



# 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.



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## 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

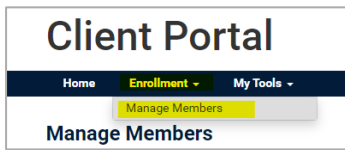
Multiple language translation is supported using Google Translate. By default, English is selected. If you need access in a language other than those shown, please notify us at: [enrollment@unitedag.org](mailto:enrollment@unitedag.org).



**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

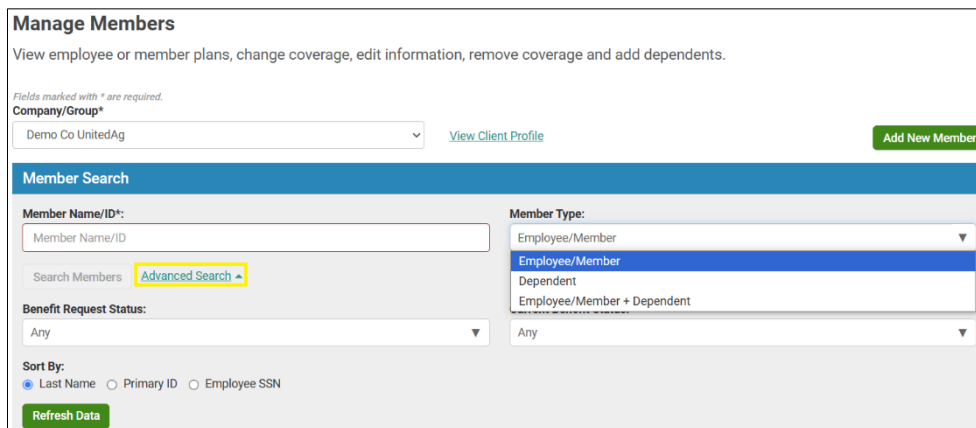
The HR representative of any organization can maintain, manage, add, and make corrections to employees and their dependent(s) Enrollment-related information, view benefit history, and more.



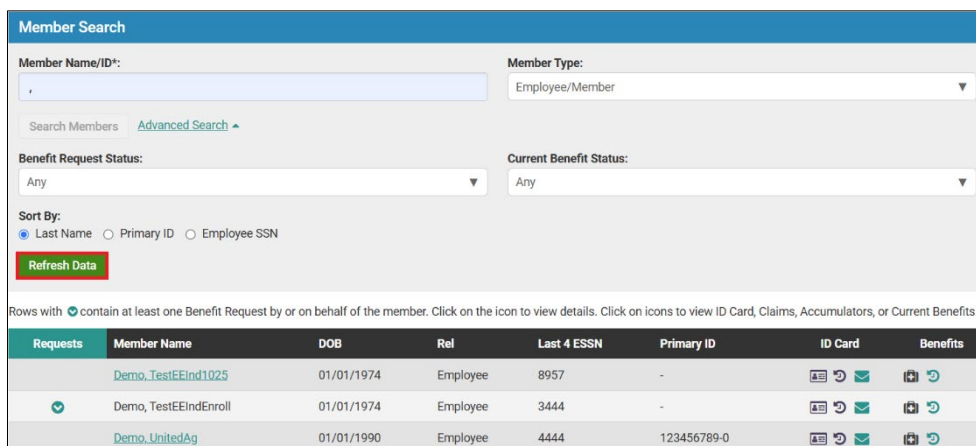
#### 3.1 Search Members

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:



Requests	Member Name	DOB	Rel	Last 4 ESN	Primary ID	ID Card	Benefits
	Demo_TestIEInd1025	01/01/1974	Employee	8957	-		
	Demo_TestEEIndEnroll	01/01/1974	Employee	3444	-		
	Demo_UnitedAg	01/01/1990	Employee	4444	123456789-0		



### 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
	<a href="#">Demo, Alejandro</a>	11/30/1979	Employee	5069	-	📄 🔄 ✉️	👜 🔄
	<a href="#">Demo, Allie</a>	07/02/1985	Spouse	4444	123456789-	📄 🔄 ✉️	👜 🔄
	<a href="#">Demo, Alma</a>	12/19/2024	Employee	9650	-	📄 🔄 ✉️	👜 🔄
	<a href="#">Demo, Bryan G</a>	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

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

Demo Co UnitedAg

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

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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	-		
<b>Request Details</b>			<b>Source</b>	<b>Type</b>	<b>Status</b>	<b>Action</b>	
Ref ID: 24-00131			Member	Open Enrollment	In-Progress		
Ref ID: 24-00146			Member	Marriage/Domestic Partnership	<a href="#">Requires Approval</a>		

- **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**

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**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 Benefits Summary - Bryan Demo**

Your current benefits are shown below. In some instances, you may have applied for additional benefits that require approval or processing before being effective.



