HEALTH BENEFITS PORTAL

User Guide

Your Essential Guide to the Health Benefits Portal. A comprehensive resource designed to simplify managing your health benefits. It offers step-by-step instructions, practical tips, and detailed insights, empowering you to access resources, make informed decisions, and navigate the portal effortlessly—all in one convenient location.

800.223.4590 | unitedag.org/healthportal | enrollment@unitedag.org

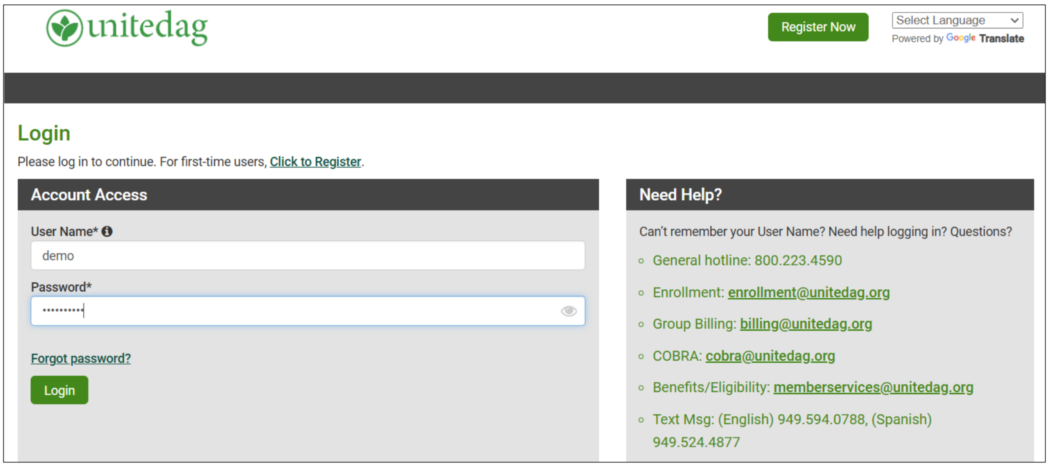
Table of Contents

1. Introduction

The Client Portal is used by clients (human resources, benefits managers, service representatives, and plan administrators). According to your access-level a variety of features are enabled.

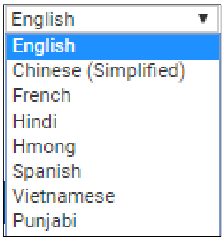
2. Login to Client Portal

1. Go to: https://portal.unitedag.org/Logon/
2. Enter **User Name** and **Password** and click the **Login** button to login to client portal.
    - This should be your UnitedAg-issued user name.
    - The Register Now option is intended for Employees and their Dependent participants.
3. Tabs and portal features will be displayed based on your eligibility and access.
4. To exit the Client Portal: Click the **Log Out** link on the top right.

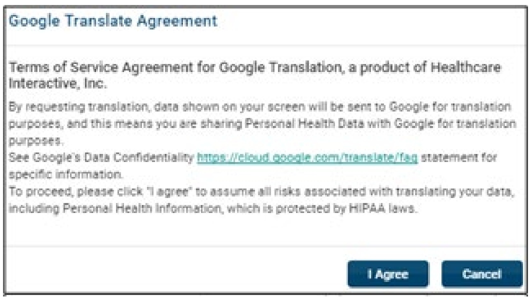


2.1 Multilingual Translation

Multiple language translation is supported using Google Translate. By default, English is selected. If you need access in a language other than those shown, please notify us at: enrollment@unitedag.org.

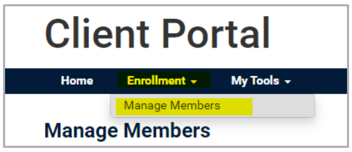


Before logging in, choose the desired language on the top right. When you choose any other language for the first time, you need to accept the Google Translation Agreement shown below:



3. Enrollment Menu: Manage Members

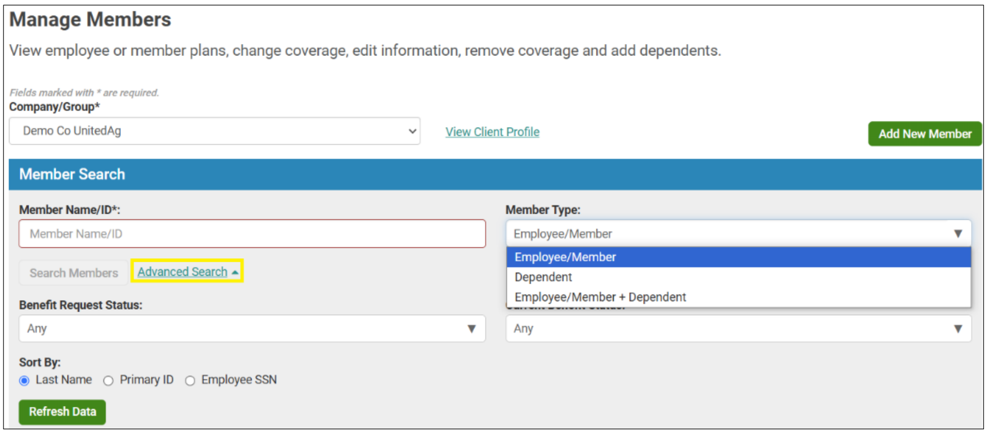
The HR representative of any organization can maintain, manage, add, and make corrections to employees and their dependent(s)' Enrollment-related information, view benefit history, and more.



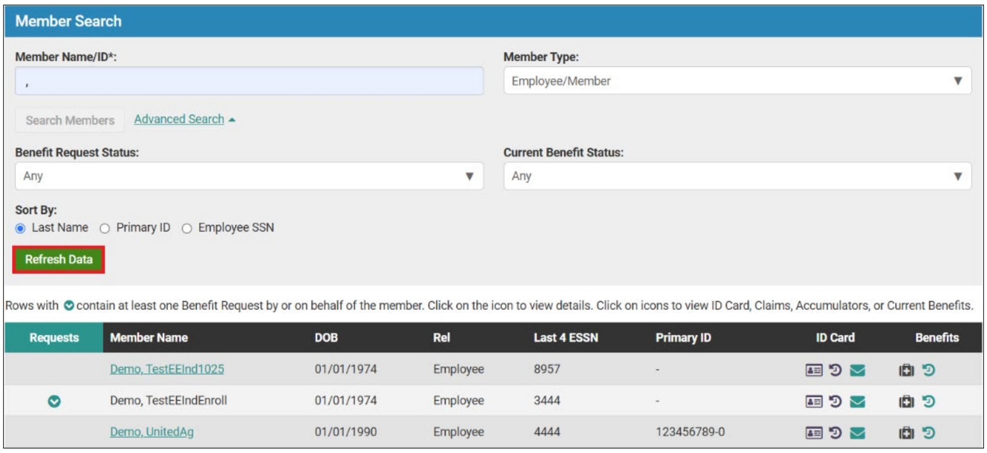
3.1 Search Members

You can search for members using required filter criteria:

