
001	Chen, David	608123456654	Single	05/01/2024
001			Single	05/01/2024
002			Single	05/01/2024
002			Single	05/01/2024
800			Single	05/01/2024
800			Single	05/01/2024
801			Policyholder + Children	05/01/2024
801			Policyholder + Children	05/01/2024

Page Size: 10 1 to 8 of 8 records Page 1 of 1

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 cancellations.

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 cancellation.

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.

Current Enrollments: \$126,463.29

View or search for your policyholders. Changes made after the date billed will not appear on this invoice.

Search Current Enrollments

[Export](#)

Number	Name	Policyholder ID	Contract Type	Amount Due
	Chen, David	608123456654	Single	\$1,870.46
	Chen, David	608123456654	Single	\$5.78
	Chen, David	608123456654	Single	\$4.25
	Chen, David	608123456654	Single	\$0.63

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.			
<hr/>			
Single:	391	Family:	22
2 Person Adult:	18	Policyholder + Children:	16
Policyholder + 1 Child:	4		



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