Benefitfocus Billing & Payments (eBilling)

Client User Guide

BlueCross BlueShield of North Carolina

North Carolina State Health Plan
FOR TEACHERS AND STATE EMPLOYEES
A Division of the Department of State Treasurer

STATE TREASURER OF NORTH CAROLINA
DALE R. FOLWELL, CPA

Benefitfocus for life™

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Disclaimer
This resource includes images containing sample data to better illustrate the functionality of our software within the context of this course. All sample data displayed in the figures throughout this document is simulated, non-personal data.

About This Guide

This guide provides information on how to use Benefitfocus® Billing & Payments (eBilling). Billing & Payments (eBilling) is an electronic invoice presentment and payment solution, securely hosted for you to efficiently manage and pay your invoices online.

The chapters in this guide correspond to each of the tabs that appear in the main navigation bar on the left of each page of the Billing & Payments (eBilling) application. See Working with the Billing & Payments (eBilling) Home Page for additional information.

Some features in this document may not be available to you, based on software settings established for your company and/or security-driven features within the application. Please contact your account representative if you have questions about your access.

This document may include the following icons to highlight additional information, warnings and suggestions:

The *document* icon references external documentation that is useful to further understand the information being presented.

The *note* icon provides additional or important information about special conditions, suggestions or actions that should be taken.

The *risk* icon is a warning, often cautioning against taking certain actions.

The *tip* icon provides additional, more efficient instructions when completing a task.

Chapter 1 Billing & Payments (eBilling) Basics

This chapter provides information on the basics of working with the Benefitfocus Billing & Payments (eBilling) application and includes information on logging into the application, working with the Billing & Payments (eBilling) user interface and managing your account information.

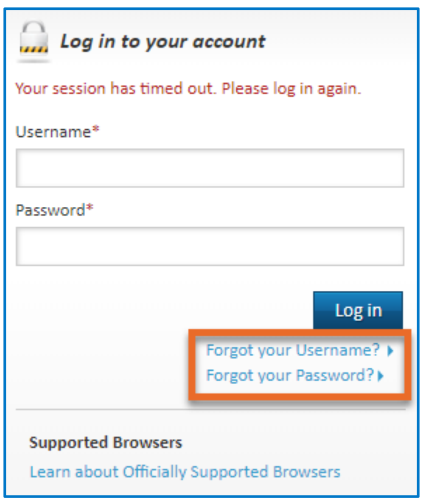
Getting Started with Billing & Payments (eBilling)

Depending on your configuration, you may either access eBilling via Single Sign On (SSO) from your existing Benefitfocus® eBenefitsNow or Communication Portal or you may login to the Billing & Payments (eBilling) application directly. Refer to the instructions provided below that are most appropriate to your situation.

Logging in Directly to Billing & Payments (eBilling)

Prior to accessing Billing & Payments (eBilling), you should be provided with a web address, username and initial password by your Benefitfocus Account Manager.

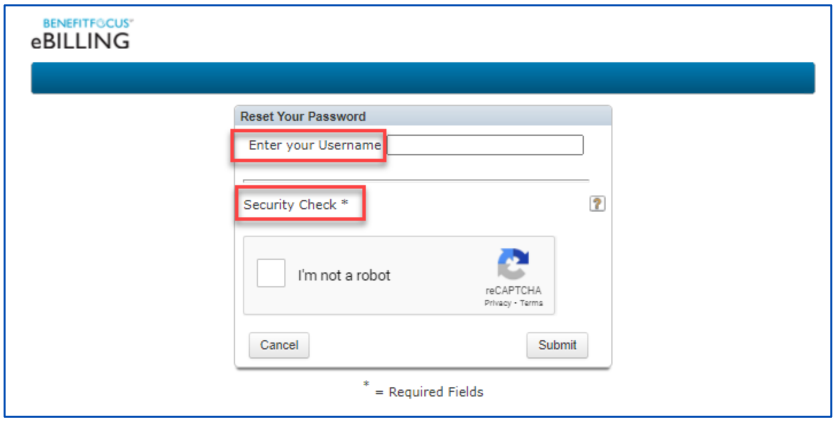
If you have the web address for the Billing & Payments (eBilling) site, but have forgotten your *Username* or *Password*, you may be able to use the links provided on the login page to retrieve your username or reset your password.



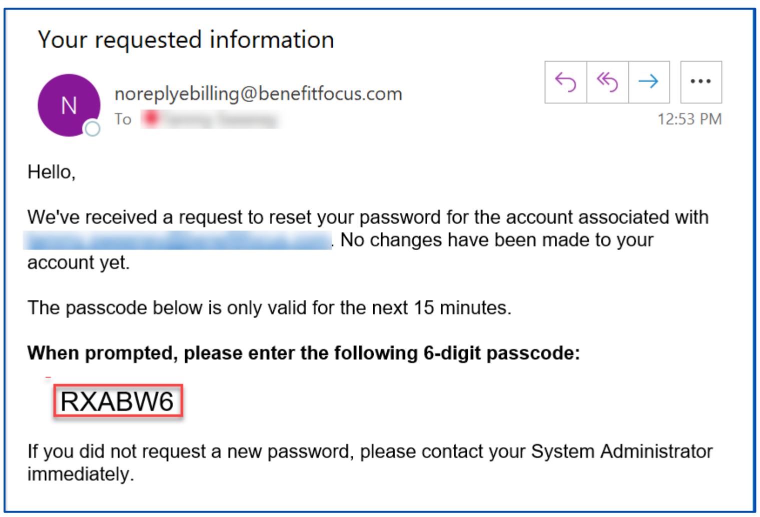
You will need to have an email address on file for verification purposes to use the retrieval/reset feature.

If you have forgotten your username, you will be asked to provide the first name, last name and email address associated with the Billing & Payments (eBilling) account to help identify your account and then you will be required to answer a secret question to verify your identity.

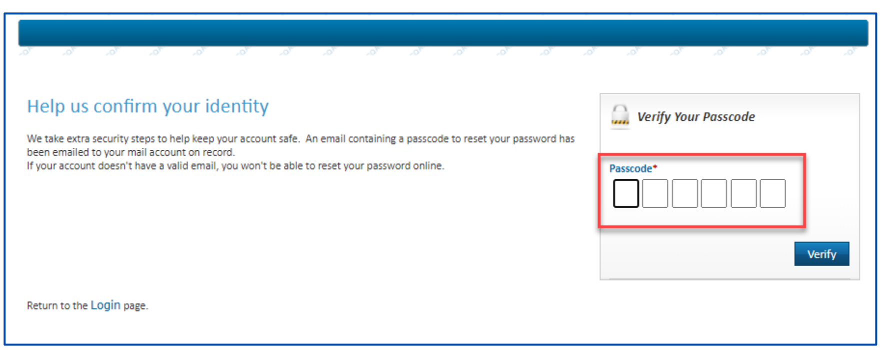
If you have forgotten your password, you will be asked to provide your username and pass the Security Check to identify your account.



A 6-digit validation code to reset your password will then be sent to the email address associated with your Billing & Payments (eBilling) account. Note, the link is only valid for 15 minutes after sending.



You will be asked to enter the 6-digit validation code in the Billing & Payments (eBilling) screen to verify your identity before you may reset your password.



Complete the following steps to log into Billing & Payments (eBilling).

1. Navigate to the Billing & Payments (eBilling) login page by entering the provided web address into your web browser address field: https://bcbsnc-shp.secureebilling.com/

   If you have not received, or if you have forgotten, the web address for the login page, please reach out to your Benefitfocus Account Manager.

2. Enter your *Username* and *Password* in the fields provided.

3. Click *Log In*.

If this is your first time logging in, you may be prompted to update your initial password and to enter secret questions and answers. See *Updating Your Account - Email, Password and Secret Questions* for password requirements. Your secret questions and answers may be used to verify your account in the case of a forgotten username or password.

Logging into Billing & Payments (eBilling) from eBenefitsNow

If you are a Benefitfocus eBenefitsNow client, you may be able to access Billing & Payments (eBilling) from your existing eBenefitsNow application.

The option to SSO between Benefitfocus applications must be enabled for your organization by a Benefitfocus Administrator and your user account must be granted permissions to SSO to Billing & Payments (eBilling) to use this option.

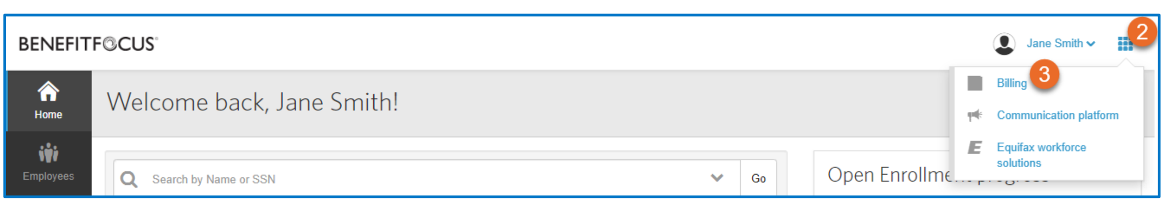
Complete the following steps to access Billing & Payments (eBilling) from the eBenefitsNow Benefits Administrator role.

1. Log into eBenefitsNow.

   Prior to accessing eBenefitsNow, you should have been provided with a web address, username and initial password by your Benefitfocus Account Manager. If these were not provided to you or you have forgotten the web address of your login page, please reach out to your Benefitfocus Account Manager.

2. Click the application launcher in the upper right hand corner the Benefits Administrator role.

3. Select *Billing* from the drop-down menu that displays.



You will be logged into your Billing & Payments (eBilling) application via SSO.

Updating Your Account - Email, Password and Secret Questions

Your account settings may include your email address, your account password and security questions.

If you SSO into Billing & Payments (eBilling), your login information may be maintained in a separate system and you will not have access to the *My Account* link.

The email address on file will be used for any notifications sent from the Billing & Payments (eBilling) application and may be used for username recovery or password reset.