1. Select the **Company/Group** from the dropdown list to search for members within that Company/Group.
    a. ***NOTE:** In **View Client Profile**,* you'll see the Group's demographic information, including **Renewal Month**, **Open Enrollment Month**, and plan **Waiting Period**.
2. Enter **Member Name, ID#** to find a specific person or input a ","(comma) to view All.
3. Optional: *In **Advanced Search**,* you can filter by **Member Type**, **Benefit Request Status** and **Current Benefit Status**.
    a. ***NOTE**: To search for Dependents / Spouses, you must change the Member Type to include these individuals.*
    b. ***NOTE**: Choose **Sort By** option: Last Name, Primary ID or Employee SSN.*



4. Click the **Search Members** button and the result will be displayed as shown below. Use the **Refresh Data** button to update the results after changing the filter criteria:



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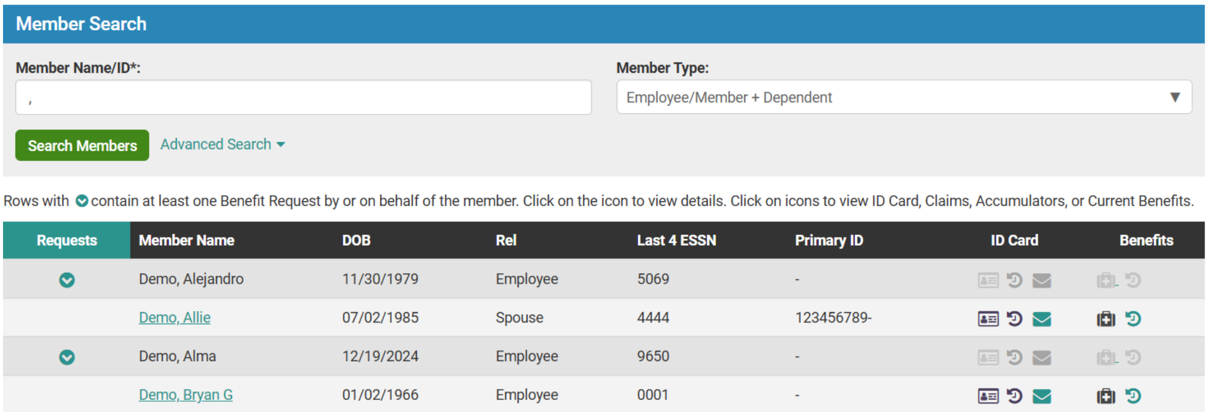
3.2 Member Action Items

Within the results table, there are a series of actions you can easily perform at-a-glance.

In **Search Result** grid:



Member Search

Member Name/ID*: ,

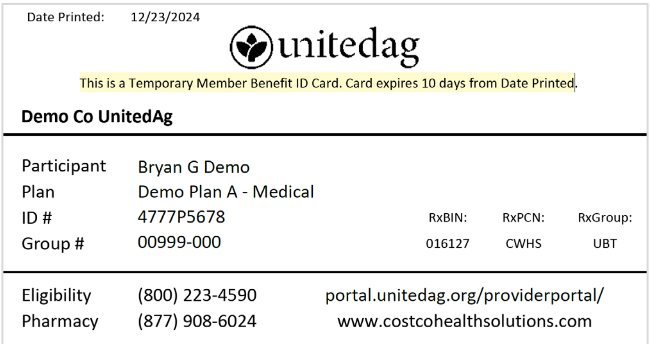
Member Type: Employee/Member + Dependent

Search Members | Advanced Search

Rows with contain at least one Benefit Request by or on behalf of the member. Click on the icon to view details. Click on icons to view ID Card, Claims, Accumulators, or Current Benefits.

Requests	Member Name	DOB	Rel	Last 4 ESSN	Primary ID	ID Card	Benefits
	Demo, Alejandro	11/30/1979	Employee	5069	-		
	Demo, Allie	07/02/1985	Spouse	4444	123456789-		
	Demo, Alma	12/19/2024	Employee	9650	-		
	Demo, Bryan G	01/02/1966	Employee	0001	-		

- **Member Name** = A blue clickable underlined link, will take you to a) view member details and enrollment history or, b) begin an enrollment request.
- **DOB** = Date of birth of the member.
- **Rel (abbreviation for Relation)** = The relationship of member: Employee, Spouse, Domestic Partner, or Dependent for children.
- **Last 4 ESSN** = The last 4 digits of employee's SSN number.
- **Primary ID** = Unique ID of member.
- **ID Card** = When this column is greyed out, it means the member profile is not finalized.
    - **Card icon** = Download a digital ID card
        - **NOTE:** A temporary card will be downloaded if a digital copy of the physical card is not available yet.



Date Printed: 12/23/2024

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This is a Temporary Member Benefit ID Card. Card expires 10 days from Date Printed.

Demo Co UnitedAg

Participant	Bryan G Demo			
Plan	Demo Plan A - Medical			
ID #	4777P5678	RxBIN:	RxPCN:	RxGroup:
Group #	00999-000	016127	CWHS	UBT

Eligibility	(800) 223-4590	portal.unitedag.org/providerportal/
Pharmacy	(877) 908-6024	www.costcohealthsolutions.com

    - **Counterclockwise icon** = View portal ID request history
    - **Envelope icon** = Request mailed ID card
        - **NOTE:** UnitedAg will prioritize the Employer Group's preferred delivery method if they've designated all fulfilled ID requests be mailed to their business address.
- **Benefits** = When this column is greyed out, it means the member profile is not finalized.
    - **Suitcase icon =** View the Current Benefit Summary of member. Option to print page as a certificate of coverage. Please refer to section 3.3 Benefits Views for more details.
    - **Counterclockwise icon** = View member's benefits history (limited to portal submitted changes).

A downward arrow will be displayed next to the members' names if an open/pending request exists. Clicking the arrow will display the request's basic details.