Subscriber

Bryan Demo

Address:	984 Premium Ct Anaheim, CA, 92806	SSN:	XXX-XX-0001
Phone:		Gender:	Male
Email:	thefakeboss@gmail.com	Date of Birth:	01/02/1966
Status:		Date of Hire:	09/01/2024
		Member Termination Date:	
		Group Name:	Demo Co UnitedAg (UnitedAgDemo)

Dependent(s)

Wife Test

Date of Birth:	04/30/2002	Plans Enrolled:	1. N/A
Relationship:	Spouse		

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



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		<a href="#">View</a>
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.

**Manage Members**

View employee or member plans, change coverage, edit information, remove coverage and add dependents.

Fields marked with \* are required.

Company/Group\*

[Add New Member](#)

### 4.2 Employee Demographics

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

Demographic or Contact Information changes should be made in HRIS system.

**Member Details**

**EE Demographics**

<b>Last Name</b>	<b>First Name</b>	<b>Middle Initial</b>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<small>Last Name Required</small>	<small>First Name Required</small>	
<b>Gender</b>	<b>Birth Date</b>	<b>Marital Status</b>
<input type="text" value="Choose..."/>	<input type="text"/>	<input type="text" value="Choose..."/>
<small>Gender Required</small>	<small>Birth date must be before today</small>	
<b>SSN</b>		
<input type="text"/>		
<small>SSN Required</small>		

### EE Demographics

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



**Contact Info**

Address1  Address2  City

Address1 Required

State  Zip  Phone

State Required Zip Required City Required

Email

### EE Contact Info

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

## 4.3 Add Dependents

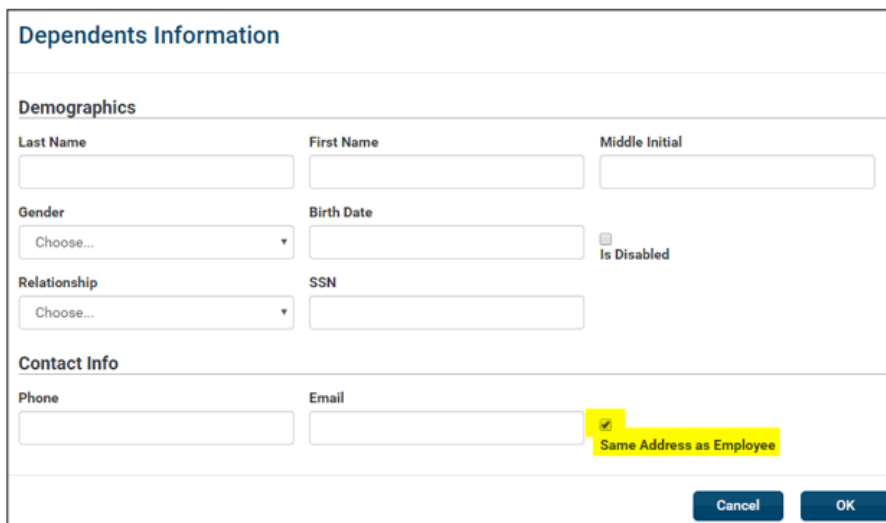
In the **Dependents** section, click the **Add** button to add one or more dependents.



Relationship	First Name	Last Name	DOB	Gender	SSN
<input type="button" value="Add"/>					

Enter Dependent demographics details as shown below.