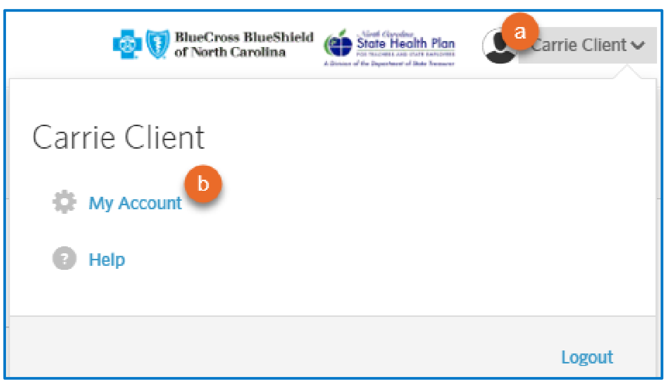
Your password is used to access the Billing & Payments (eBilling) application and therefore must be considered personal and confidential. When creating or updating your password, your password must meet the following criteria:

- 8 – 15 characters in length (special characters are permitted, but not required)
- At least one uppercase letter
- At least one lowercase letter
- At least one number
- No spaces
- No more than 2 of the same characters in a row
- Cannot contain your email or username
- Cannot be the same as your previous password

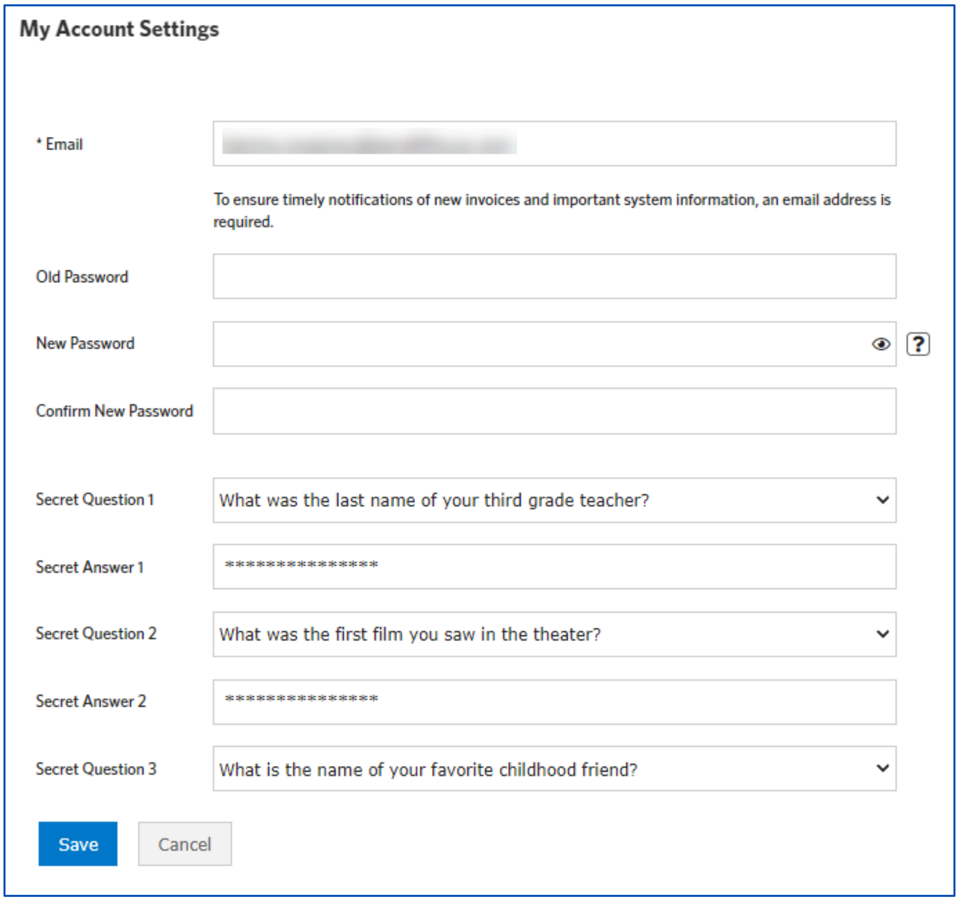
Security questions may be used for account validation in the future, if you lose your username or password.

Complete the following steps to update your account settings.

1. Click the user profile menu in the upper right corner, and then click the *My Account* link.



The *My Account Settings* page displays.



My Account Settings

* Email

To ensure timely notifications of new invoices and important system information, an email address is required.

Old Password

New Password

Confirm New Password

Secret Question 1 — What was the last name of your third grade teacher?

Secret Answer 1 — ***************

Secret Question 2 — What was the first film you saw in the theater?

Secret Answer 2 — ***************

Secret Question 3 — What is the name of your favorite childhood friend?

Save Cancel

2. Enter or update your preferred email address.

   Be sure to enter a valid email address. Notifications, such as when new invoices are ready for review, will be sent to the email address entered on this page.

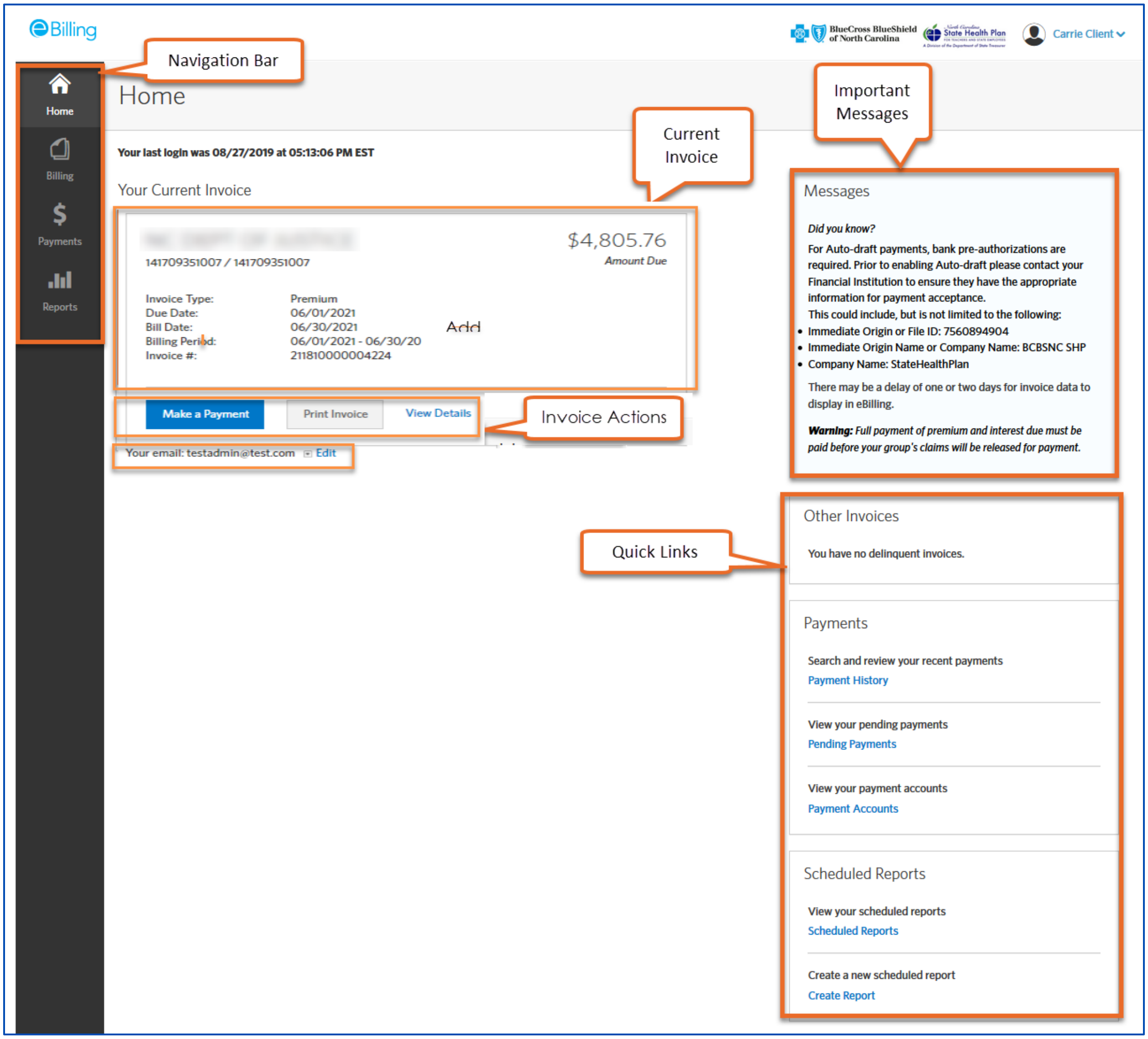
3. Update your password, if desired, by entering your current password in the *Old Password* field and then entering your new password in the *New Password* and *Confirm New Password* fields.

   Click the help icon next to the *New Password* field to view password requirements.

4. Enter or update security questions as desired. Each secret question must be unique.

5. Click *Save*.

Working with the Billing & Payments (eBilling) Home Page

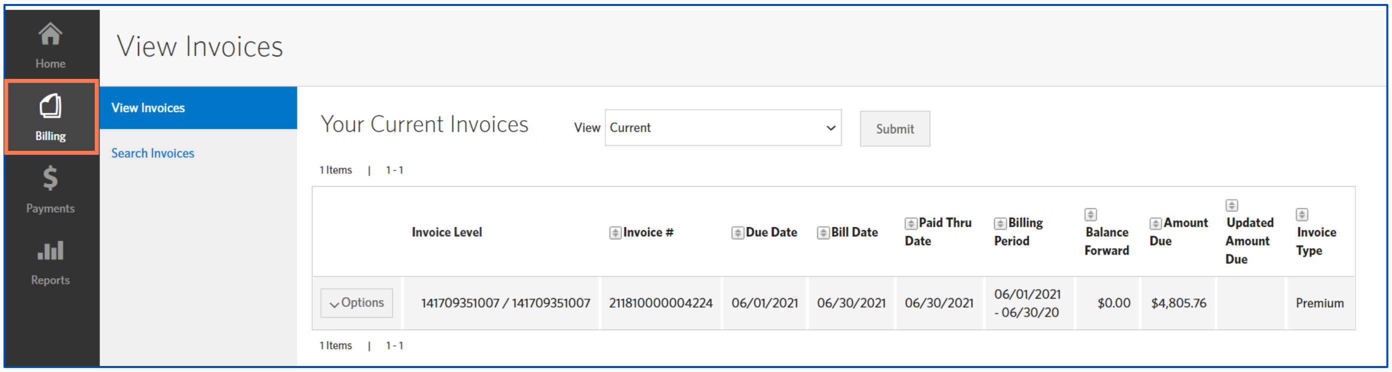


On the home page, you can access a number of the major features of the Billing & Payments (eBilling) application, including:

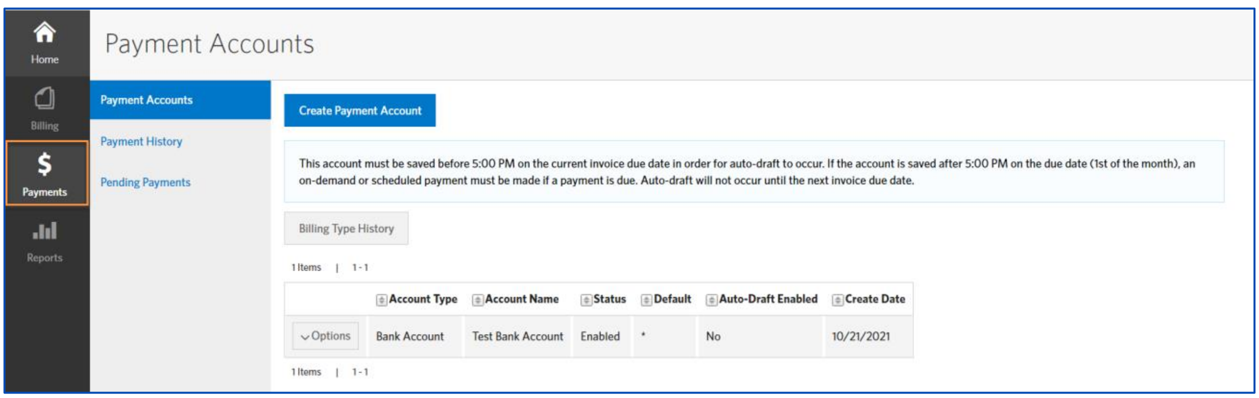
- View your current invoices and invoice details
- Make a payment
- Print your current invoice
- Viewing invoice details
- Edit Email Address link

Using the navigation bar, available from all pages within the application, you can quickly navigate to any tab to access the functions you need.

