EMPLOYER LINK

QUICK START GUIDE

Avera Health Plans
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Sioux Falls, SD 57108

AVHP-1942650

Contents

Getting Started

Employer Link is Avera Health Plans' secure online portal that allows employers to manage employee enrollments and coverage updates quickly and efficiently. The portal also is the conduit for invoicing, premium payments, and employee rosters. You will also be able to assist employees by providing them a print of a temp ID card as PDF, or other benefit information as needed. At each point along the way, look in the upper right for the "Ask A Question" icon, this will permit you to message our team for questions you may have. Click on Submitted CRM to view or sort submitted/received messages.

> Access in Employer Link varies by user role. Some features described in this guide may not be available to you.

Help and contact information.

For help using an activity, click on the webpage.

- **Password Reset:** If you forget your password, contact the Employer Link Site Admin for your group.
- **Unblocking Account:** Please contact your Employer Link Site Admin for your group.
- **Two-Factor Authentication Reset:** Follow the steps in this guide to Reset your authentication method.
- **All other issues**: Call the Help Desk at 605-322-6000 to Report an Issue.

> If you're not sure who your Site Admin is or if they are unavailable, call 605-322-6000.

Browser, system, and connection requirements

You must use one of the following Internet browsers to access Employer Link:

- Google Chrome version 118 or later
- Microsoft Edge version 118 or later
- Mozilla Firefox version 115 or later
- Safari version 17 or later

Employer Link requires a minimum screen resolution of 1024x768 pixels. We recommend that you use a high-speed Internet connection to achieve the best system speed and performance.

How do I log in?

- Initially the client administrator will be provisioned by Avera Health Plans and provided a user name and initial password separately.
- The password will need to be changed
- Enter your single-use passcode that you receive through your two-factor authentication (2FA) method.
- After you enter the passcode, optionally select the **Remember me** checkbox to indicate that you're using a device that's not shared with anyone else. This means you won't be asked for a passcode the next time you sign in from the same device for a while. Note that if you log in through a different device or browser, or your browser's settings are reset, you are still prompted for a passcode.

As the client administrator, you will be responsible for enrolling and assigning user roles under the client account. Terming or dis-enrolling users is also the client administrator's responsibility.

Choose an authentication method

Two-factor authentication (2FA) is a process by which you verify your identity through a single-use passcode before you can access your account. This extra layer of security helps ensure that you're the only person who can log in to your account, even if someone knows your username and password.

When you first log in with your username and password, you're prompted to choose how you'll receive these single-use passcodes.

- Use the link provided by your organization to access Employer Link.
- Enter the user ID and password that you received for Employer Link.
- Choose how you want to receive 2FA passcodes. You can receive the passcodes through a mobile application, a text message, or email.

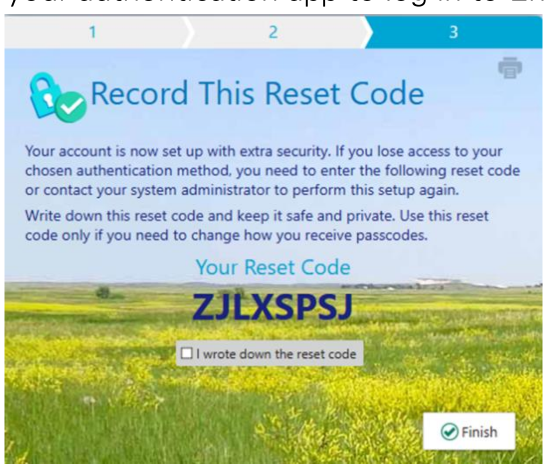
- **Mobile application** requires you to have access to a smartphone with an application like Microsoft Authenticator or Google Authenticator installed. These applications are free on the Apple App Store and the Google Play Store, but standard data rates apply.
- **Email** requires you to access your email at the same time as having the Employer Link website open.

Set up mobile 2FA

- Install an authentication app, such as Microsoft Authenticator or Google Authenticator, on your smartphone if you don't already have one. You can find these apps on the Apple App Store and Google Play Store.
- Open the authentication app and scan the QR code that appears on the EpicCare Link screen after you choose Mobile App as your 2FA authentication method. If you can't scan the code, enter the alphanumeric code that appears below the QR code.
- Click Next.
- Enter the code that appears in the authentication app and click Verify.

> The authentication app shows a code, along with the remaining time that the code is valid. The app frequently generates a new code, so if only a few seconds remain to use the code that's on your screen, wait until a new code appears.

- Write down the reset code that appears on the screen and keep it private. You can use this reset code if you need to change how you receive passcodes. For example, if you get a new smartphone, you can use the reset code to set up your new phone to receive passcodes.
- Click I wrote down the reset code, then click Finish. Going forward, you'll enter the passcodes generated by your authentication app to log in to Employer Link.



Set up email 2FA

- Enter your email address in the indicated field.
- Click ➡ Next.
- Enter the passcode that was emailed to you. Note that it might take a minute or two for the passcode to be sent. If you wait several minutes and still don't receive a passcode, click Re-send Code.
- Click ➡ Verify.
- Write down the reset code that appears on the screen and keep it private. You can use this reset code if you need to change how you receive passcodes. For example, if you get a new email address, you can use the reset code to set up your email to receive passcodes.
- Click I wrote down the reset code, then click Finish. Going forward, you'll enter the passcodes you receive via email to log in to Employer Link.

A new passcode is sent to you each time you log in. Enter this code to complete the login process.

Unlike passcodes, the reset code appears only once after you set up your authentication method. Use this reset code only if you need to change how you receive passcodes.

Reset your authentication method

You can reset your authentication method. For example, you might change the phone number at which you receive passcodes.

- On the login screen, Enter the user ID and password that you received for Employer Link.
- Click **reset additional authentication**.
- Enter the single-use reset code you were given when you originally set up your authentication method.
- Click **Reset**.

If you lost the single use reset code, contact your site administrator.

Navigating in Employer Link

When you log in to Employer Link, several sets of navigation tools appear at the top of the page. Your navigation tools may appear different depending on your login role.

(A) Navigation Tabs: Use these tabs to open different activities in Employer Link. Each tab contains one or more related activities. For example, the Employee tab contains employe-specific activities. When you click a tab, the default activity for that tab opens.

(B) Activity Menu: Use this menu to open the various activities that are contained in the selected navigation tab. For example, the Employee tab activity menu contains Employee Info and Application activities.

- If there are more activities than can fit on the screen, hover over the ellipsis on the far right of the menu to see all the activities contained in the tab.

(C) Action Options: Use these buttons, located on the top right of the screen, to see all your available activities or to log out.

How do I log out?