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



**Dependents Information**

**Demographics**

Last Name  First Name  Middle Initial

Gender  Birth Date   Is Disabled

Relationship  SSN

**Contact Info**

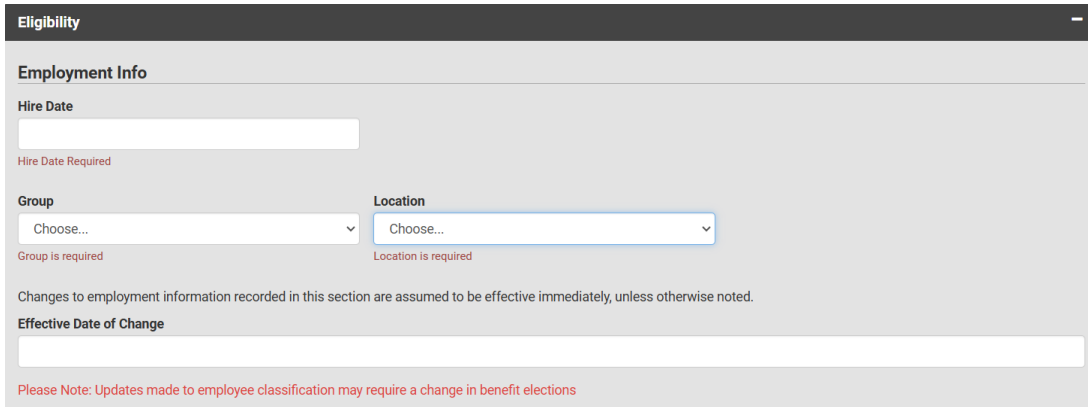
Phone  Email

Same Address as Employee



#### 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 screenshot shows the 'Eligibility' form with the following fields and labels:

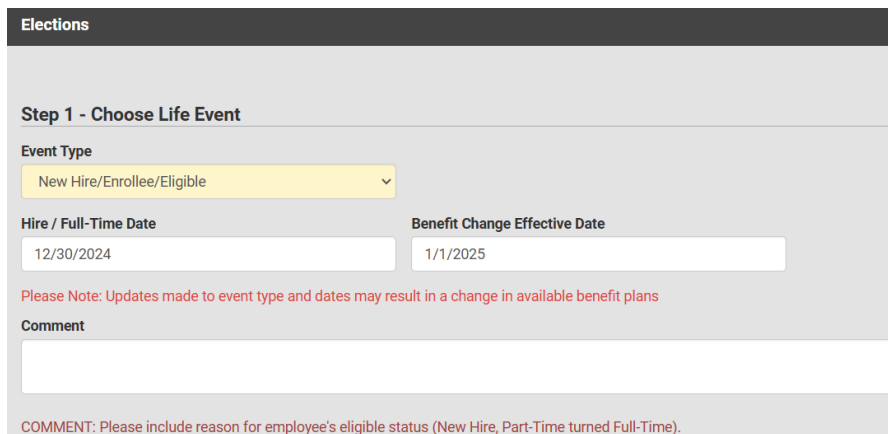
- Employment Info** (Section Header)
- Hire Date** (Text input field)
- Hire Date Required** (Red error message)
- Group** (Dropdown menu with 'Choose...' selected)
- Group is required** (Red error message)
- Location** (Dropdown menu with 'Choose...' selected)
- Location is required** (Red error message)
- Changes to employment information recorded in this section are assumed to be effective immediately, unless otherwise noted.
- Effective Date of Change** (Text input field)
- Please Note: Updates made to employee classification may require a change in benefit elections** (Red note)

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.

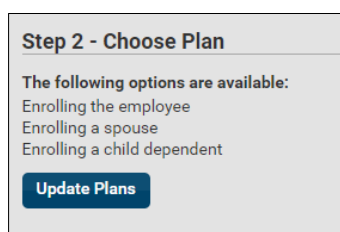
- Step 1 - Choose Life Event** – Select the Event Type (New Hire, Rehire, Marriage etc.), then provide the **Event Date**, which is the date when the actual life event took place. An example is shown below. Comment notes & Disclaimers will display in **Red** depending on the Event Type selected (if displayed,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



The screenshot shows the 'Elections' form with the following fields and labels:

- Elections** (Section Header)
- Step 1 - Choose Life Event** (Section Header)
- Event Type** (Dropdown menu with 'New Hire/Enrollee/Eligible' selected)
- Hire / Full-Time Date** (Text input field with '12/30/2024')
- Benefit Change Effective Date** (Text input field with '1/1/2025')
- Please Note: Updates made to event type and dates may result in a change in available benefit plans** (Red note)
- Comment** (Text input field)
- COMMENT: Please include reason for employee's eligible status (New Hire, Part-Time turned Full-Time).** (Red note)

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



The screenshot shows the 'Step 2 - Choose Plan' form with the following content:

- Step 2 - Choose Plan** (Section Header)
- The following options are available:**
  - Enrolling the employee
  - Enrolling a spouse
  - Enrolling a child dependent
- Update Plans** (Blue button)



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.