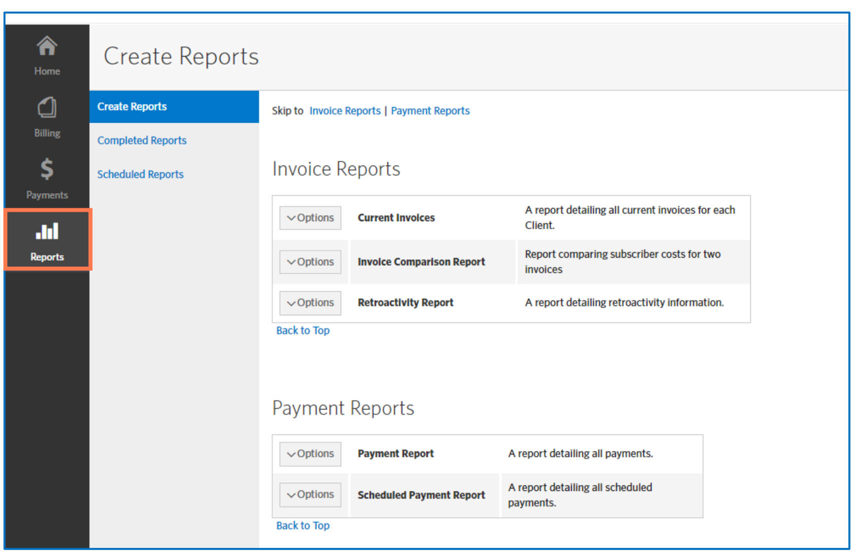
- *Billing* tab: Search for and view invoices with additional options to drill down into the invoice details, print the invoice or make a payment



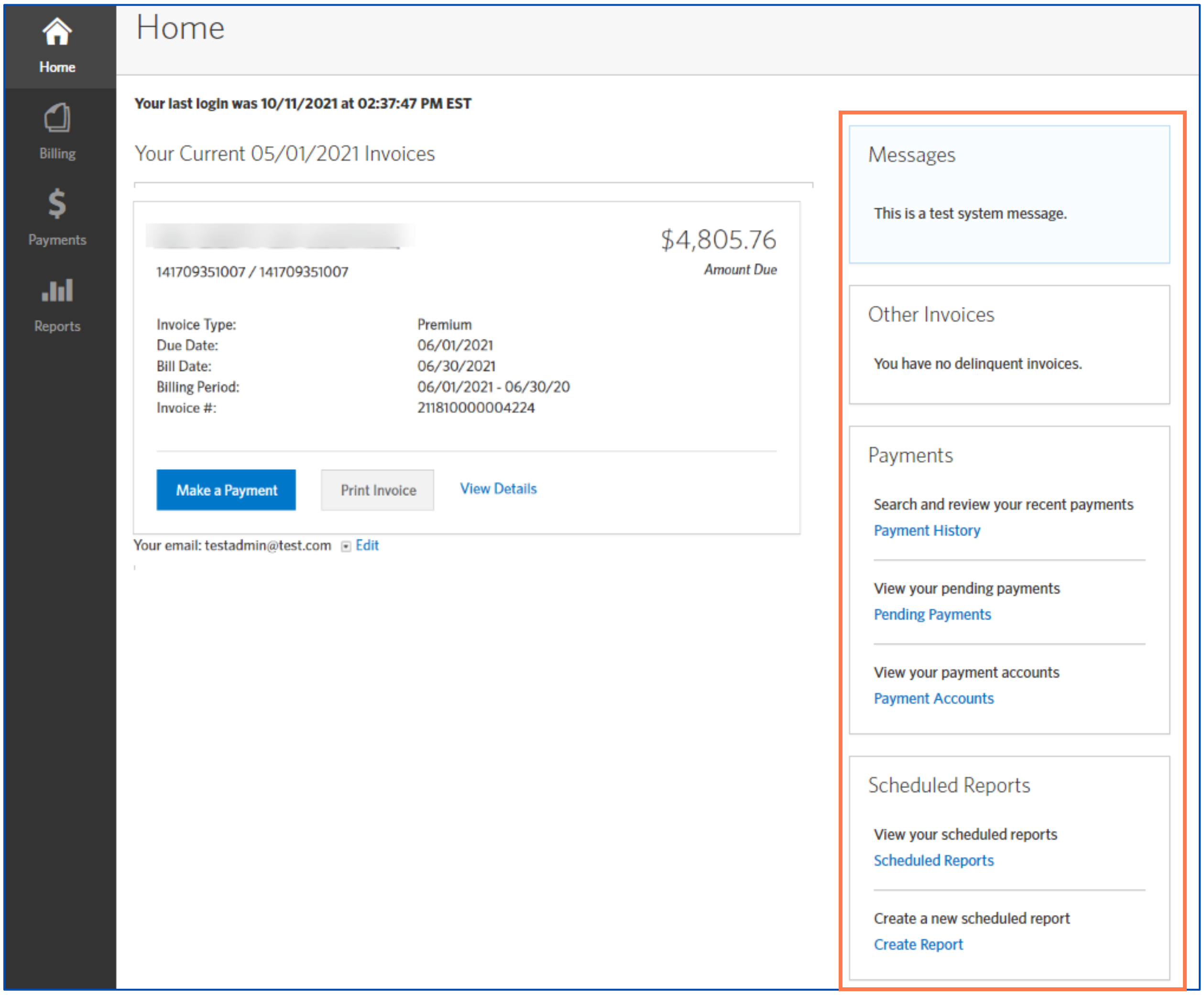
- *Payments* tab: Manage payment accounts and view payment history or pending payments



- *Reports* tab: Create, schedule and view reports

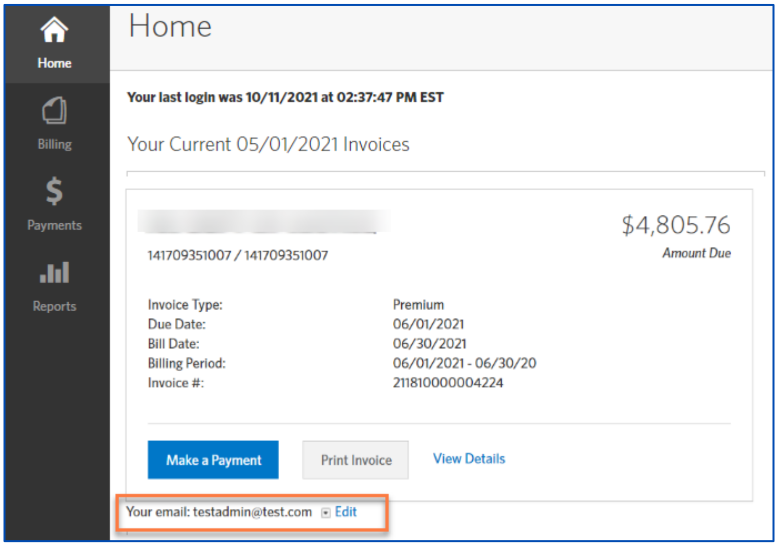


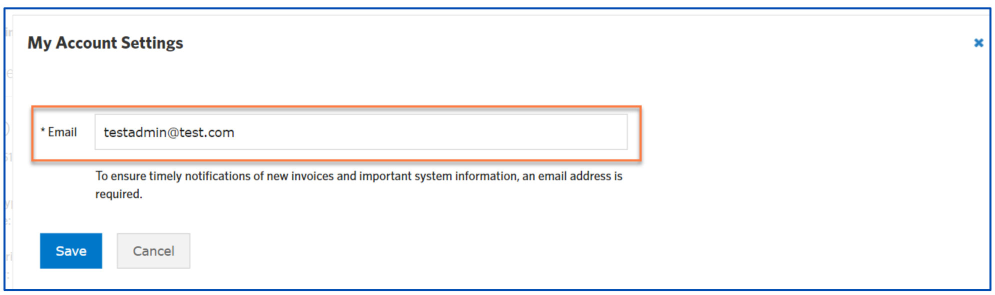
The home page also includes additional sections for quick access to messages, delinquent invoices, payment history and account information and reports.



- The *Messages* area displays important information and instructions. This may include system messages alerting you to any planned application downtime for maintenance or messages from your carrier.
- The *Payments* area provides quick access to payment history, pending payments and payment account information.
- The *Scheduled Reports* area provides quick access to the *Scheduled Reports* page and to creating new reports.

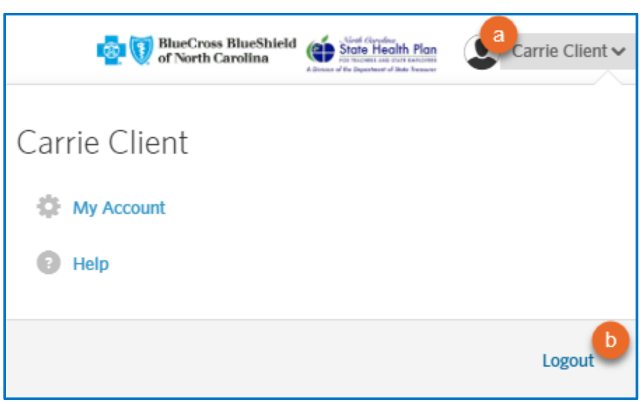
- The Edit Email Address link provides quick access to update the user's email address





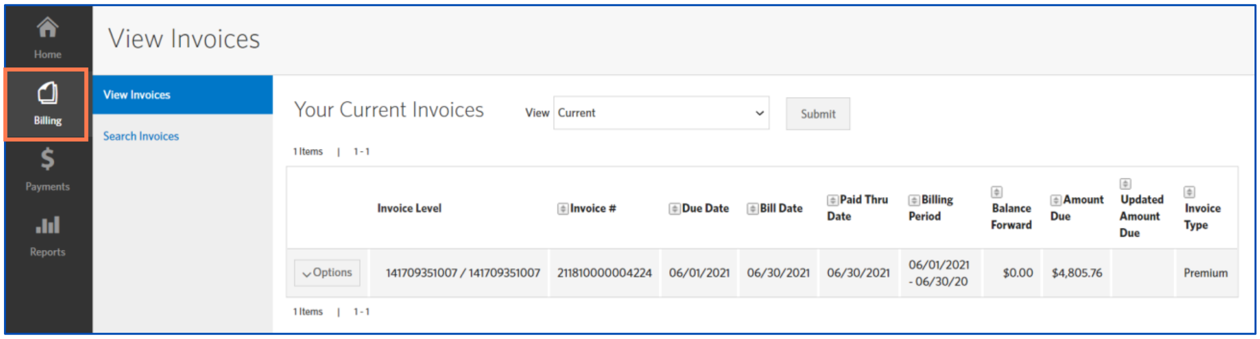
Logging out of Billing & Payments (eBilling)

To log out of Billing & Payments (eBilling), click the user profile menu in the upper right corner, then click the *Logout* link.