In **Request Details** grid:

Requests	Member Name	DOB	Rel	Last 4 ESSN	Primary ID	ID Card	Benefits
	Demo, Hugo	02/10/1989	Employee	7777	-		

Request Details	Source	Type	Status	Action
Ref ID: 24-00131	Member	Open Enrollment	In-Progress	
Ref ID: 24-00146	Member	Marriage/Domestic Partnership	Requires Approval	

- **Request Details** = Reference ID/Project ID#
- **Source** = Client or Member portal from where request is submitted.
- **Type** = Event Type, such as: marriage, divorce, birth of child, etc.
- **Status** = Status of enrollment request for the member

UnitedAg will review the request submission and will either: Approve, Deny, or Return to Sender for additional information, if applicable. Email notifications to the portal user will communicate these review results.

Benefit request - Approval

From noreply@unitedag.org <noreply@unitedag.org>
Date Fri 11/15/2024 11:25 AM
To your_registered_email_address

Bryan Demo
984 Premium Ct
Anaheim, California 92806

Dear Bryan,

Your Benefit Enrollment request has been received and approved. Please review the information below and contact us immediately if you believe anything is incorrect.

Life Event: Termination of Benefits

Submission Date: 11/15/2024

Reviewer Notes: Approved term eff 12/1/2024

Employee Demographics

First	MI	Last	DOB	Gender
Bryan	G	Demo	01/02/1966	M

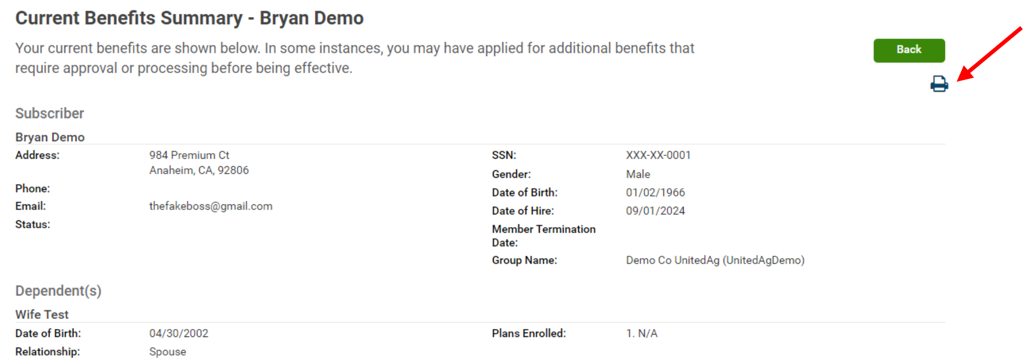
3.3 Benefits Views

The Benefits window shows the current benefit summary of the member, along with their dependent enrollments. Click the **suitcase** icon under the **Benefits** header.

Rows with contain at least one Benefit Request by or on behalf of the member. Click on the icon to view details. Click on icons to view ID Card, Claims, Accumulators, or Current Benefits.

Requests	Member Name	DOB	Rel	Last 4 ESSN	Primary ID	ID Card	Benefits
	Demo, Alejandro	11/30/1979	Employee	5069	-		
	Demo, Allie	07/02/1985	Spouse	4444	123456789-		
	Demo, Alma	12/19/2024	Employee	9650	-		
	Demo, Bryan G	01/02/1966	Employee	0001	-		

The Current Benefits Summary displayed below can be printed as proof of coverage (aka a certificate of coverage).



Current Plan details are displayed in the table below. **Benefits History** will show benefit changes submitted via the portal (NOTE: It will not reflect changes submitted via email for manual processing). Any Plan documents uploaded will display a **View** button for downloading.

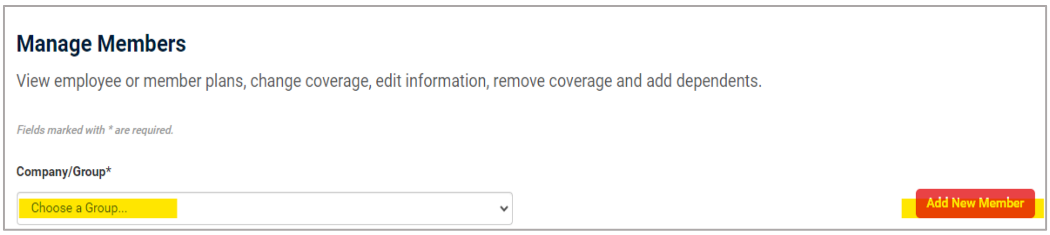
Plans Benefits History

Product	Plan Name	Coverage Level	Original Eff Date	Tier Effective Date	Term Date	Documents
Medical	Demo Plan A - Medical	Employee + Spouse	12/01/2024	12/01/2024		View
Pharmacy	WAIVE Rx	Employee + Spouse	12/01/2024	12/01/2024		N/A
Dental Insurance	WAIVE Dental	Employee + Spouse	12/01/2024	12/01/2024		N/A
Dental Insurance	Demo Plan B - Dental	Employee Only	12/01/2024	12/01/2024		N/A
Vision Insurance	WAIVE Vision	Employee + Spouse	12/01/2024	12/01/2024		N/A

4. Adding New Employee Members

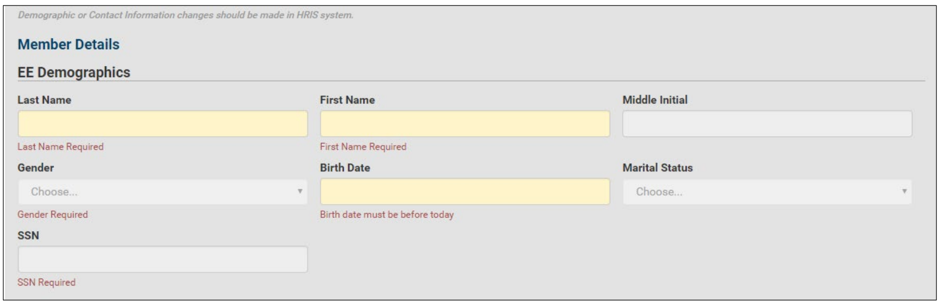
4.1 Add the Member

Under **Manage Members**, Select the **Company/Group** of where to add the member. Click the **Add New Member** button on the top right. This will add a new member to the selected Company/Group.