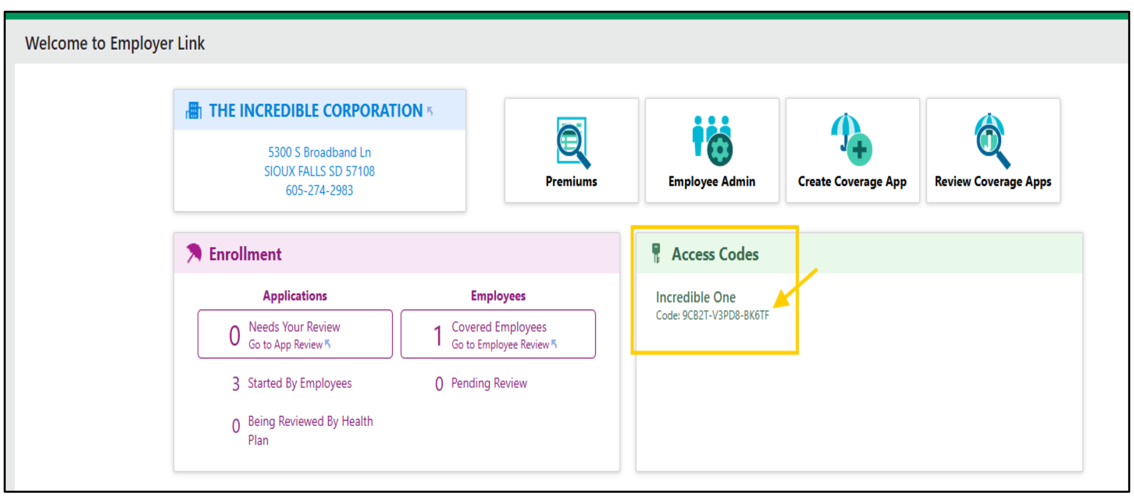
To maintain member confidentiality, you need to log out or secure your screen when you are done working or must leave the computer for any reason. There are two ways to do this:

- Click Log Out **Log Out**. The next time you log in, you are directed to your start page.
- Secure the computer by going to **Menu >Secure**. When you log back in, you return to the same activity that you were using before you secured the screen.

Managing Enrollment

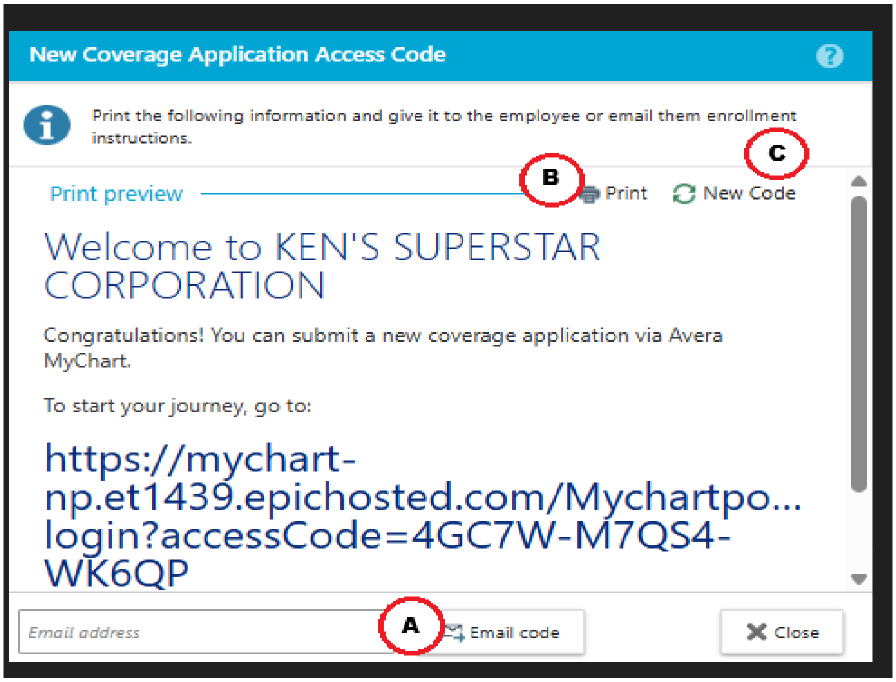
Employers have two convenient options for completing new enrollment online.

- **Employer completes** enrollment on behalf of the employee.
  - The employer accesses the enrollment form directly in Employer Link, enters plan selections and required information, and reviews and submits the enrollment to Avera Health Plans. **Please ensure you complete an address, phone, and email for each enrollment.**



- **Employee completes** their own enrollment.
  - The employer sends the employee a secure access code via email from Employer Link.
  - Upon entry to your login, you will see a pane entitled "Access Codes"
  - Click the code associated to the group the employee will be enrolling in.

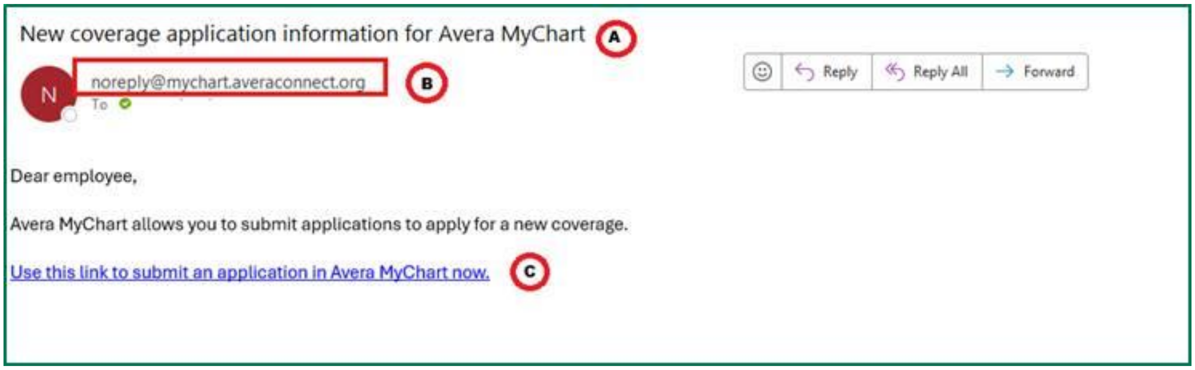
- The employee logs in with the access code, completes their plan selection, and submits the enrollment to the employer.
- The employer verifies the accuracy of the enrollment and submits it to Avera Health Plans. Please ensure the employee completes an address, phone, and email.



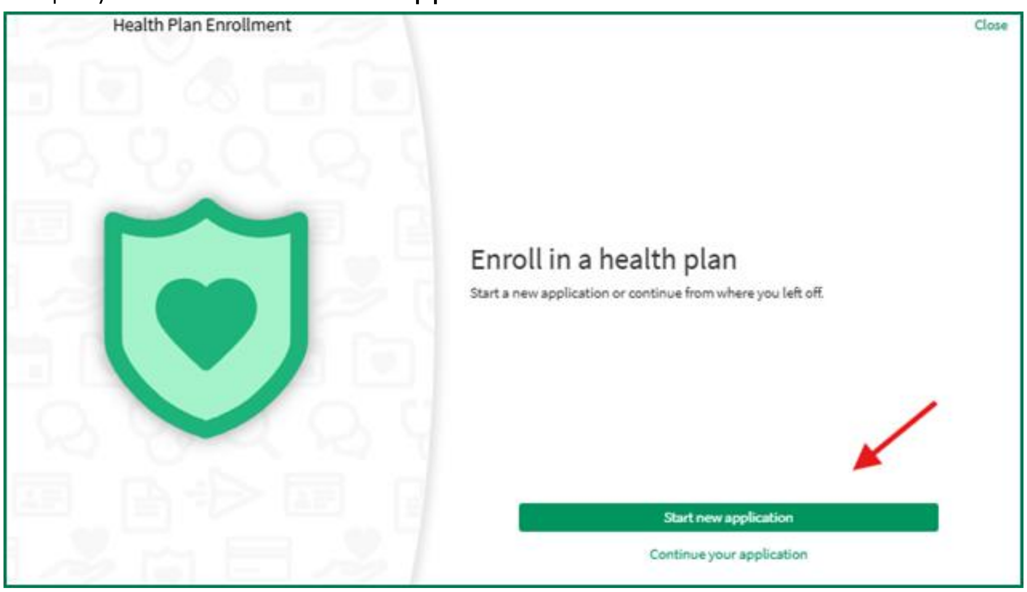
The following are steps the employee will journey through while completing their application online:

The employee will receive an email with a link to complete the enrollment.