Chapter 2 Billing

By default, your most recent invoices are displayed on the Home page. You can view additional invoices and invoice information on the *Billing* tab, which also enables you to search for invoices.



Viewing Invoices

The View Invoices page provides you with at-a-glance visibility into your invoices. This page provides a list of invoices meeting the entered search and filtering criteria along with high-level information such as

- **Invoice Level**: Unique numbers identifying your account with the carrier
- **Invoice #**: Unique number identifying the invoice
- **Due Date**: The date payment is due for the invoice
- **Bill Date**: The date the invoice was issued
- **Paid Thru Date**: Date through which coverage has been paid
- **Billing Period**: The coverage period for premiums billed on the invoice
- **Balance Forward**: Any unpaid outstanding balance or credit from a previously billed invoice
- **Amount Due**: Total amount due for the current billing period
- **Updated Amount Due**: If the invoice has been updated due to an adjustment or correction after original bill was issued
- **Invoice Type**: Indicates if the invoice is for premiums due or if the invoice is for any interest accrued due to late payment

By default, this page displays all *Current* invoices, but you may search for invoices by an invoice status and/or an invoice level (if applicable). The list can be sorted by any of the included details.

You may perform a more advanced search using the options provided on the *Search Invoices* tab. See *Searching for Invoices* for more details.

The list below provides a brief description of each invoice status:

- *Current*: All invoices from the current coverage period that do not have a payment applied to them
- *Prior*: All invoices from a previous coverage period and do not have a payment applied to them
- *Paid*: All invoices that have payments applied to them

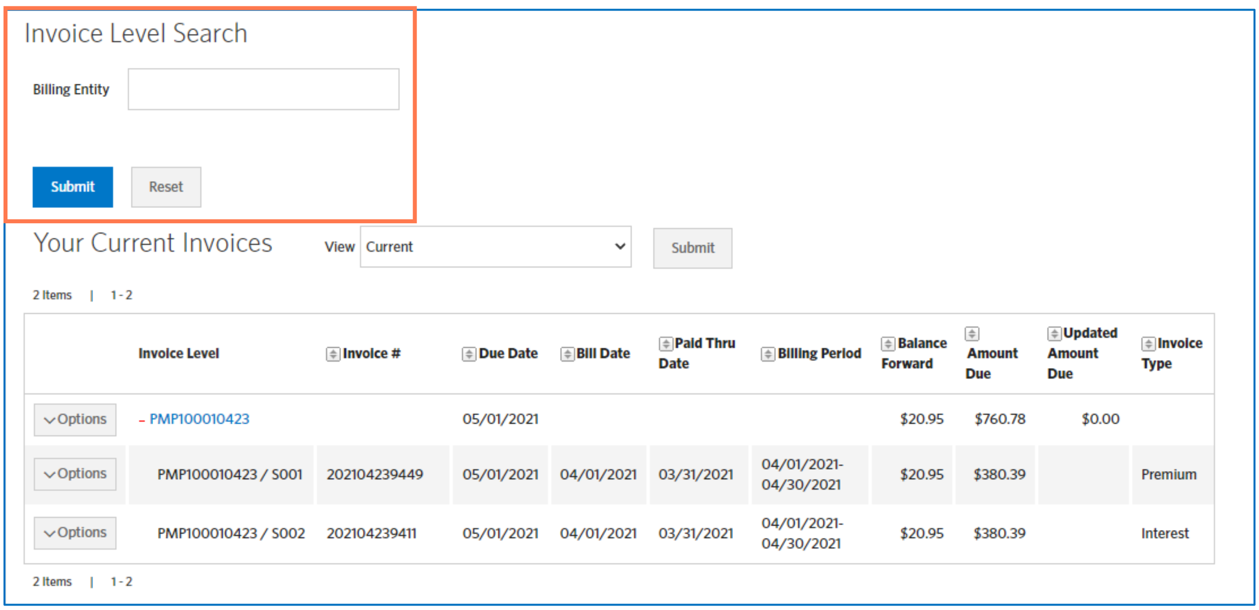
Searching by Invoice Level

Invoice level may be used by groups who receive separate invoices for different groupings of members, such as per location or line of business. If a group is using invoice levels, an *Invoice Level Search* option will display at the top of the View Invoices page.

Complete the following steps to view invoices for a specific invoice level or invoice group.

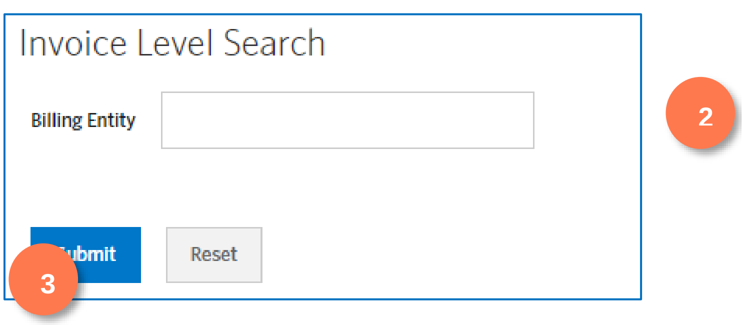
1. Click the *Billing* tab on the navigation bar. The *View Invoices* page displays. The default display is all *Current* invoices, but you may select another status from the drop-down menu and click *Submit* to view.

The Invoice Level Search is located at the top of the page.

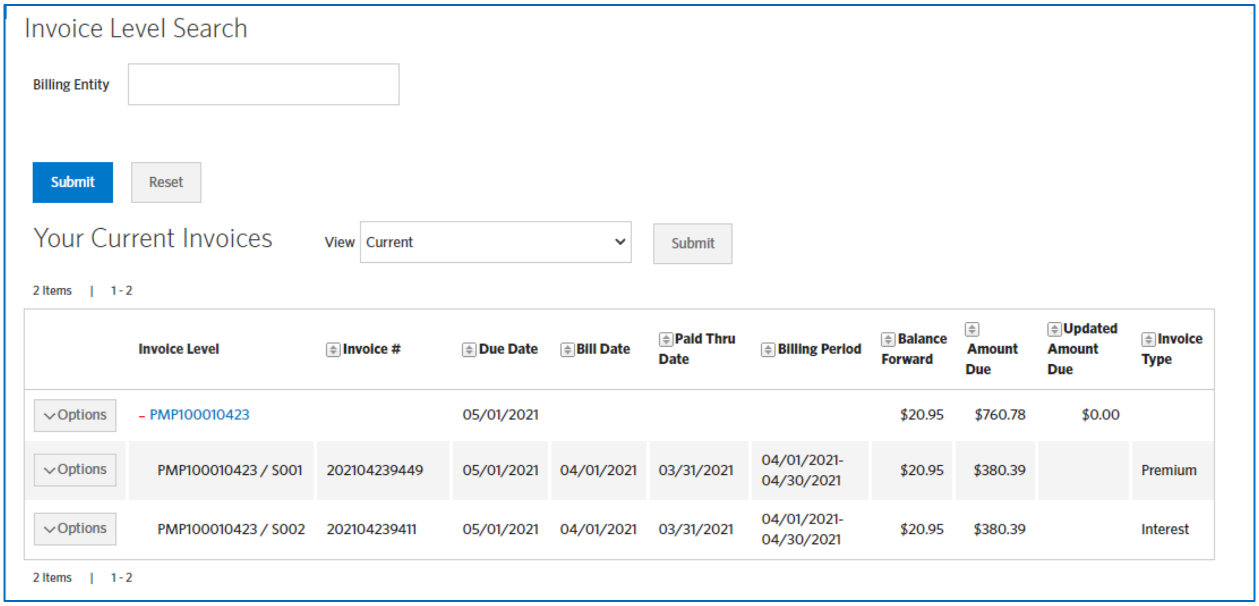


2. Enter the invoice level identifier in the *Invoice Level Search* field, shown here as *Billing Entity (e.g. 141707421007)*.

3. Click *Submit*.

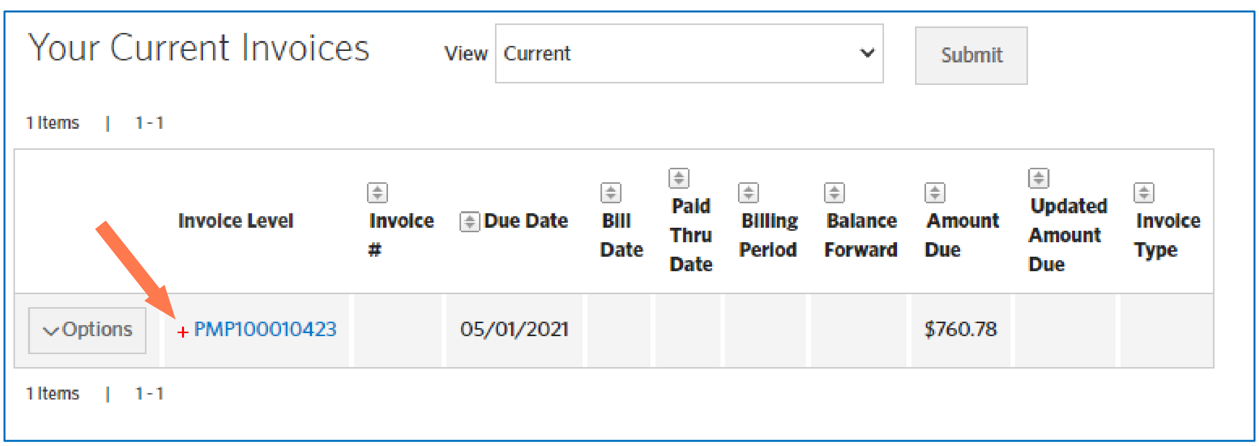


The search results display the available invoices for the entered invoice level/account number for the currently selected status type.