4.2 Employee Demographics

Enter member demographics details as shown below (required fields are noted in Red):



EE Demographics

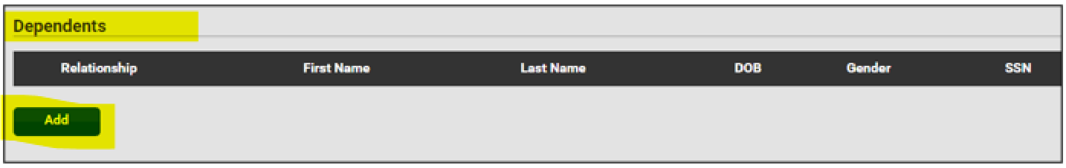
- Last Name
- First Name
- Middle Initial (not required)
- Gender
- Birth Date
- Marital Status (not required)
- SSN

EE Contact Info

- Address1
- Address2
- City
- State
- Zip Code
- Phone
- Personal Email

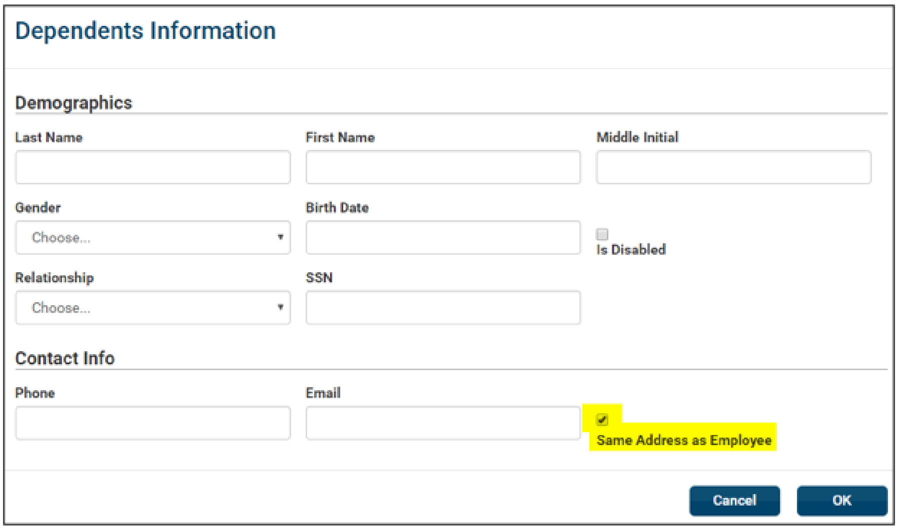
4.3 Add Dependents

In the **Dependents** section, click the **Add** button to add one or more dependents.



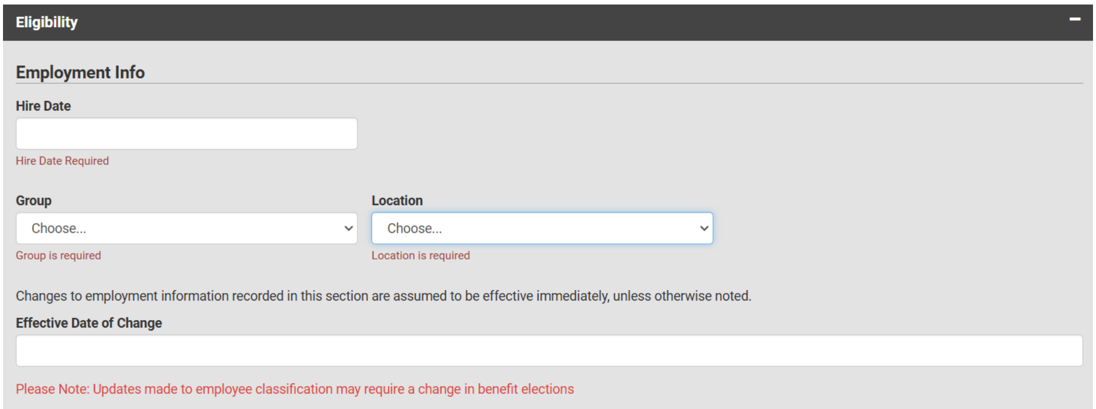
Enter Dependent demographics details as shown below.

- Uncheck the box, 'Same Address as Employee,' to enter a different address for the dependent.



4.4 Eligibility

The initial Employment information of the member is collected here; this may differ from their benefit qualifying event. (Example: The initial hire may be a Part-Time hire date, but the election event type after turning Full-Time Status would be New Eligible)

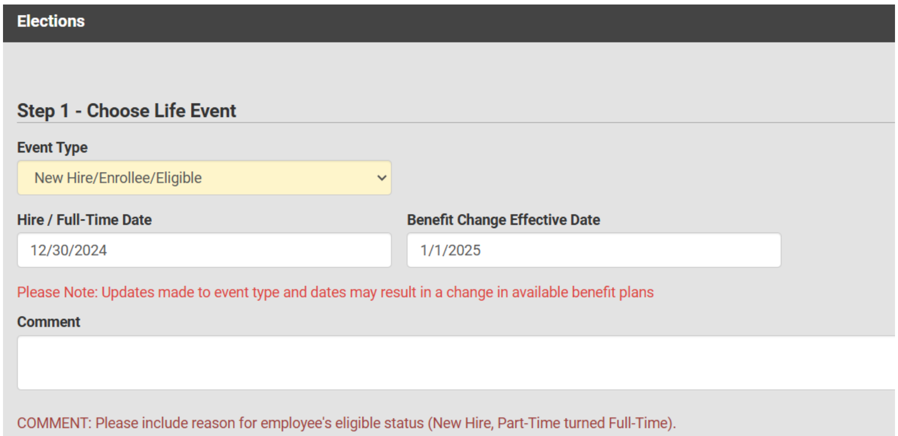


The Eligibility fields will determine what benefits an employee is eligible for, and which plans display for the Elections section.

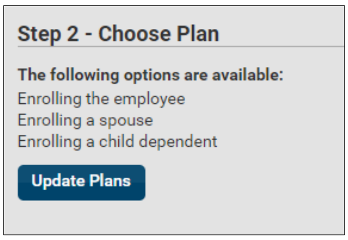
4.5 Benefit Elections

Elections is used to add Qualifying Life Events (QLE) and enroll/waive plans.