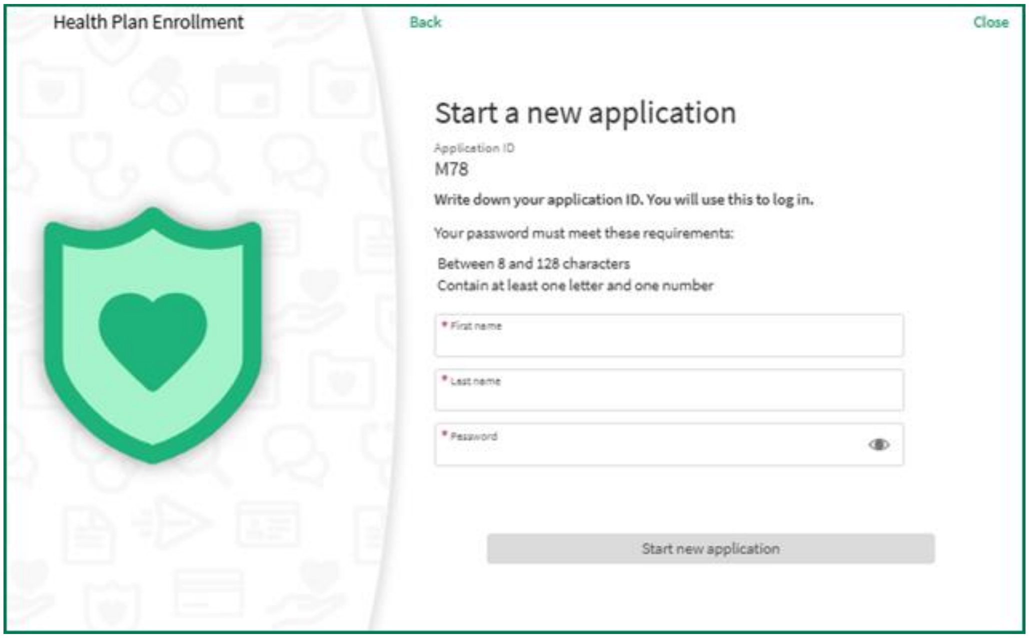
- The subject of the email is **New coverage application for Avera MyChart**. A
- The email will come from noreply@mychart.averaconnect.org. B
- Link to the enrollment form for the employee to complete and submit. C



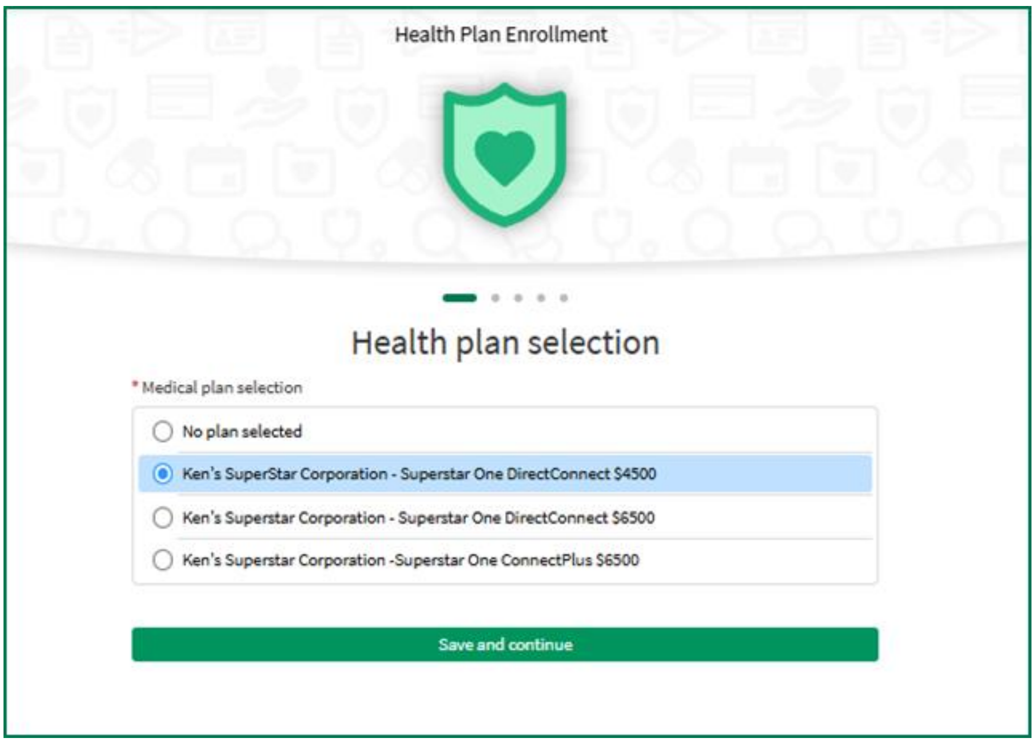
- Employee clicks the link in the email to be taken to the online application.
- Employee clicks **Start New Application.**



- Employee enters their First name, Last name, and creates a Password. Click **Start new application.**