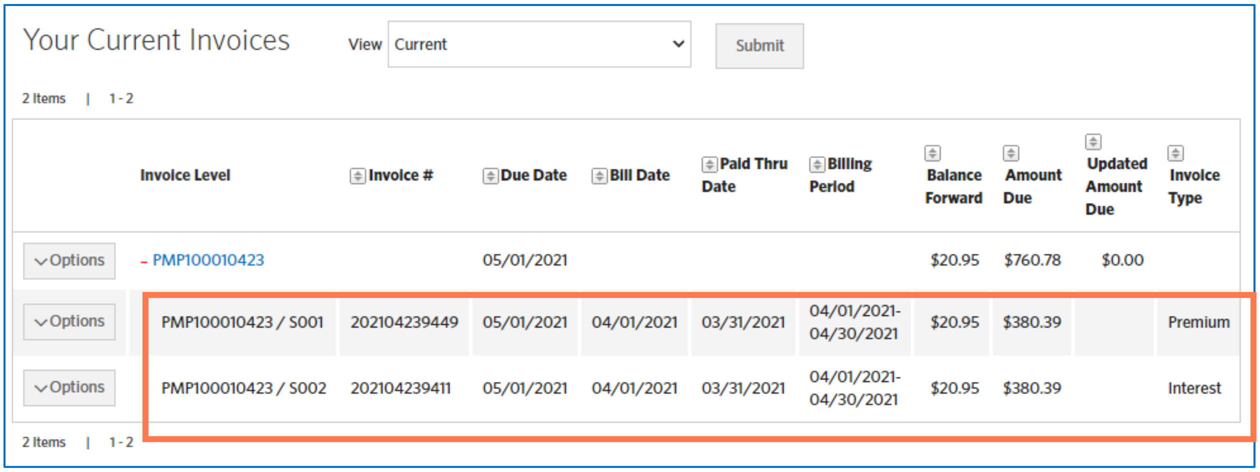


Viewing Consolidated and Sub-group Invoices

Consolidated invoices contain multiple sub-group invoices rolled into an overall group invoice. Invoices are consolidated for convenience to display a summary of all the invoices for a particular billing period. Consolidated invoice records are identified by a plus symbol (+) adjacent to the invoice level name or number, as shown in the figure below.



Click the (+) symbol to view the sub-group invoice information. The sub-group account number appears after the "/".



Your Current Invoices View Current Submit

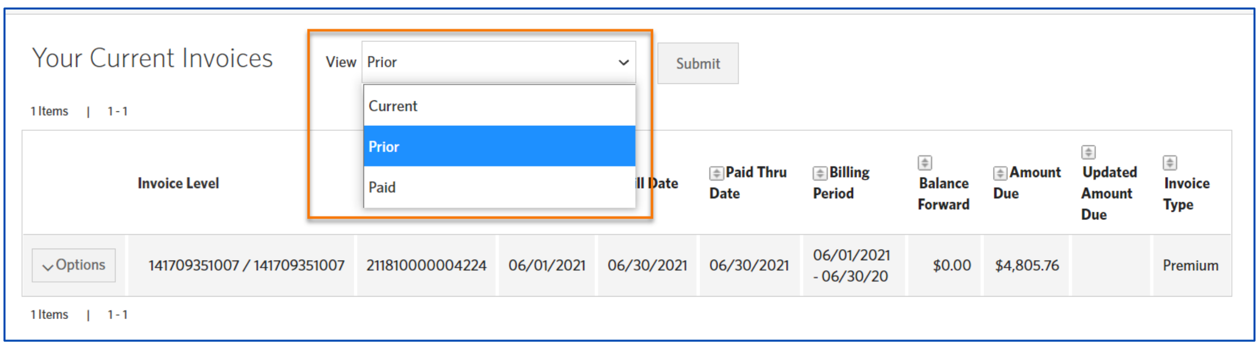
2 Items | 1 - 2

	Invoice Level	Invoice #	Due Date	Bill Date	Paid Thru Date	Billing Period	Balance Forward	Amount Due	Updated Amount Due	Invoice Type
Options	- PMP100010423		05/01/2021				$20.95	$760.78	$0.00	
Options	PMP100010423 / S001	202104239449	05/01/2021	04/01/2021	03/31/2021	04/01/2021-04/30/2021	$20.95	$380.39		Premium
Options	PMP100010423 / S002	202104239411	05/01/2021	04/01/2021	03/31/2021	04/01/2021-04/30/2021	$20.95	$380.39		Interest

2 Items | 1 - 2

Viewing Invoices by Status

The default view on the *View Invoices* page displays *Your Current Invoices*. You can easily modify the invoice list view by selecting to view a different period or category from the *View* drop-down menu and then clicking *Submit*. You can display *Current*, *Prior*, *Obsolete* or *Paid* invoices.



Your Current Invoices View Prior Submit

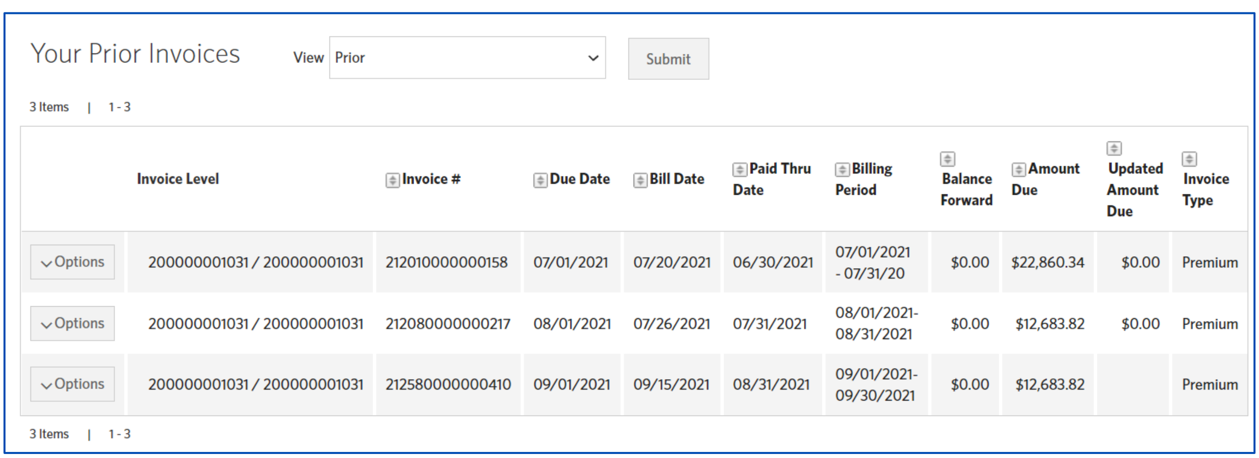
Current
Prior
Paid

1 Items | 1 - 1

	Invoice Level			ll Date	Paid Thru Date	Billing Period	Balance Forward	Amount Due	Updated Amount Due	Invoice Type
Options	141709351007 / 141709351007	211810000004224	06/01/2021	06/30/2021	06/30/2021	06/01/2021 - 06/30/20	$0.00	$4,805.76		Premium

1 Items | 1 - 1

The modified view displays.



Your Prior Invoices View Prior Submit

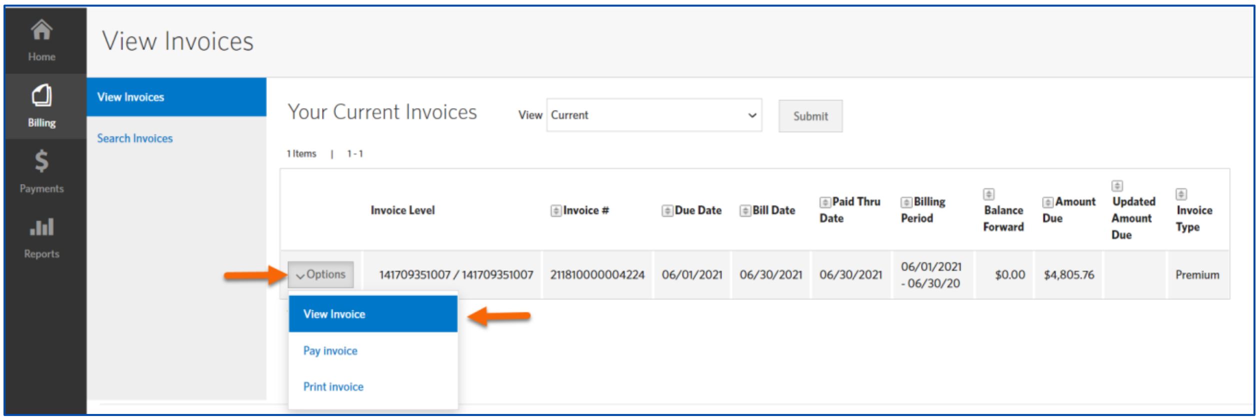
3 Items | 1 - 3

	Invoice Level	Invoice #	Due Date	Bill Date	Paid Thru Date	Billing Period	Balance Forward	Amount Due	Updated Amount Due	Invoice Type
Options	200000001031 / 200000001031	212010000000158	07/01/2021	07/20/2021	06/30/2021	07/01/2021 - 07/31/20	$0.00	$22,860.34	$0.00	Premium
Options	200000001031 / 200000001031	212080000000217	08/01/2021	07/26/2021	07/31/2021	08/01/2021-08/31/2021	$0.00	$12,683.82	$0.00	Premium
Options	200000001031 / 200000001031	212580000000410	09/01/2021	09/15/2021	08/31/2021	09/01/2021-09/30/2021	$0.00	$12,683.82		Premium

3 Items | 1 - 3

Viewing Invoice Details

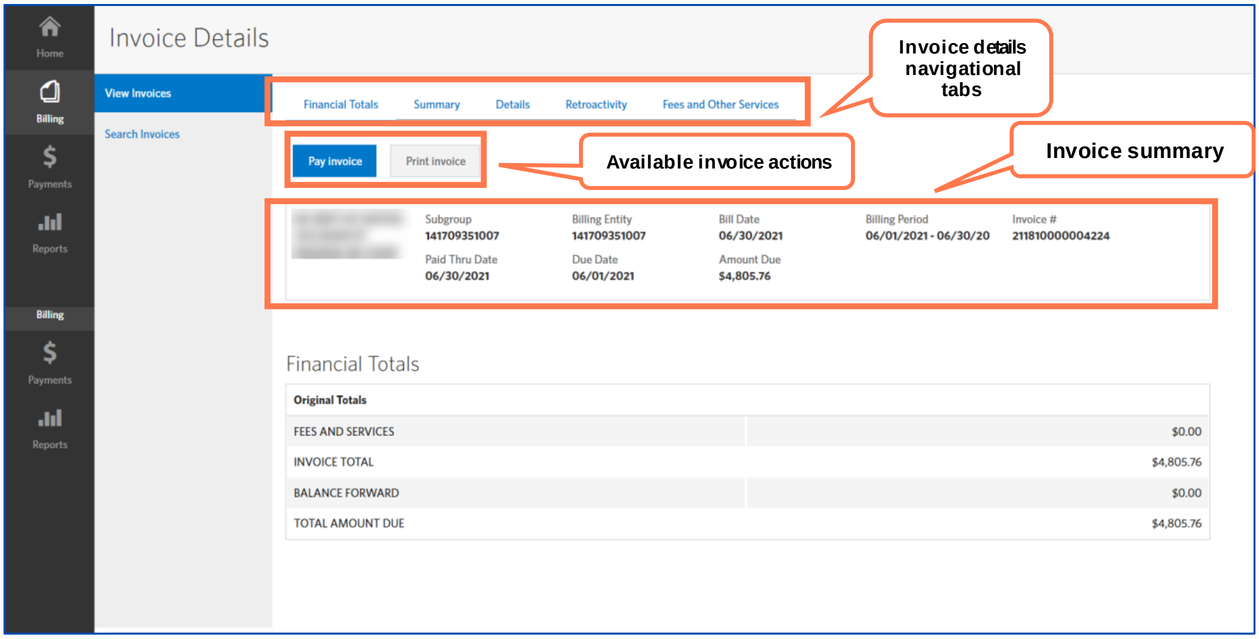
View the details of any invoice to access additional information, including financial totals, charges, retroactivity, adjustments and additional fees or charges. You can view the details of an individual invoice or consolidated/sub-group invoices. When viewing a consolidated invoice, *Consolidated Invoice View* displays in the header as a reminder. Depending on your arrangement with your carrier, you may also receive interest invoices.