- **Step 1 - Choose Life Event** – Select the Event Type (New Hire, Rehire, Marriage etc.), then provide the **Event Date**, which is the date when the actual life event took place. An example is shown below. Comment notes & Disclaimers will display in Red depending on the Event Type selected (if displayed, the Comment is a required field)

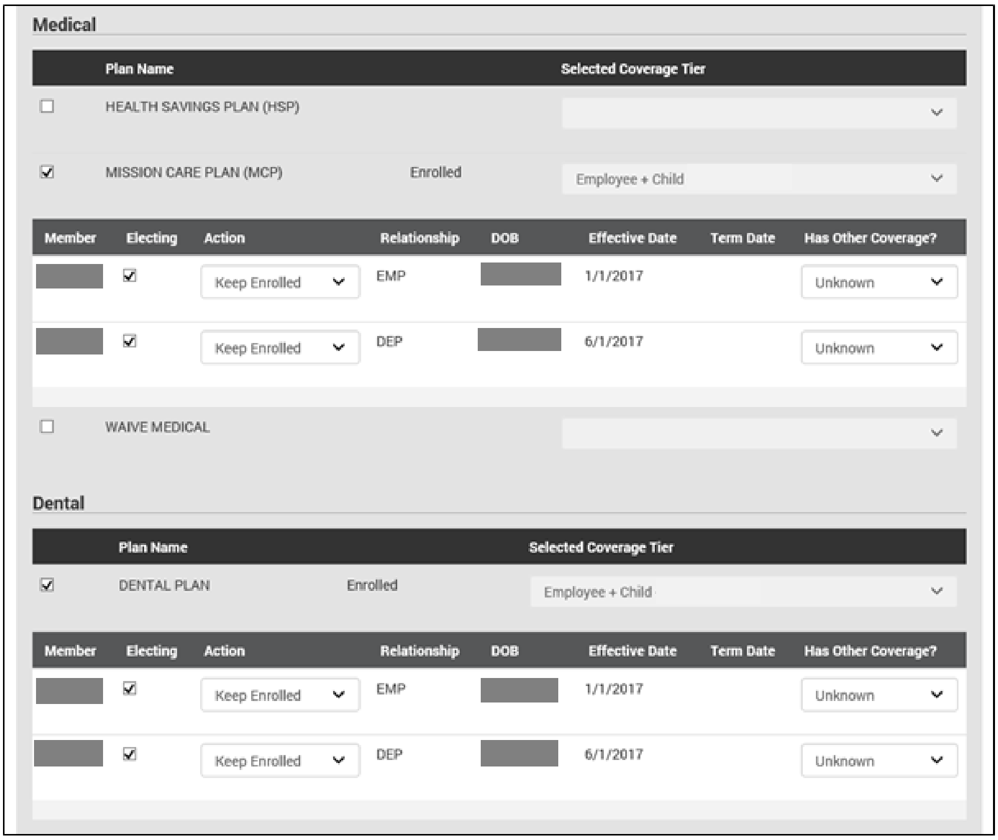


- **Step 2 - Choose Plan** - The options available for the selected Event Type & member are displayed. To refresh the plans, click **Update Plans**.



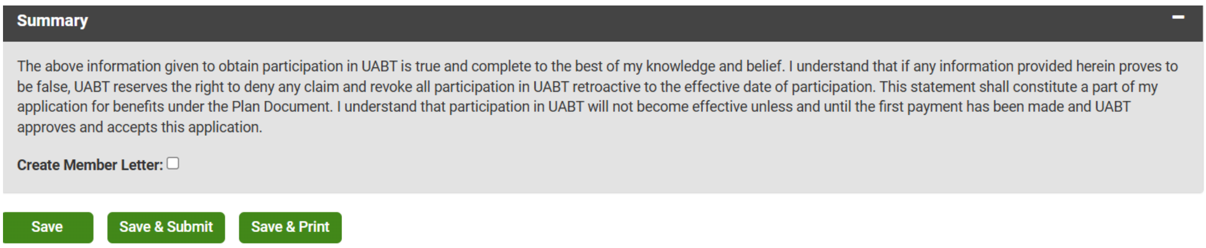
A list of plans available for enrollment now display. Plans will only show for which the current employee is eligible. Plans that are pre-checked means the member is currently enrolled in them, or, they may be required plans for a first-time enrollment.

a. Enroll in a plan by checking the box next to the plan name. In the example below for Medical, Mission Care Plan (MCP) is checked. (**REMINDER:** UnitedAg plans are bundled packages.) Now check the names of family members to enroll in the plan. **NOTE:** The Tier will be auto-calculated.
   - For Medical, if you wish to **Waive Medical** coverage, please check the box next to Waive Medical. This is for ACA reporting purposes.
   - Other benefits are shown as you scroll down.



4.6 Summary

Displays information regarding finishing the request. Review your Member, Dependent, and Benefit Elections.



- Click the **Check here if you will be attaching additional documentation** checkbox (not shown in this example) if you are attaching additional documents.

- *For some Event Types*: Click on the **Create Member Letter** box if you wish to produce a form letter with the new member's enrollment acknowledgement.

Hello «FirstName»,

Welcome to the Member Portal.

Your enrollment in benefits is complete!

Visit the Member Portal and follow the Registration instructions below to review your benefits and access information and tools that allow you to manage your benefits.

The portal gives you access to your Health and Wellness Benefits, all in one location
  - View Your Benefits
  - View Claims, Deductibles, Explanations of Benefits
  - Print ID Cards
  - Visit the Document Library providing Benefit Summaries, Forms and Links to important websites

Sincerely,

Your Benefits Team

Member Portal Registration Instructions

1. Visit https://portal.unitedag.org and click the **Register Now** button at the top right.
2. Enter your name, date of birth and your **ID Number (as it appears after "UBT"): «RegistrationID»**
3. Click **Submit**, and then follow the online instructions to create your username and password.

  a. The member (employee/dependent) can use this letter to register for access to the member portal.
  b. The letter can be found under **My Tools** -> **Activities**.
  c. NOTE: it may take several minutes before the letter appears in Activities.

- Click the **Save & Submit** for processing.
- Click the **Save** if you do not want to process at this point – you can come back later and complete the task.
- Click **Save & Print** to print the plan details after saving it.
- If you choose to **Save & Submit**, you will be navigated to the following page:
  Click the **View all pending request** link to view the pending request in the Activities tab. The newly added member will be displayed in Manage Members grid as shown below:

Enrollment

Manage member, dependent, and benefit enrollment details.

Request Submitted

Thank you. This request has been received and is being processed. Please allow 3 business days for our systems to reflect this update.

Your confirmation number is **WebME-2017-15278**. You can use this number when corresponding about this transaction.