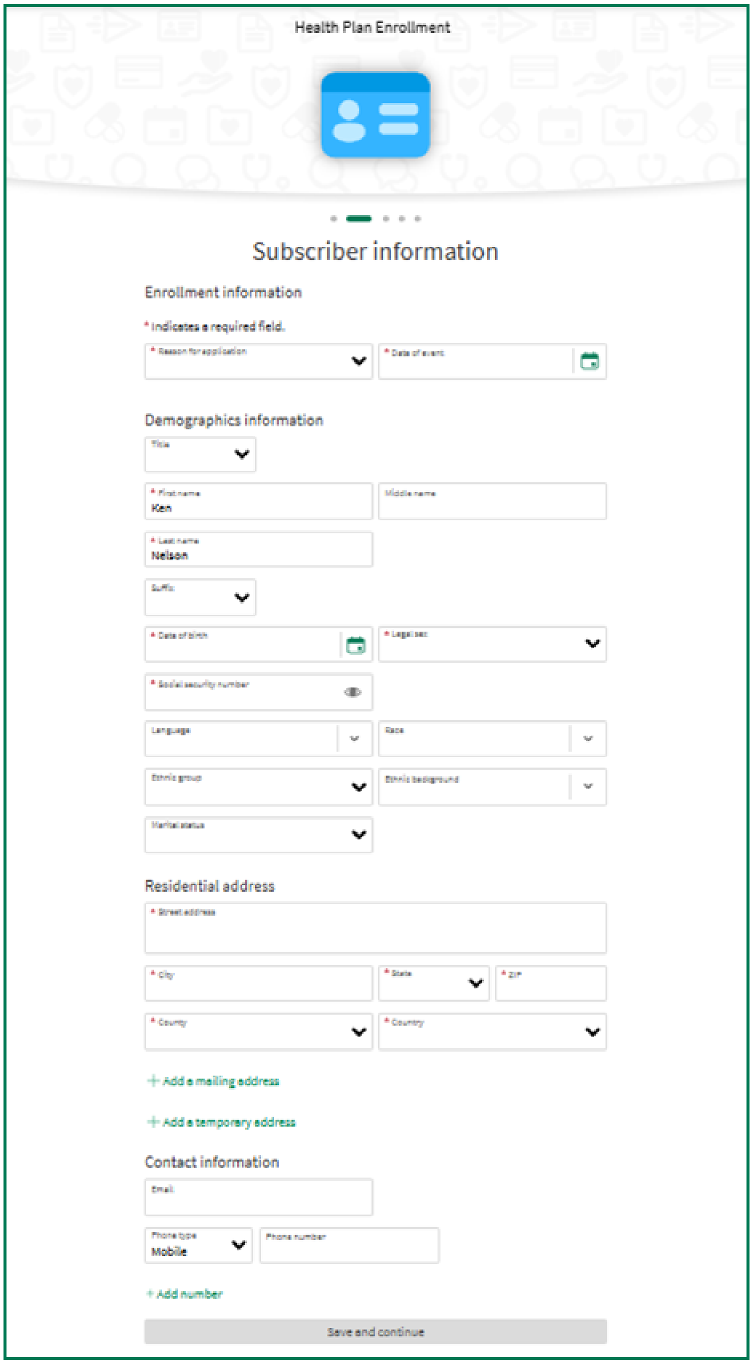


- Employee selects a plan option and the clicks **Save and continue**.

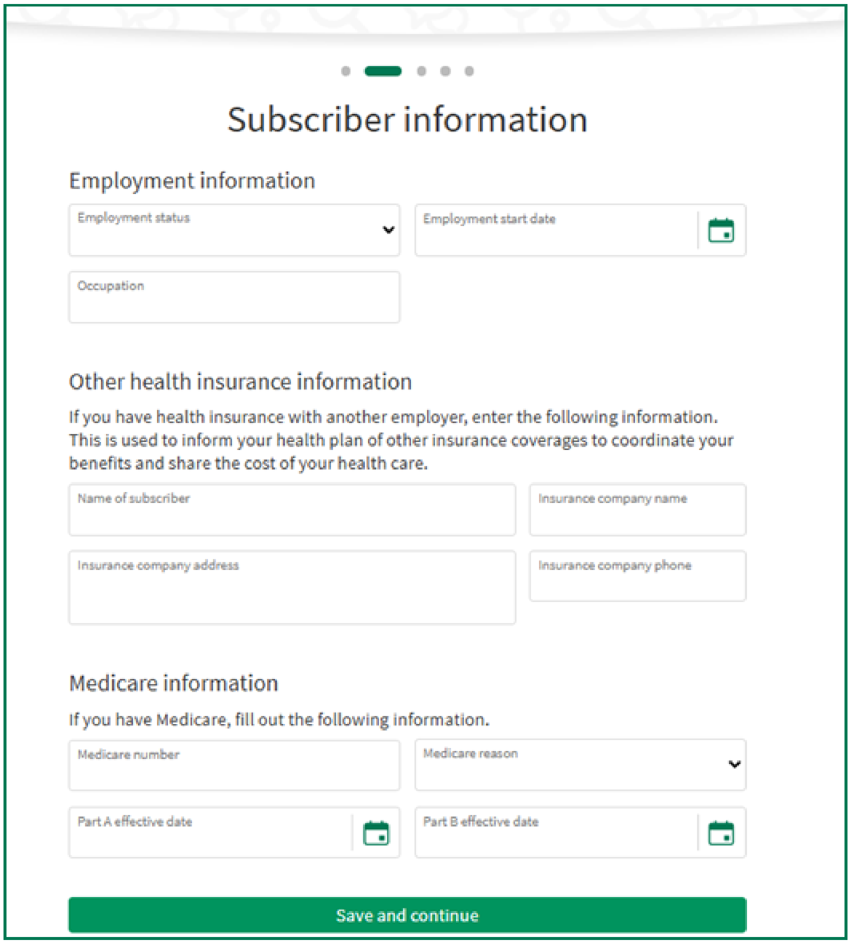


- Employee enters the following information on the first **Subscriber information** screen.
    - Selects an option from the dropdown **Reason for application.**
    - **Date of event**
    - **Date of birth**
    - **Legal sex**
    - **Social Security number**
    - **Residential address information**
    - Mailing address or temporary address if different than residential address (Optional)

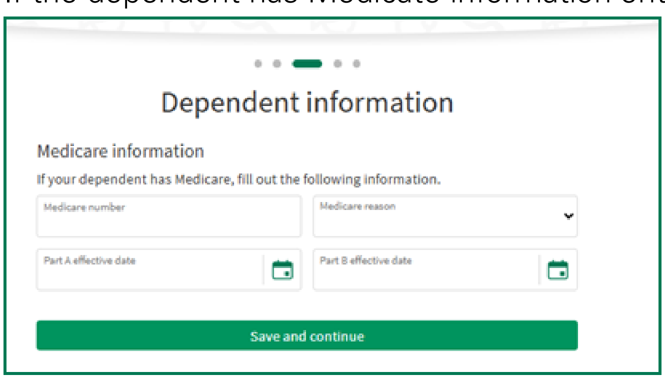
- Email address
- Phone number
- Click **Save and continue**



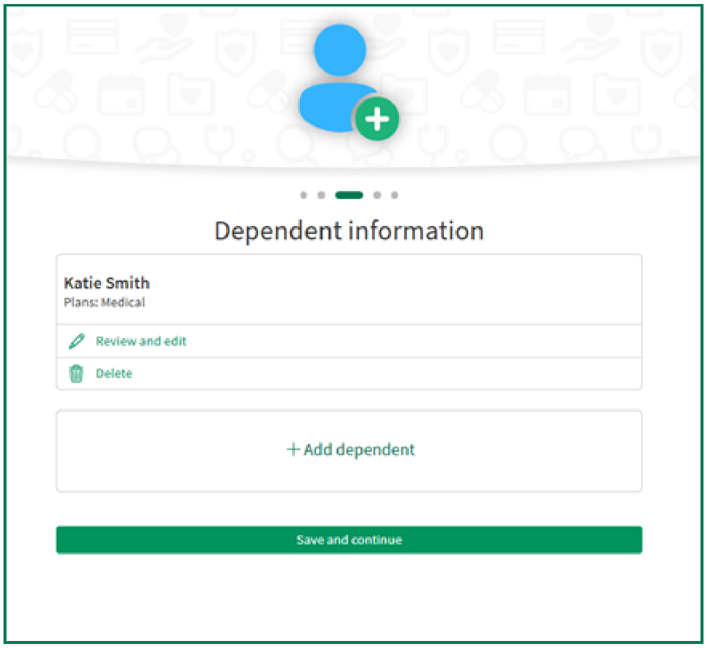
- On the second **Subscriber information** screen update **Employment information** and **Other health insurance information** (if applicable).
- Click **Save and continue**