**Medical**

Plan Name	Selected Coverage Tier
<input type="checkbox"/> HEALTH SAVINGS PLAN (HSP)	
<input checked="" type="checkbox"/> MISSION CARE PLAN (MCP) <span style="float: right;">Enrolled</span>	Employee + Child
<input type="checkbox"/> WAIVE MEDICAL	

Member	Electing	Action	Relationship	DOB	Effective Date	Term Date	Has Other Coverage?
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Keep Enrolled	EMP		1/1/2017		Unknown
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Keep Enrolled	DEP		6/1/2017		Unknown

**Dental**

Plan Name	Selected Coverage Tier
<input checked="" type="checkbox"/> DENTAL PLAN <span style="float: right;">Enrolled</span>	Employee + Child

Member	Electing	Action	Relationship	DOB	Effective Date	Term Date	Has Other Coverage?
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Keep Enrolled	EMP		1/1/2017		Unknown
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Keep Enrolled	DEP		6/1/2017		Unknown

## 4.6 Summary

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

**Summary**

The above information given to obtain participation in UABT is true and complete to the best of my knowledge and belief. I understand that if any information provided herein proves to be false, UABT reserves the right to deny any claim and revoke all participation in UABT retroactive to the effective date of participation. This statement shall constitute a part of my application for benefits under the Plan Document. I understand that participation in UABT will not become effective unless and until the first payment has been made and UABT approves and accepts this application.

Create Member Letter:

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



## 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.

The screenshot shows the 'Manage Members' interface. At the top, there's a header 'Manage Members' with a sub-header 'View employee or member plans, change coverage, edit information, remove coverage and add dependents.' Below this, a note states 'Fields marked with \* are required.' There is a dropdown menu for 'Company/Group\*' with the text 'Choose a Group...' and an 'Add New Member' button. A 'Member Search' section contains a text input for 'Member Name/ID\*' with the placeholder 'Member Name/ID', a 'Search Members' button, and a link for 'Advanced Search'. To the right, a 'Member Type:' dropdown menu is open, showing options: 'Employee/Member + Dependent', 'Employee/Member' (highlighted), 'Dependent', and 'Employee/Member + Dependent'.

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.

The screenshot shows the 'Enrollment' form for a member. The header is 'Enrollment' with the sub-header 'Manage member, dependent, and benefit enrollment details.' Below this, the 'Group Name' is 'Demo Co IAA' and there is a 'Back' button. A note states 'For saving the enrollment form as draft, only the fields highlighted below are required.' The form is divided into sections. 'Section 1 - Demographics' is expanded, showing 'Member Details' with an 'Edit' button. Under 'EE Demographics', there are fields for 'Last Name' (NEW), 'First Name' (EMPLOYEE), 'Middle Initial', 'Gender' (Female), 'Birth Date' (3/1/1973), 'Marital Status' (Married), and 'SSN' (234112222).

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.

**Section 3 - Elections**

**Enrollment History**

Timeline: 6/1/2016, 6/23/2016, 1/1/2017, 5/1/2017

**Gain of Coverage**

Gain of Coverage Date: 5/1/2017

Product	Plan	Coverage Tier	Effective Date
Medical	Choice Plus HSA	Employee Only	6/1/2017
Dental	Guardian Dental High Option	Employee Only	6/1/2017
Vision	Guardian Vision	Employee Only	6/1/2017
Flex - Dependent Care Acct	FSA Dependent Care	Employee	6/1/2017
Health Savings Acct (HSA)	Choice Plus HSA	Employee Only	6/1/2017
Life Insurance - Company Paid	Company Paid Life + AD&D	Employee	6/1/2017
Life Insurance - Employee Voluntary	Voluntary Life Employee	Employee Only	6/1/2017
Life Insurance - Spouse Voluntary	Voluntary Life Spouse	Employee Only	6/1/2017

**Add Life Event**

- New Hire / Rehire
- Open Enrollment
- Marriage
- Divorce/Separation
- Birth of Child/Adoption
- Termination of Employment
- Loss of Coverage
- Gain of Coverage
- Job Change-Reduced Hours causing term of ben
- Eligible for Medicare (Employee)
- Ineligible Dependent
- Deceased Employee
- Other
- COBRA Enrollment
- Carrier Approved
- Carrier Denied
- Other - Termination of Coverage

**Elections**

**Step 1 - Choose Life Event**

**Event Type**

Marriage/Domestic Partnership

**Marriage/Domestic Partner notarized Date**: 5/26/2016

**Benefit Change Effective Date**: 5/26/2016

Please Note: Updates made to event type and dates may result in a change in available benefit plans

**Comment**

DISCLAIMER: Copies of marriage certificates (licenses) or notarized domestic partner affidavits are needed to establish dependent status. Failure to respond to document requests within 60 days may result in termination of the dependent. COMMENT: Please type 'Supporting Document to be submitted separately' if not available at time of submission.