To view additional details for an invoice, click *Options* and select *View Invoice* for the invoice.

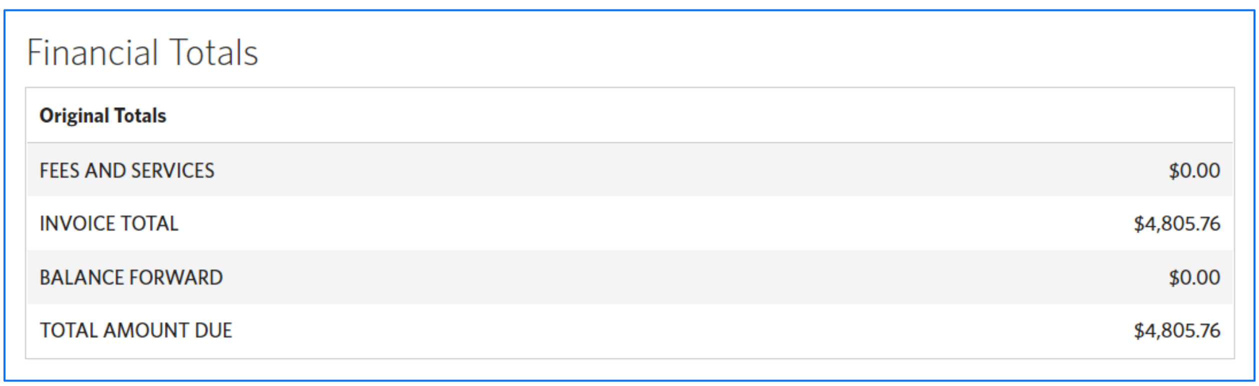
The last column on the View Invoices page, *Invoice Type*, indicates if the invoice is an invoice for *premiums* due or an invoice for interest due.

The *Invoice Details* page displays. Tabs located at the top of the page allow you to navigate to different sections of your invoice while buttons located at the top of each tab enable you to quickly jump to pages to pay or print your invoice. Summary details for the invoice are included as a header on each tab for reference, and may include the billing date, billing period, paid through date, due date and total amount due.



Invoice details and labels may vary depending on the settings established for your company. The following screens and descriptions are shown for sample purposes only.

The *Financial Totals* tab provides a summary of total costs and adjustments since the last invoice, such as retroactive adjustments, any unpaid balance (balance forward), new premium or interest charges for the current coverage period and the total amount due.


Financial Totals

Original Totals	
FEES AND SERVICES	$0.00
INVOICE TOTAL	$4,805.76
BALANCE FORWARD	$0.00
TOTAL AMOUNT DUE	$4,805.76

Click the *Summary* tab to view a breakdown of the members and cost per plan for the current period, retroactive values and combined.

CURRENT for this period			
Type	**Premium Contribution**	**Subscriber Count**	**Account Total**
CURRENT	Employee Amount	6	$1,674.00
	Employer Amount	6	$3,131.76
	Total CURRENT Premium:	**12**	**$4,805.76**
RETRO for this period			
Type	**Premium Contribution**	**Subscriber Count**	**Account Total**
RETRO	Employee Amount	0	$0.00
	Employer Amount	0	$0.00
	Total RETRO Premium:	**0**	**$0.00**
NET for this period			
Type	**Premium Contribution**	**Subscriber Count**	**Account Total**
NET	Employee Amount	6	$1,674.00
	Employer Amount	6	$3,131.76
	Total NET Premium:	**12**	**$4,805.76**
	Total Premium:	**24**	**$9,611.52**

Click the *Details* tab to view the roster of billed subscribers and additional subscriber information. This may include columns for information, such as subscriber ID, name, coverage dates, benefits package and coverage level. The table is searchable and sortable.

If the subscribers have dependents or multiple plans, the *Expand/Collapse All* buttons can be used to show/hide subscriber details.

If your group is also a eBenefitsNow client, you may be able to select *View in Enrolment* from the *Options* drop-down menu to the left of the member's name to view the employee's record in the eBenefitsNow Benefits Administrator role.

Details

Find By: Please Select | Search | Reset

6 Items | 1 - 6 | Advanced Sorting

	Subscriber ID	Last Name	First Name	Payroll No	From	Thru	Class ID	Class Description	Plan ID	Plan Description	Tobacco User	Tier	Employer Amount	Employee Amount	Total Charges
Options	102612228	ASHBY-WAGNSHP	ABBY		06/01/2021	06/30/2021	1001	FT - Active	1020S01M	SHP - Plan A - All (Non-MP)	no	Employee Only	$521.96	$25.00	$546.96
Options	102613961	ASHBY-WAGNSHP	ABBY		06/01/2021	06/30/2021	1001	FT - Active	1020S01M	SHP - Plan A - All (Non-MP)	no	Employee Only	$521.96	$25.00	$546.96
Options	102612229	ASHCRAFTTDSHP	MICHELLE		06/01/2021	06/30/2021	1001	FT - Active	1020S01M	SHP - Plan A - All (Non-MP)	no	Employee + Spouse	$521.96	$590.00	$1,111.96
Options	102612230	ASHCROFTTDSHP	SAMANTHA		06/01/2021	06/30/2021	1001	FT - Active	1020S01M	SHP - Plan A - All (Non-MP)	no	Employee + Children	$521.96	$218.00	$739.96
Options	102612232	ASHENFELTESHP	PAMELA		06/01/2021	06/30/2021	1001	FT - Active	1020S01M	SHP - Plan A - All (Non-MP)	no	Family	$521.96	$598.00	$1,119.96
Options	102612231	ASHETDMSHP	DIANA		06/01/2021	06/30/2021	1001	FT - Active	1020S01M	SHP - Plan A - All (Non-MP)	no	Employee + Children	$521.96	$218.00	$739.96

6 Items | 1 - 6

Click the *Retroactivity* tab to view the details of any retroactive adjustments that have been applied to the current invoice. The table may include columns for detail information, such as subscriber ID, name, coverage dates, product, coverage level and adjusted premiums. The table is searchable and sortable. If the subscribers have dependents or multiple plans, the *Expand/Collapse All* buttons can be used to show/hide subscriber details.

Retroactive Adjustments

Find By: Please Select | Search | Reset

1 Items | 1 - 1

Subscriber ID	Last Name	First Name	MI	Payroll No	From	Thru	Class ID	Class Description	Plan ID	Plan Description	Tobacco User	Tier	Employer Amount	Employee Amount	Total Charges
112233445	TESTETTE	MULIA	A	Misc4 EMPID_MULIA	01/01/2021	12/31/2021	001	Misc11 Class Descr	MEDICAL002CPF	Misc10 Plan Descr	Yes	PMP100010423/S001	$22.40	$24.96	$47.36

1 Items | 1 - 1

Click the *Fees and Other Services* tab to view the details of any fees that have been applied to the current invoice.

3 Items

Fee Description	Count	Amount
Fee Description 1	10	$200.10
Fee Description 2	20	$400.10
Fee Description 3	30	$600.99

3 Items

Sorting Invoices

You can sort the invoice list and some invoice details using the sort function on any column to display the records in ascending or descending order.

Your Current Invoices View Current Submit

1 Items | 1 - 1

	Invoice Level	Invoice #	Due Date	Bill Date	Paid Thru Date	Billing Period	Balance Forward	Amount Due	Updated Amount Due	Invoice Type
Options	141709351007 / 141709351007	211810000004224	06/01/2021	06/30/2021	06/30/2021	06/01/2021 - 06/30/20	$0.00	$4,805.76		Premium

1 Items | 1 - 1

Clicking on the top arrow sorts the invoice records in ascending order by the column content.

	Invoice Level	Invoice #	Due Date	Bill Date	Paid Thru Date	Billing Period	Balance Forward	Amount Due	Updated Amount Due	Invoice Type
Options	141709351007 / 141709351007	211810000004224	06/01/2021	06/30/2021	06/30/2021	06/01/2021 - 06/30/20	$0.00	$4,805.76		Premium

Clicking on the bottom arrow sorts the invoice records in descending order by the column content.

	Invoice Level	Invoice #	Due Date	Bill Date	Paid Thru Date	Billing Period	Balance Forward	Amount Due	Updated Amount Due	Invoice Type
Options	141709351007 / 141709351007	211810000004224	06/01/2021	06/30/2021	06/30/2021	06/01/2021 - 06/30/20	$0.00	$4,805.76		Premium

Click the column header name to remove the sort and display the default view.

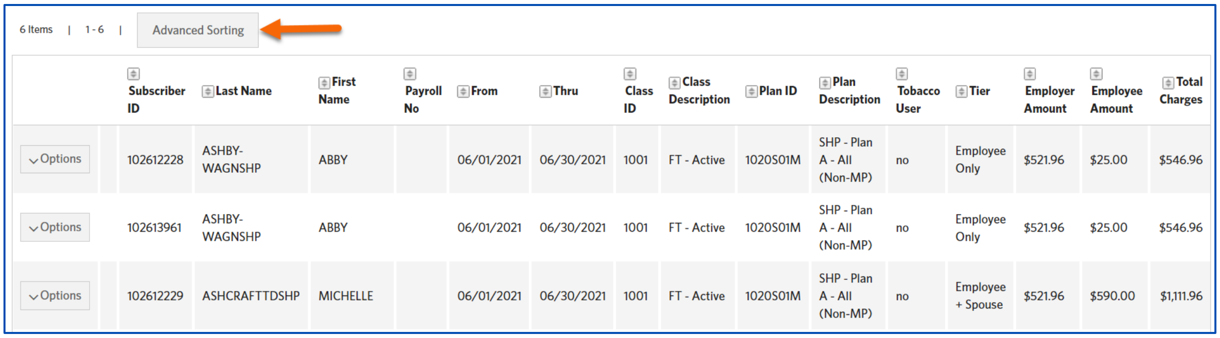
	Invoice Level	Invoice #	Due Date	Bill Date	Paid Thru Date	Billing Period	Balance Forward	Amount Due	Updated Amount Due	Invoice Type
Options	141709351007 / 141709351007	211810000004224	06/01/2021	06/30/2021	06/30/2021	06/01/2021 - 06/30/20	$0.00	$4,805.76		Premium

Advanced Sorting

Some pages that display lists with information in multiple columns include an advanced sorting feature that enables you to sort data using multiple columns and save your sorting preferences.