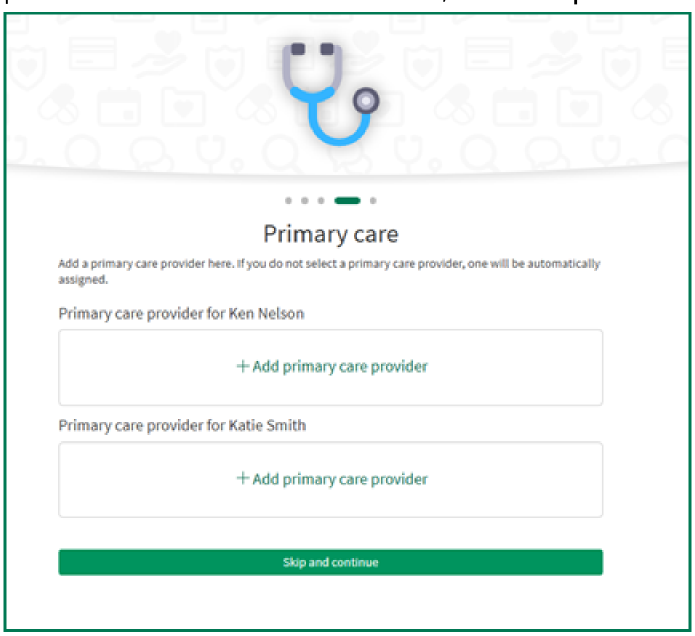
- On **Dependent information** screen, click **Add dependent.** **If there are no dependents to add, click Skip and continue.
    - Complete all required information for the dependent.
    - Click **Save and continue.**
    - If the dependent has Medicate information enter it on this screen.



    - Click **Save and continue.**
    - Click **Add dependent** if you need to add additional dependents and repeat the steps above.
    - If you need to change information for a dependent, click **Review and edit**.



- Click Save and continue.
- Optionally add primary care provider information for employee and dependents. If no provider information is entered, click Skip and continue.



- Review the application and click Submit. To print a copy of the application for your records, click Print before submitting the application.

This ends the employee portion of enrollment. The application will now return to you for review and submission to the health plan.

Employer completes enrollment selections for employee

- Start the Enrollment
  - Click Enrollment in the top menu.
  - Select Create New Coverage Application.
- Select Plans
  - Choose a plan for the employee.
    (If you only offer one plan, this option will not appear.)
  - Click Next.
- Select Qualifying Event
  - Choose the Qualifying Event from the available options.
  - Enter the Event Date (when it occurred).
  - Enter the Effective Date (when coverage should begin).
  - Click Next.
- Add Application Details
  - Fill in the Subscriber Employment Details.
  - Add any Other Insurance the employee may have.
  - Click Next.
- Add Members
  - Enter the employee's name, demographic details, address, and contact information.
    *Note: Phone number and email address are not required fields on the form; **however, they are required by the Enrollment Team to process the request.***
  - To add dependents:
    - Click New Member.
    - Enter their information.
    - Repeat as needed for each dependent.
  - When all members have been added, click Next.
- Add Attachments (Optional)
  - Upload any supporting documents, if applicable.
  - Click Next.
- Review & Submit
  - Review the enrollment form for accuracy.
  - To make changes, click Back.

When ready, click Submit to send the application to Avera Health Plans.

You will receive confirmation box indicating the number of the application submitted.

Review Apps

- Review all app statuses by de-selecting "Show Only My Actionable"
- Click Search
- All apps with Application ID number will appear with the associated status

Viewing Member Information

View a member's benefits and eligibility

- Select **Employee.**
- Choose the employee you want to view and then click **Open Employee**.

> If you have many employees in your roster, you can use **Search** to narrow down your list.

- To see a detailed benefits summary, select **More** in the top right corner of the **Coverages** card. Choose **Benefits Inquiry** from the dropdown.

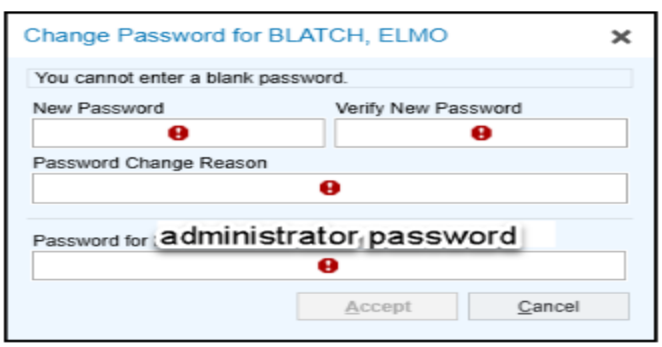
Managing Your Site Users (Site Admin)

Set a user's initial password

- Select **Admin** and click **My Groups.**
- The **Set Initial Password** window appears if there are users who need an initial password set. Click on a user to set their password.
- In the **New Password** and **Verify New Password** fields, enter the new password for the user.
- In the **Password for <your name>** field, enter your (administrator) password.
- Click **Accept**. The next time the user signs in using this password, they will be promoted to select a new password of their choice.

Change a user's password

- Select **Admin** and click **My Groups.**
- Click the key icon in the row for a user to change their password.
- In the **New Password** and **Verify New Password** fields, enter the new password for the user.
- Enter **Password Change Reason**
- In the **Password for <your name>** field, enter your password.



- Click **Accept**. The next time the user signs in using this password, they will be promoted to select a new password of their choice.

Verify users

You might receive a Site Verification message from Avera Health Plans asking you to verify that all users working at your site are current and active. From the message, you can click **Verify Now** and you are brought to the Site Verification activity. From the Site Verification activity, you can verify that all the users and providers working at your site are current, and you can deactivate users as needed to prevent unauthorized access by users whose accounts are outdated.

- In the Active? Column, select No for all the users whose accounts you want to deactivate. You can enter a comment in the **Comments** field that appears.
- Select the **Acknowledgement** check box to acknowledge that you have reviewed the list of users.

Click the **Verify** to verify the list of users and close the screen.

Deactivate a user

- Select **Admin** and click **My Groups.**
- Click the minus icon in the row for a user to deactivate them.
- Enter a comment indicating why you're deactivating the user and click **Deactivate.**

Unblock a user

- Select **Admin** and click **My Groups.**
- A lock icon appears next to any user whose account is blocked. Click **Unblock** to unblock them.

Reset a user's two-factor authentication

You can reset the two-factor authentication settings for a user. For example, if a provider at your clinic gets a new phone but lost their reset code, you can reset the provider's two-factor authentication without having to contact Avera Health Plans to make the change.

- Select **Admin** and click **My Groups.**
- Click the **Two-factor authentication settings** in a row for a user whose settings you want to reset.
- Confirm that you want to reset the user's setting and click **Reset.**

Request a new user for Employer Link

- Select **Admin** and click **Account Requests.**
- Click **Request New Account.**
- Select the appropriate user type for the new user. (Example select Enrollment Coordinator)

Options for Users include:

Choose a type of user to create:

Enrollment Coordinator
Request access for a new Enrollment Coordinator. This role allows the user to create and review coverage applications, update employee demographic information, add dependents or terminate coverage, view and print employee ID cards, download employee rosters, and communicate with Avera Health Plans customer service.

Enrollment Manager - Fully Insured Plans
Request access for a new Enrollment Manager. This role includes all Enrollment Coordinator permissions, plus viewing invoices and billing history and making premium payments.