- 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.

**Medical**

Plan Name	Selected Coverage Tier
<input checked="" type="checkbox"/> Canton Potsdam Medical PPO for SEIU	Enrolled Employee + Spouse

Member	Electing	Action	Relationship	DOB	Effective Date
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Keep Enrolled	EMP		7/1/2014
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Enroll	SPO		6/1/2016

- 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

Member	Electing	Action	Relationship	DOB	Effective Date	Term Date
[Redacted]	<input type="checkbox"/>	Term	EMP	[Redacted]	7/1/2014	5/31/2016
<input checked="" type="checkbox"/> Canton Potsdam Medical for SEBF					Enrolling	Family
Member	Electing	Action	Relationship	DOB	Effective Date	Term Date
[Redacted]	<input checked="" type="checkbox"/>	Enroll	EMP	[Redacted]	6/1/2016	
[Redacted]	<input checked="" type="checkbox"/>	Enroll	SPO	[Redacted]	6/1/2016	

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.

**Step 1 - Choose Life Event**

Event Type  
 Termination of Benefits

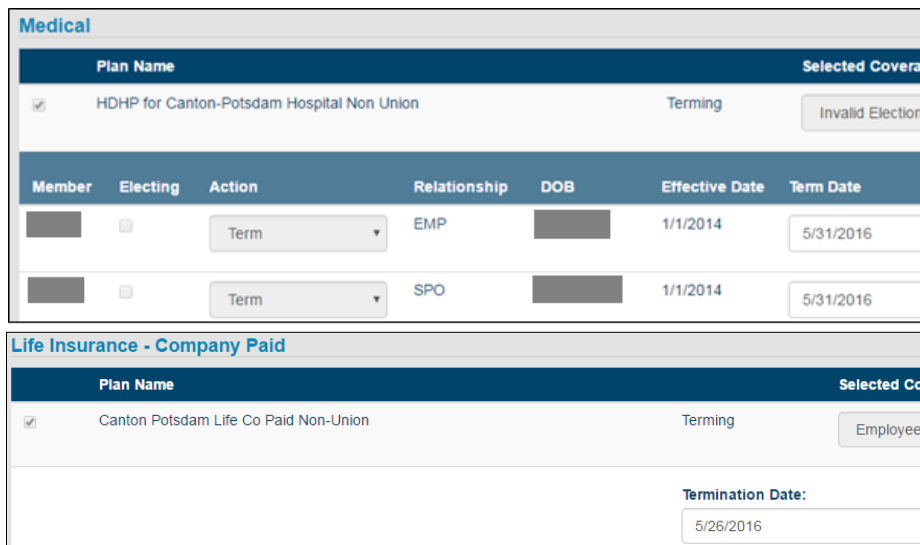
Employment Termination Date: 5/16/2016  
 Benefit Termination Date: 5/31/2016  
(Last Day of Coverage)

Please Note: Updates made to event type and dates may result in a change in available benefit plans

Comment

COMMENT: Please indicate termination reason (Voluntary, Involuntary, Seasonal Layoff, etc.) & last day worked.

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

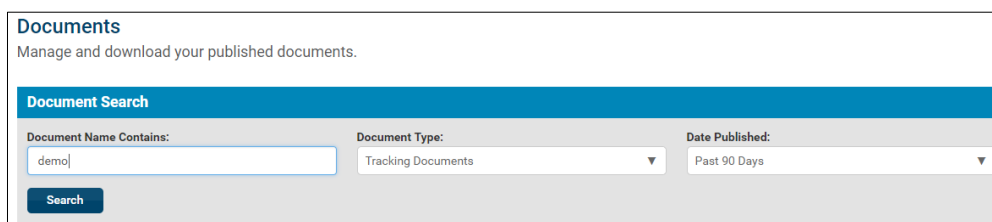
### 7.1 Activities

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
<a href="#">(Benefit) myStrength</a>	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.
<a href="#">(Network) Teladoc</a>	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!
<a href="#">(Benefit) Health &amp; Wellness Clinics</a>	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.)
<a href="#">(Resource) Employer Resource Packet</a>	UnitedAg	A packet of frequently used forms and informational materials to help manage your health benefits.
<a href="#">(Tool) Contribution Payment Portal</a>	UnitedAg	For scheduling online monthly contribution payments (One-time, Recurring and Auto-Pay)

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