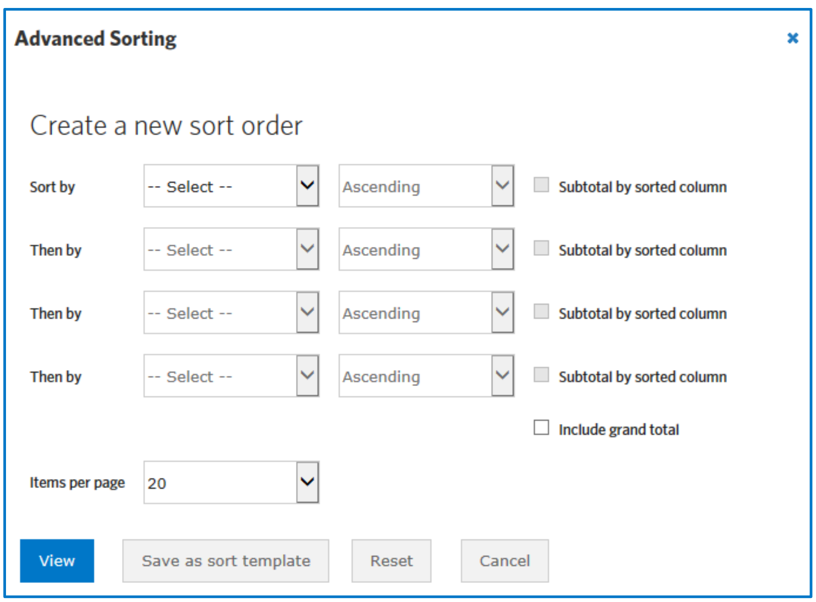
Complete the following steps to apply advanced sorting to your table.

1. Click the *Advanced Sorting* button.


6 Items | 1 - 6 | Advanced Sorting

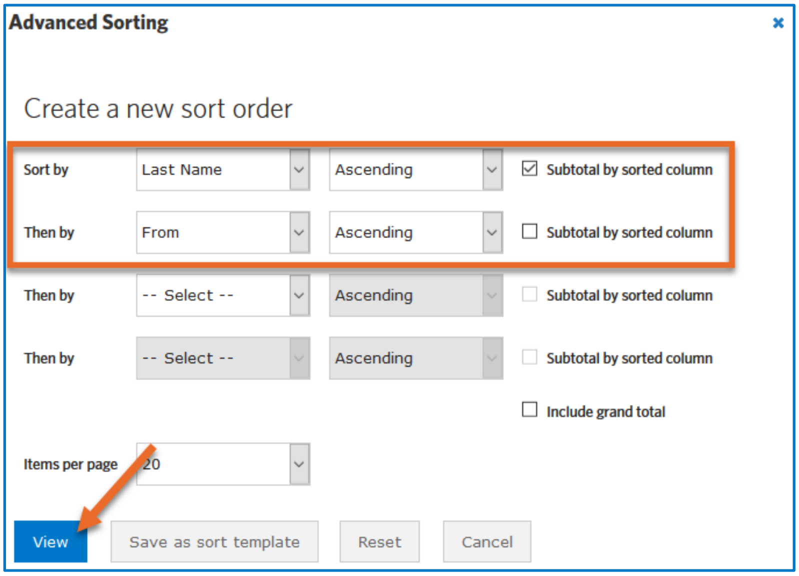
	Subscriber ID	Last Name	First Name	Payroll No	From	Thru	Class ID	Class Description	Plan ID	Plan Description	Tobacco User	Tier	Employer Amount	Employee Amount	Total Charges
Options	102612228	ASHBY-WAGNSHP	ABBY		06/01/2021	06/30/2021	1001	FT - Active	1020S01M	SHP - Plan A - All (Non-MP)	no	Employee Only	$521.96	$25.00	$546.96
Options	102613961	ASHBY-WAGNSHP	ABBY		06/01/2021	06/30/2021	1001	FT - Active	1020S01M	SHP - Plan A - All (Non-MP)	no	Employee Only	$521.96	$25.00	$546.96
Options	102612229	ASHCRAFTTDSHP	MICHELLE		06/01/2021	06/30/2021	1001	FT - Active	1020S01M	SHP - Plan A - All (Non-MP)	no	Employee + Spouse	$521.96	$590.00	$1,111.96

The *Advanced Sorting* window displays.

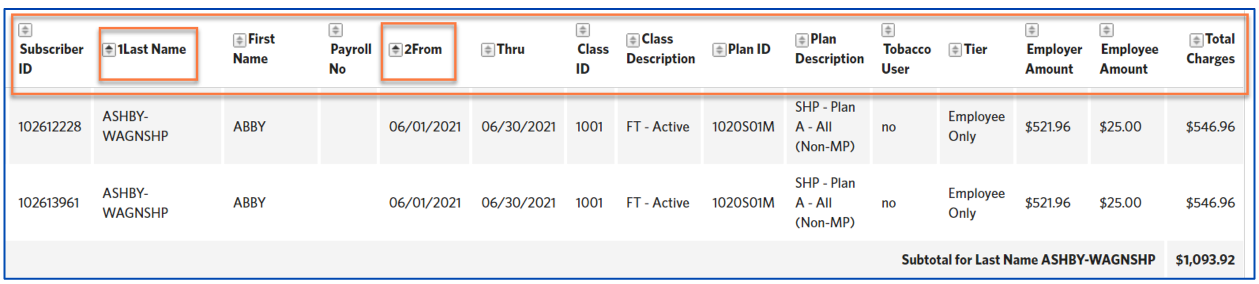


2. Select the criteria for the new sort order.

3. Click *View*.

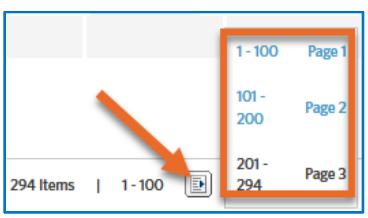


After sorting the columns, an arrow displays in the column header to indicate whether the data is sorted in ascending or descending order. The column name also includes a number to indicate the sorting order. If you selected to subtotal the columns or include the grand total, the subtotal information will display within the results set. The grand total will display at the end of the results set.

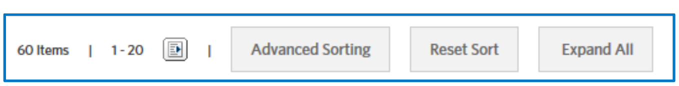


Subscriber ID	1Last Name	First Name	Payroll No	2From	Thru	Class ID	Class Description	Plan ID	Plan Description	Tobacco User	Tier	Employer Amount	Employee Amount	Total Charges
102612228	ASHBY-WAGNSHP	ABBY		06/01/2021	06/30/2021	1001	FT - Active	1020S01M	SHP - Plan A - All (Non-MP)	no	Employee Only	$521.96	$25.00	$546.96
102613961	ASHBY-WAGNSHP	ABBY		06/01/2021	06/30/2021	1001	FT - Active	1020S01M	SHP - Plan A - All (Non-MP)	no	Employee Only	$521.96	$25.00	$546.96
													Subtotal for Last Name ASHBY-WAGNSHP	$1,093.92

Depending on your search results, the data may display on multiple pages. You can use the navigation control at the bottom of the page to navigate to additional pages to see the total amounts.

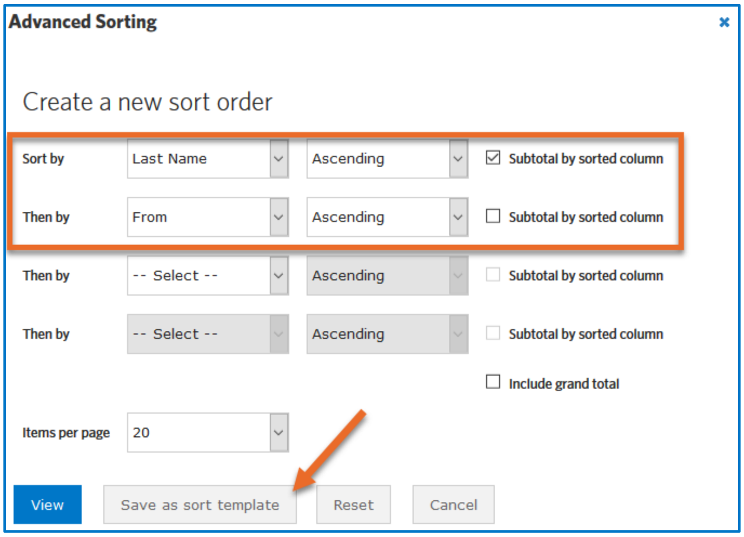


After applying an advanced sort to a page, you can click the *Reset Sort* button on the page header to clear the selected criteria.

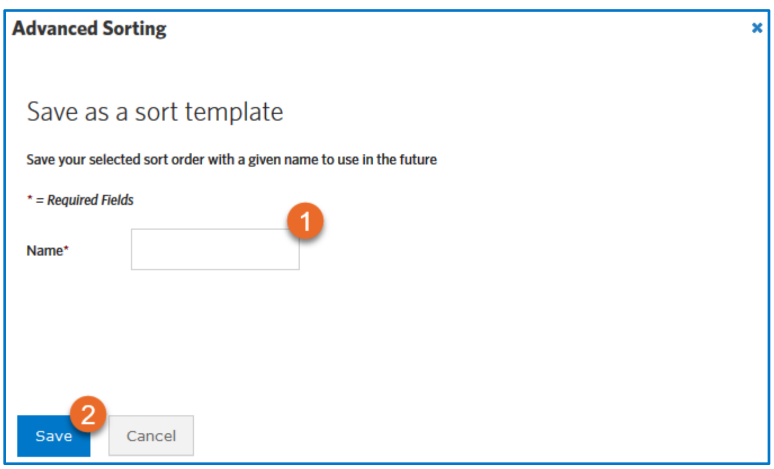


Saving and Applying Advanced Sorting Templates

When selecting your sort criteria, you can also click *Save as sort template* to create a template of a frequently used sorting order to reuse in the future.



Enter a name for the template and click *Save*.



Your sort templates will then display in the *Advanced Sorting* window. To apply the sort criteria, click *View* for the applicable template.

You can also click to *Edit* or *Delete* a sort template as necessary.