View all pending requests

Requests	Member Name	Impersonate	DOB	Rel	Last 4 ESSN	Primary ID	ID Card	Benefits
	Demo, Alejandro		11/30/1979	Employee	5069	-		

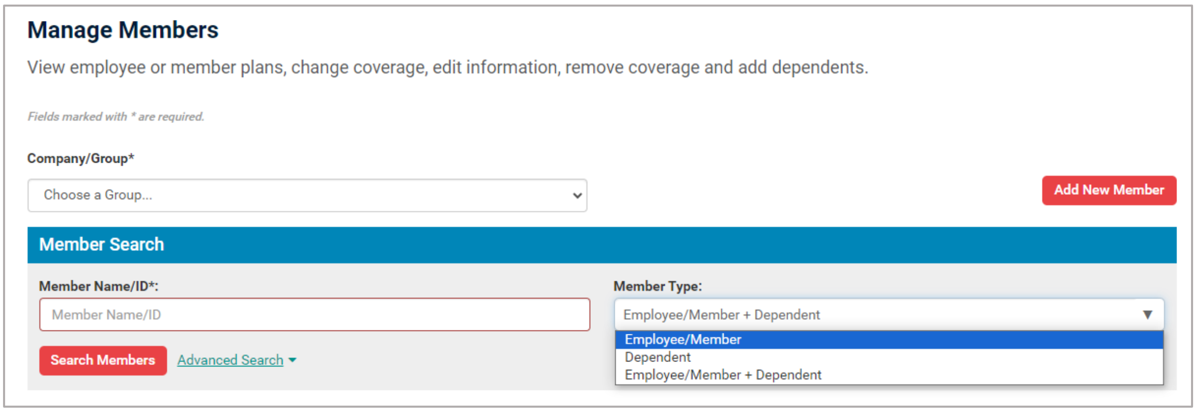
Request Details	Source	Type	Status	Action
Ref ID: 24-00159	Client	New Hire/Enrollee/Eligible	In-Progress	

5. Make Changes to Member details

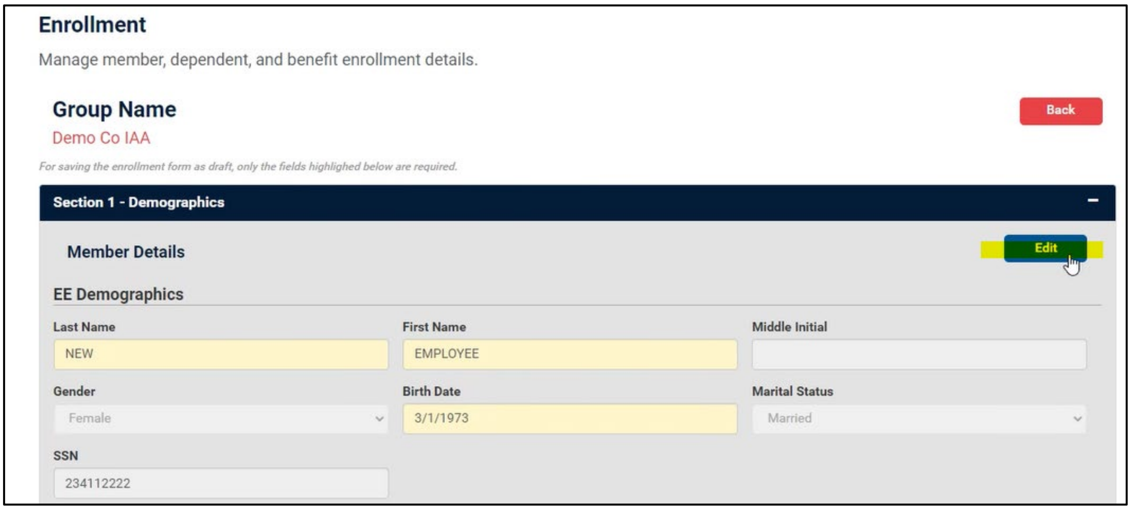
To edit details of any added members and events which include: demographic changes, qualifying life event changes, open enrollments, new hire / newly benefit eligible, terminations, corrections.

5.1 Search for the Member.

In **Manage Members**, Select the **Company/Group**, and enter part of the Employee's name and click the **Search Members** box.



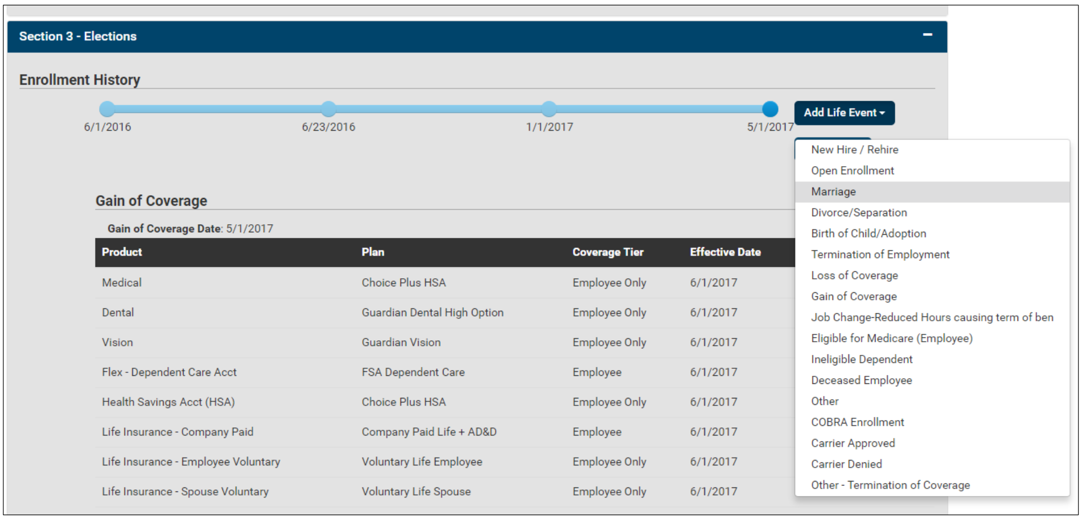
1. Click on the employee name in the results section.
2. Click **Edit** to edit the field details.
3. To add dependents, click the **Add** in the **Dependents** section. To edit dependent, click on the dependent's name and edit the required details.