Account Administrator - Fully Insured Plans
Request access for a new Account Administrator. This role includes all Enrollment Manager permissions, plus responsibilities for managing the site's employer user accounts.

Enrollment Agent Representative
Request access for a new Agent Representative that manages enrollment for your organization. This role allows the user to create and review coverage applications, update employee demographic information, add dependents or terminate coverage, view and print employee ID cards, download employee rosters, and communicate with Avera Health Plans customer service.

Accounting Representative
Request access for a new Accounting Representative that only manages billing and payments. This role allows the user to view/print invoices, manage payments, and communicate with Avera Health Plans customer service. The user will not have access to enrollment functions.

- Confirm the **Employer** name is showing the correct corporation.

> If you are an admin on more than one corporation and the corporation name is incorrect, cancel the request, click on **Context,** and start the request again.

- In the **Division** field, select All Divisions to give the user access to all divisions under the corporation or select an individual division the user should be able to access.

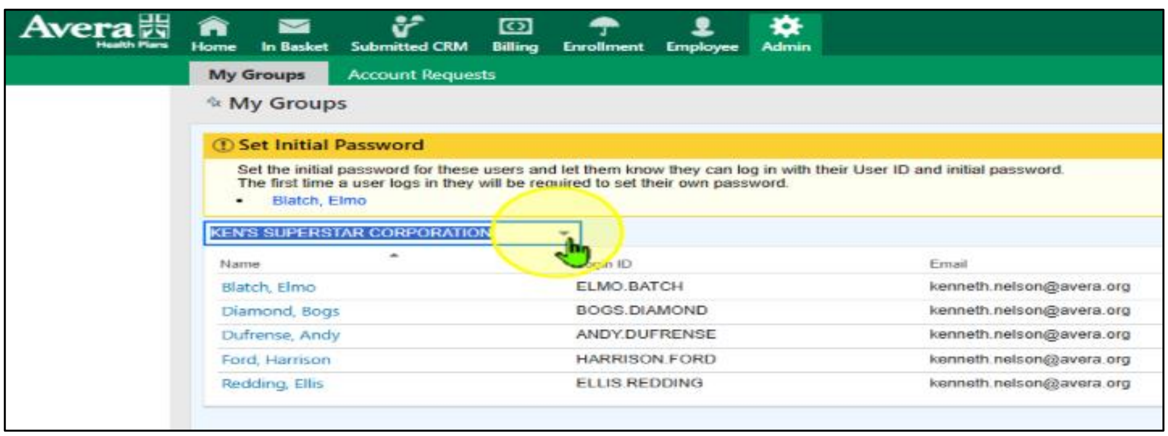
> If you only have one division under your corporation, it will default to the single division record.

> If the new user should be a site administrator, check the box **Make this user a site administrator**.
>
> Note that a site administrator is the person responsible for maintaining a site's records. These responsibilities include verifying that user accounts are current, deactivating the accounts of users who are no longer active at the site, and submitting requests to activate new user accounts.

- Optional: Enter a comment about your request.
- Click ✔**Submit Request.**

New user approval process

- After a new user request is submitted, Avera Health Plans staff will review and process the request. If there are any questions about the request, one of our representatives will contact you.
- We will send the new user an email with their username.
- You, as the Site Administrator, will receive a broadcast message in Employer Link letting you know that a password needs to be created for the user.
- Follow the steps in the message box or see the section in this guide: Set a user's initial password.
- Provide the user with the password you created. They will be required to choose a new password on first login.
- Once your new user is completely approved, they will appear in your group's administrator roster
  - Upon Login Click on "Admin" / "My Groups"
  - Click on each business unit you administer to see the administrators



Invoices and Premium Payments- Overview

- Invoices will be posted monthly on Employer Link; those profiles with access will be able to view and/or pay via Employer Link. Please note that the Accounting Representative Role **only** has access to view and pay invoices; there are no other functions of that role access.
- Notices will be emailed to the address set up in the "Configure Auto Pay" screen.

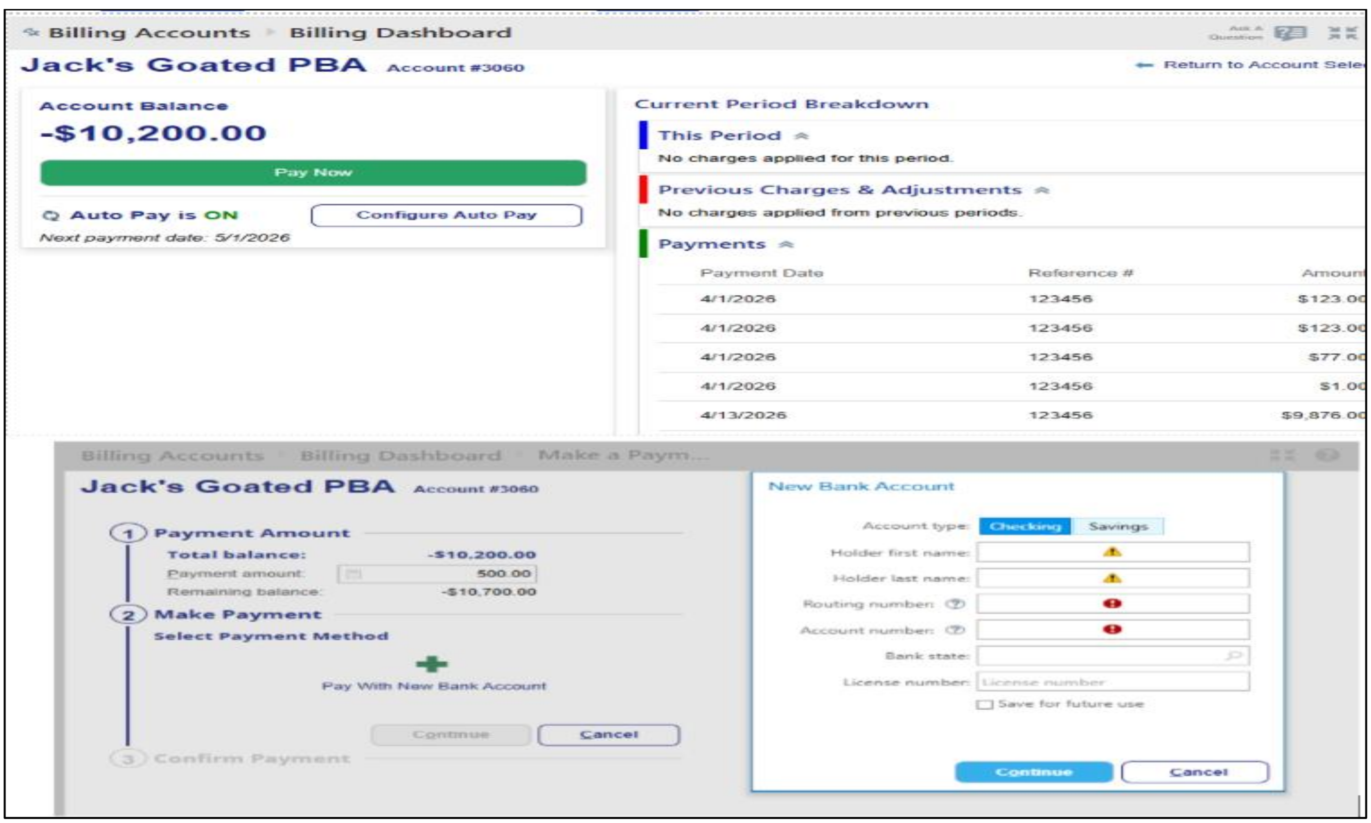
Billing Dashboard

- Overview of current billing period with summary by tiers, subscribers, and members with totals
  - View most recent invoice (pdf)*
  - Download Spreadsheet (this will be password protected, use your login password)*