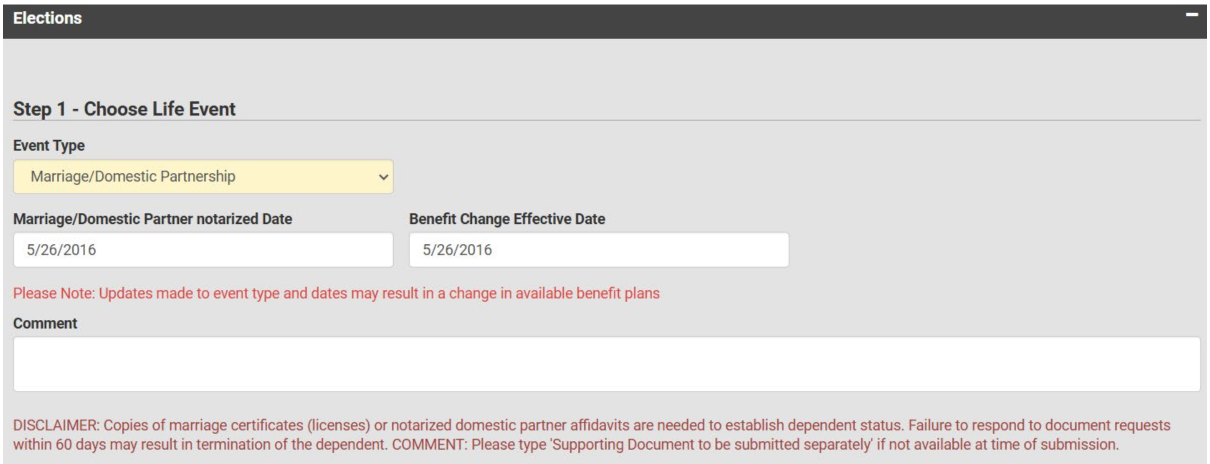


4. Scroll to bottom of the page and click the **Save & Submit** button. You will get a pop up that indicates you have not made any enrollment changes to the plan. Click **OK**.

5.2 Add or make QLE changes for any added member

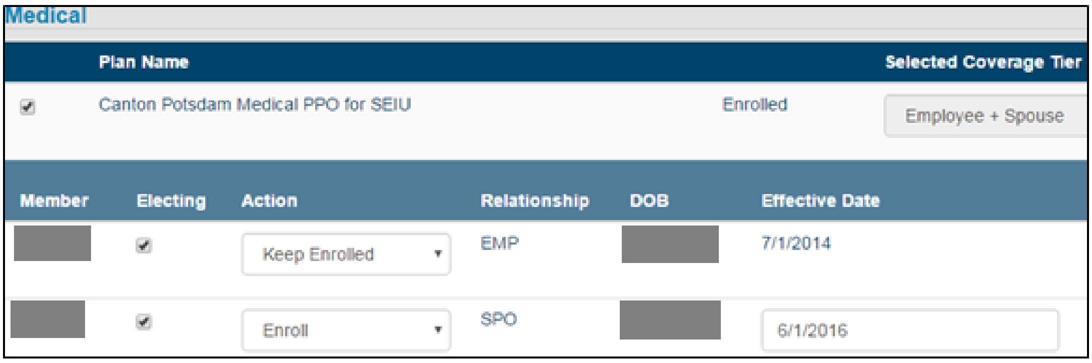
1. Add/ Edit dependents if needed.
2. Change **Eligibility** fields if needed. If you change eligibility fields you will need to click on **Update Plans** to display the correct plans based on the new eligibility.
3. In **Elections**, click the **Add Life Event** button.





- Enter **Event Date**.
- Enter **Benefit Change Effective Date** (this date will be applied as the Effective Date to all benefits; this date will auto populate based on the system rules).
- Enter **comments/notes** if needed.

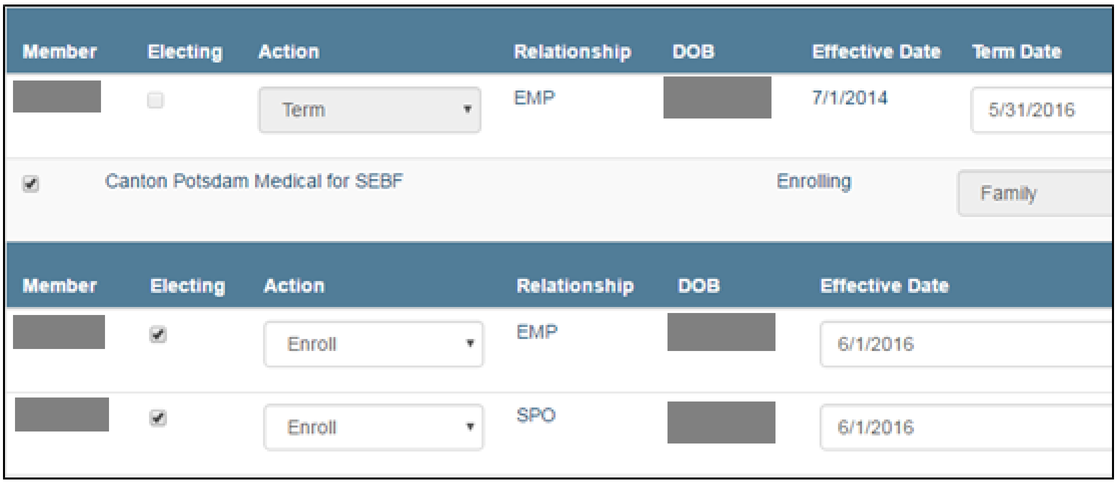
4. Select the plan you want to enroll the member/dependent into:
   - If adding to existing plan, the box next to the plan will already be checked.
     a. To add a dependent, check the box next to the dependents' name to enroll them.
   - The "Action" field will now indicate Enroll and the Coverage Tier will auto adjust.



   - If adding both member and dependents into a new plan:
     a. Check the box next to the new benefit you are enrolling them in.

b. Check the box next to the dependent name to enroll them in the plan.

- The prior plan will terminate



a. Change **Effective Date** and **Term Date** if you wish to override it.
b. Repeat steps for each benefit you are enrolling member/dependent into.

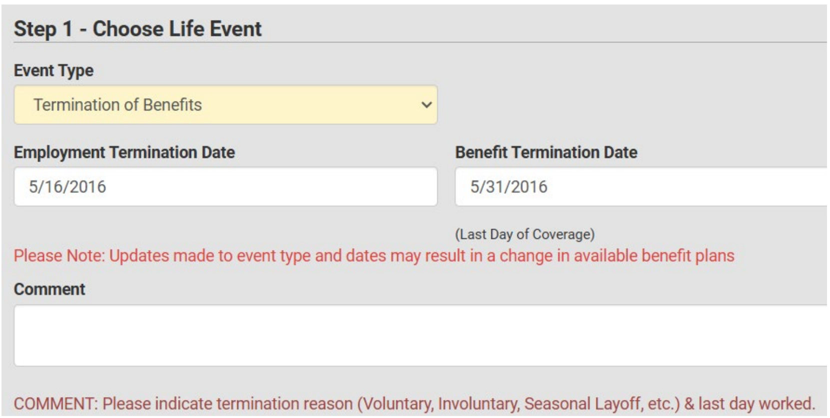
- Click the **Save & Submit** for processing.
- Click the **Save** if you do not want to process at this point – you can come back later and complete the task.