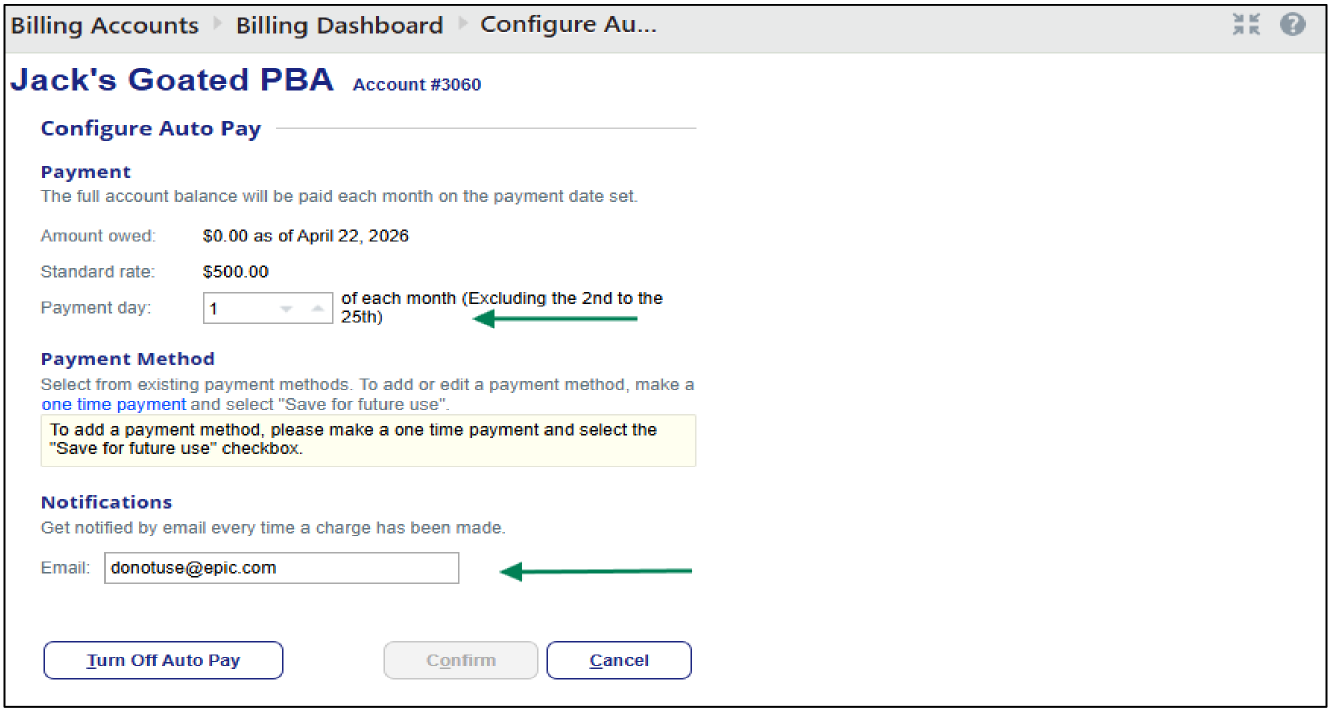
Subscriber ID	**Effective Date**
Subscriber Name	**Rider**
Employer Group	**Type**
Rate Tier	**Retro?**
Members (count of members on plan)	**Total Amount**

*Options are available for historical bills also.

- Account Balance will be shown on left along with "Pay Now" button
- "Configure Auto Pay" button will also be present here.



- Configuring the autopay page allows the entry of the email notification email address



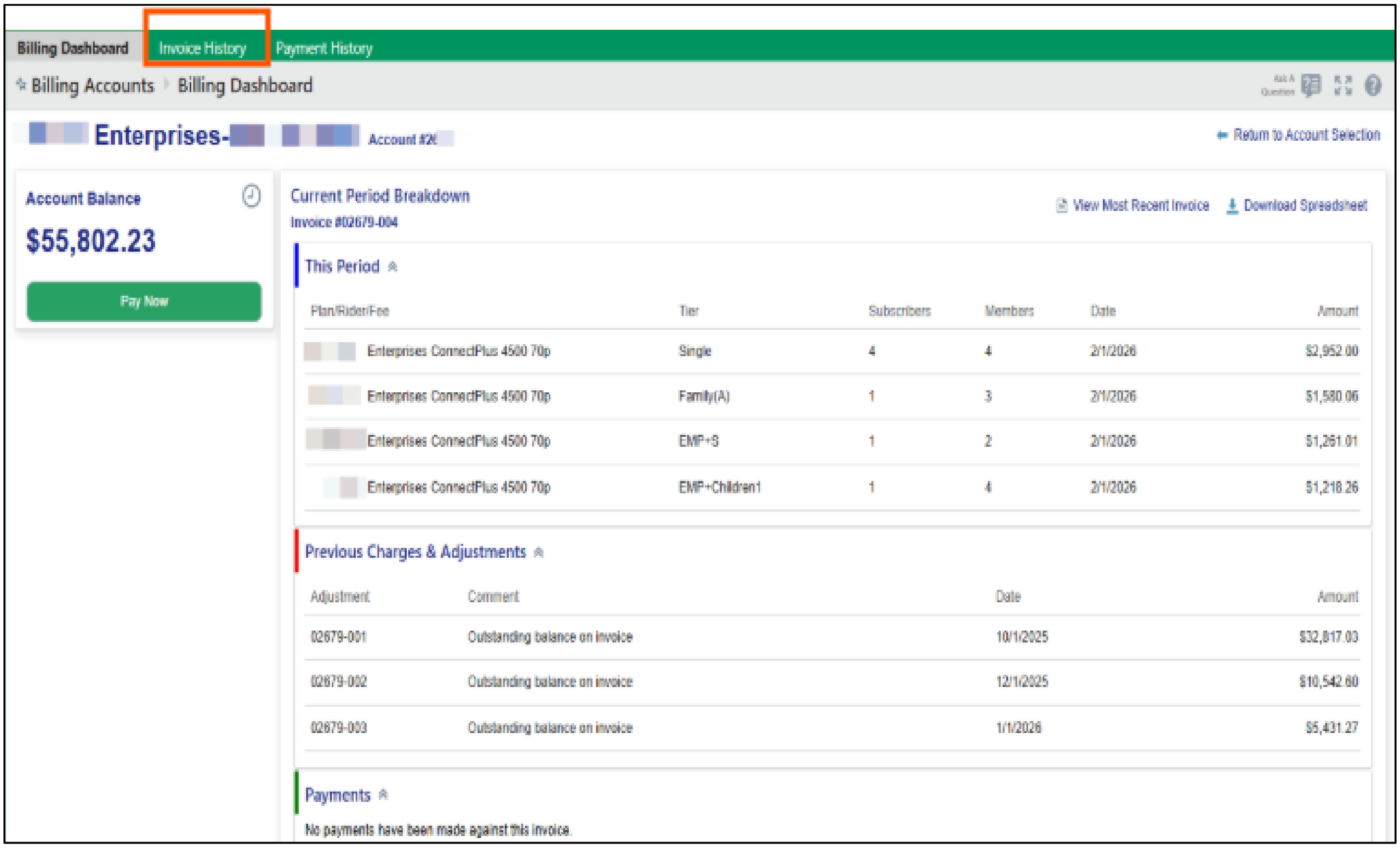
Make a Payment

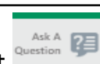
You can make a one-time payment towards your account from this page. When adding a new bank account, save your payment method to make subsequent payments in just a few clicks.