6. Termination of Employment

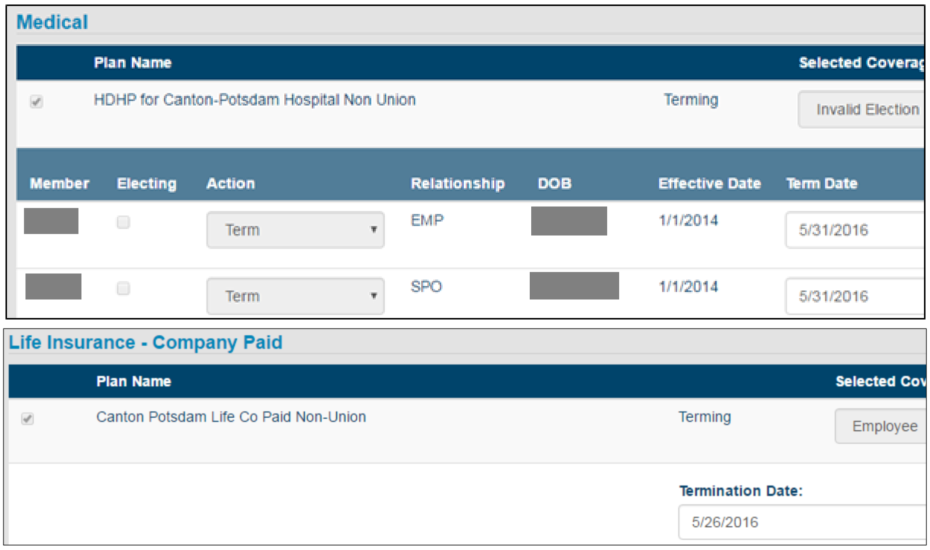
When any member resigns or is terminated from the organization, you need to delete the member details from the portal. It will remove the member details and benefits from selected date.

Follow below steps to terminate the employment of any member:

1. Search for the Member under the correct Company/Group
2. Go to **Elections**, click the **Add Life Event** button.
    - **Event Type** = Termination of Employment (see list for other term reason options).
    - Enter **Emp Term Date.**
    - Enter **Benefit Termination Date** (this must be the last day of the month of coverage).
    - Enter **Comments/ notes**, if needed.
    - Choose **Plan**. All plans will be terminated.



3. Change **Term Date** if you wish to override it.



4. Click **Save & Submit** for processing.
5. Click **Save** if you do not want to process at this point. You can come back later and complete the task.

7. My Tools

My Tools section contains a variety of tools where users can view activities and documents related to the logged in user.

It has the following sub tabs:

- Activities
- My Documents
- My Web Links

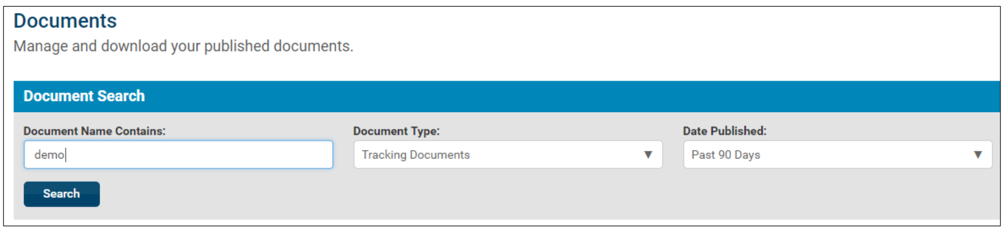
7.1 Activities

Where users may see the progress of submitted tasks.

- Activities tab allows the logged in user to view the tasks in various stages. The Activities are categorized into three sections: In Progress, In Progress with another collaborator and Completed.
- You can apply the filter with **Activity Name**, **Created Date**, and **Person/ Group** fields to search for particular activity. Click the **Clear Filter** button to clear any applied filter.

7.2 Documents

My Documents tab helps you download plan documents and invoices. You can also search the documents using **Document Name**, **Document Type** and **Date Published** filters.



Filtered documents will be displayed as shown below:

Published Documents

Document Name	Document Owner	Date Published	Type	Format	Action
Unfiled					
IT Project Management Summary @10/27/2017	HCI Group - PM Leads	10/27/2017	Unfiled	application/pdf	
IT Project Management Summary @11/03/2017	HCI Group - PM Leads	11/03/2017	Unfiled	application/pdf	
IT Project Management Summary @10/30/2017	HCI Group - PM Leads	10/30/2017	Unfiled	application/pdf	

In grid, documents are grouped by **Document Types**. You can expand or collapse the group by clicking on a group name. Click on arrow to apply the sorting on document list.

- **Document Name** is a name of the document.
- **Document Owner** shows the Employer Group associated with the document.
- **Date Published** shows the portal published date of the document.
- **Type** shows the document type.
- **Format** shows the format (excel, word, pdf) of a document.
- Click the **Download** icon to download the document.

Choose the **Company** from the drop-down list to view the published/uploaded documents as shown below:

Published Documents

View, manage, upload, download, and publish documents to Member Portal.

Company/Group*

A-1 Limousine

Documents for Selected Company/Group

Document Name	Related To
Legal/Contracts	
HCI Order Form for IHP-GBS-signed	A-1 Limousine
Plan Documents	
A-1 Limousine High Plan 1-1-2017	A-1 Limousine
Guardian Dental Benefit Summary	A-1 Limousine

7.3 Web Links

Here you can find links to most commonly-used resources to manage the health benefits for your members.

Published Health Plan Web Links

Link Name	Link Owner	Description
(Benefit) myStrength	UnitedAg	A full-spectrum, stepped care approach to mental health support to help manage sleep, stress, anxiety and much more. Connect with a licensed therapist of choice by appointment and 7 days/week from the comfort of home.
(Network) Teladoc	UnitedAg	Your telemedicine/telehealth network. UnitedAg members' covered employees and their dependents can schedule telephone consultations or online video chat with U.S. board-certified physicians and pediatricians, and talk to them within minutes!
(Benefit) Health & Wellness Clinics	UnitedAg	Our clinics are open to all UnitedAg members' covered employees and dependents, offering a full range of services. With six regional clinics located in Santa Maria, Visalia, Turlock, Salinas, Chico and Colusa, some clinics are available weekends and offer bilingual teleconsultations for patients who need to talk with a doctor on their own time. Walk-in visits are accepted. (Use the link to find locations & available hours.)
(Resource) Employer Resource Packet	UnitedAg	A packet of frequently used forms and informational materials to help manage your health benefits.
(Tool) Contribution Payment Portal	UnitedAg	For scheduling online monthly contribution payments (One-time, Recurring and Auto-Pay)

Previous 1 2 Next