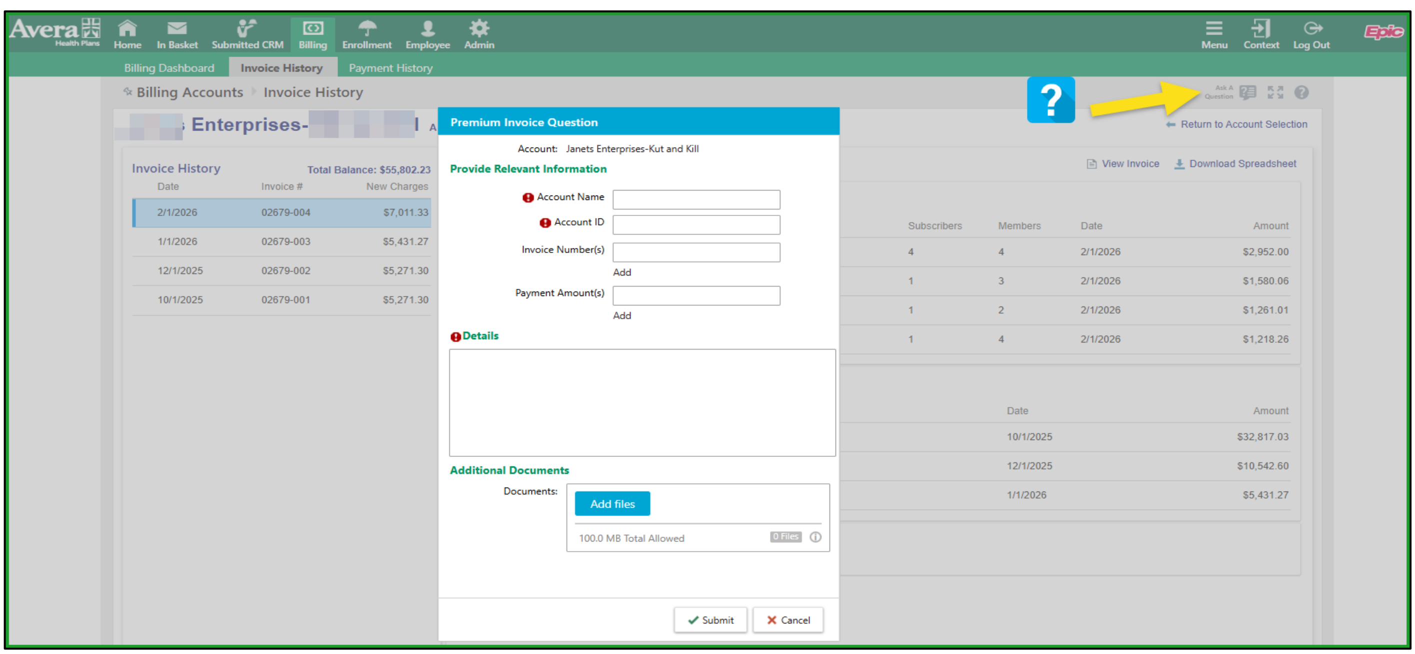
- Enter a payment amount
- Select payment method
- Make Payment to confirm

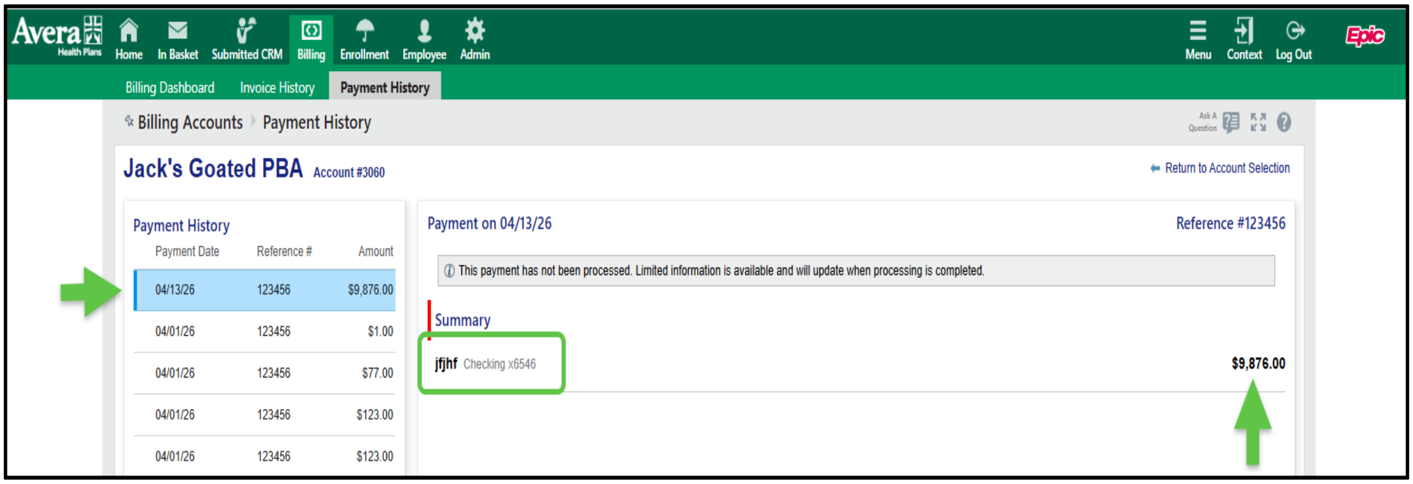
Create New Payment

- Click Pay with New Bank Account
- Enter your account information
- If you want to save the payment method, select the Save for future use box
- Continue to review your payment information and confirm your payment



- Questions can be sent through the portal in the upper left  . Complete the form for secure submission.





- Payment History screen shows payment history along with details of payment tracking number.

Mulitiple Employer Administration

- One login can provide you with access to the all of the employer groups that you administer.
- You can easily switch between these employers with the "Context" Context button in the upper right corner of the screen just to right of the "Menu" button.
- Click on the Corporation you wish to work on and you will be taken to that entity.
- Note: Agents administering more than one group, this is how your screen will appear.

What Happens If I Need Assistance?

- Click the "In Basket" in the upper left corner of the screen, you will see a "New Customer Service Request" drop down box appear.
- Drop down this box select your inquiry and complete the summary.
- Your inquiry will be directed to the appropriate department at Avera Health Plans.
- Review your submissions in "Submitted CRM" to the right of the "In Basket"
- Received replies will be found in your "In Basket"