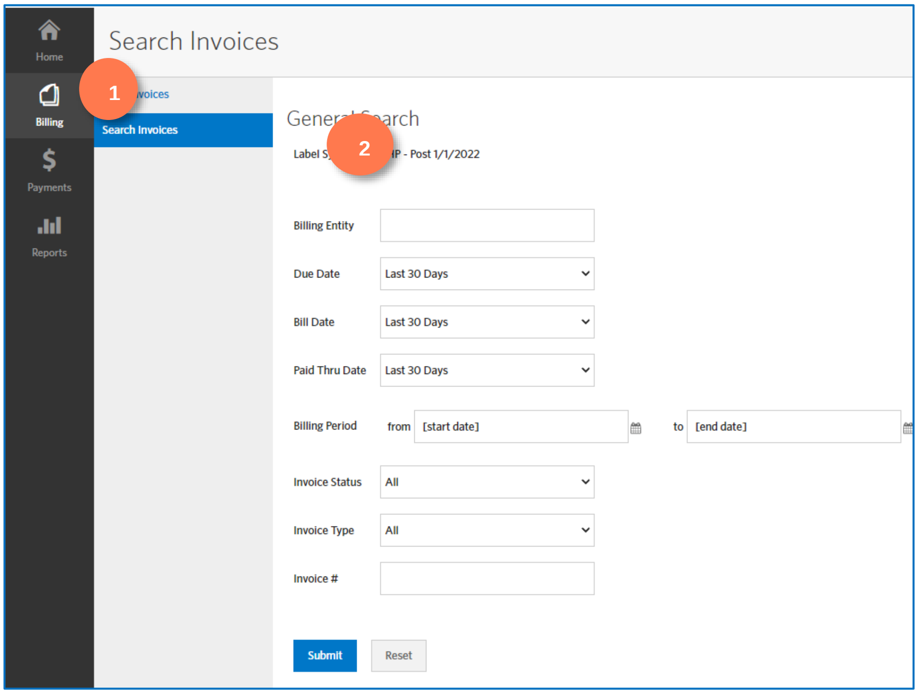
Searching for Invoices

You can perform a more advanced search or locate a specific invoice by conducting a search using the *Search Invoices* page.

Follow the steps below to search for invoices.

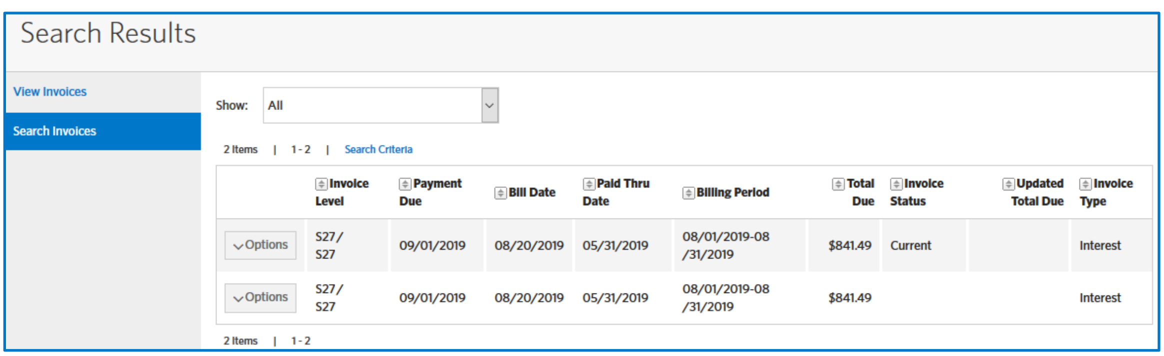
1. Click the *Billing* tab on the navigation bar. The *View Invoices* page displays.

2. Click the *Search Invoices* tab. The *General Search* page displays.



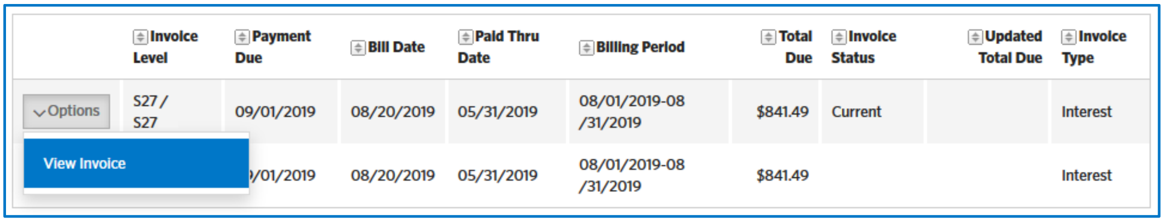
3. Enter the search criteria. You may search by account number, search for invoices whose payment due date, billing date, paid through date or billing period fall within an entered date range, by invoice status, by invoice type or a combination of those search criteria.

4. Click *Submit* to display the search results.



You can click the *Search Criteria* link above the table to view or update your search criteria.

5. Click *Options* and select *View Invoice* to view the invoice details.



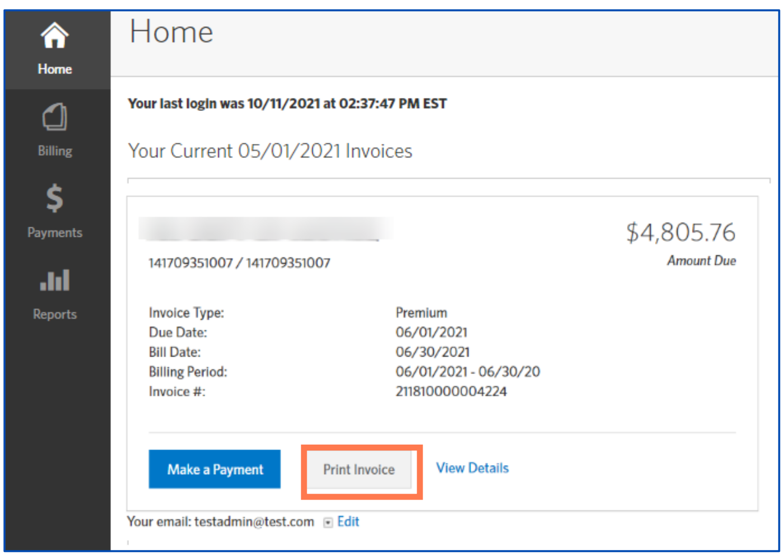
The *Invoice Details* page displays for the selected invoice. See <u>Viewing Invoice Details</u> for additional information.

Printing Invoices

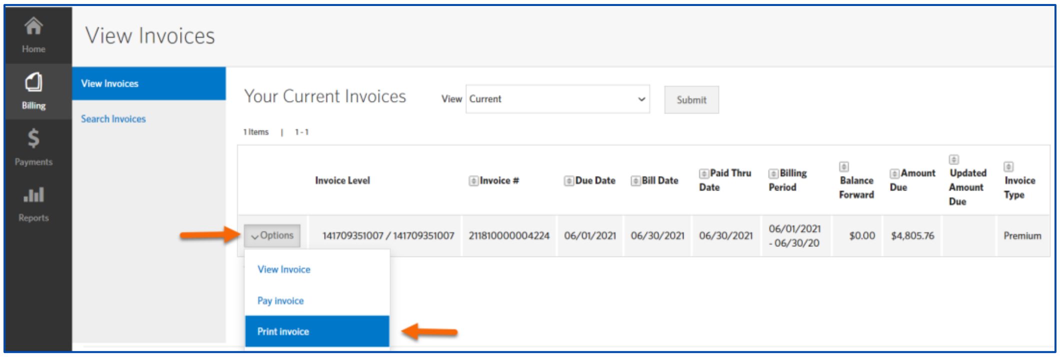
Complete the following steps to generate a printable version of your invoice.

6. Use one of the following three options to print an invoice:

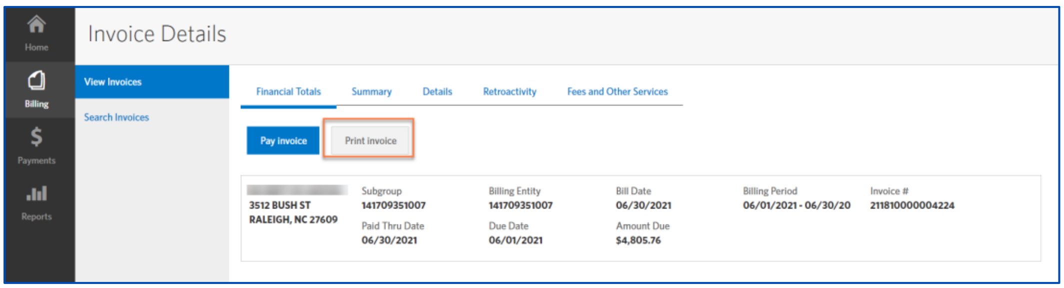
    - Click the *Print Invoices* button on the current invoice displayed on the Home page.



    - Click *Options* and select *Print Invoice* on the invoice displayed on the *View Invoices* page (for both consolidated and non-consolidated invoices).



- Click the *Print invoice* button on the *Invoice Details* page.

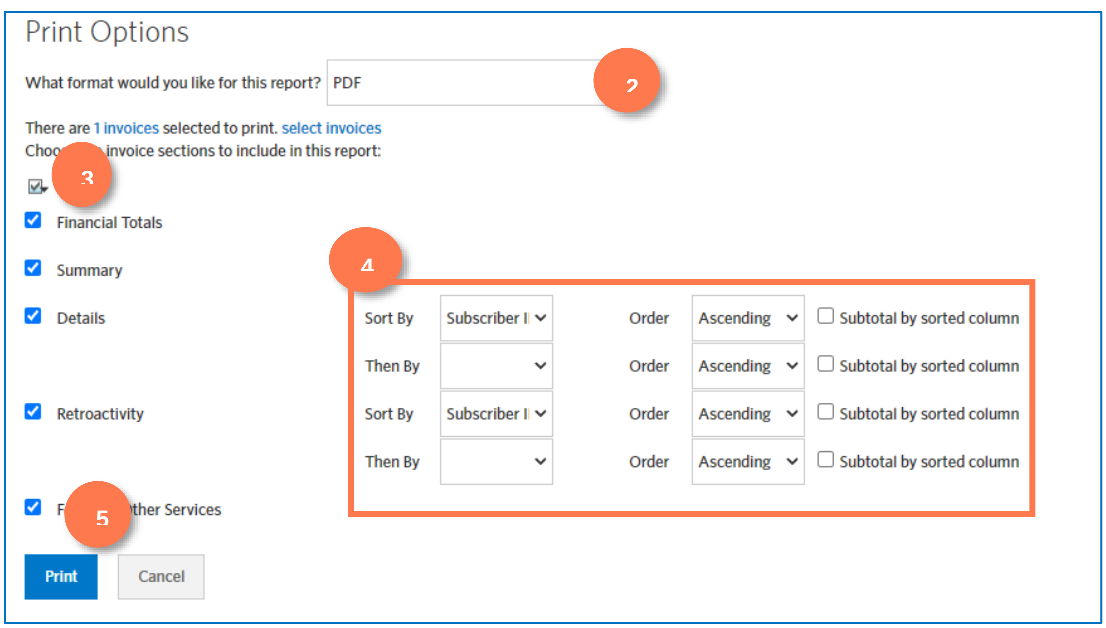


7. Select the desired format to save/print your invoice from the drop-down menu. Options include PDF, CSV or HTML.

8. Select which invoice details you would like to include.

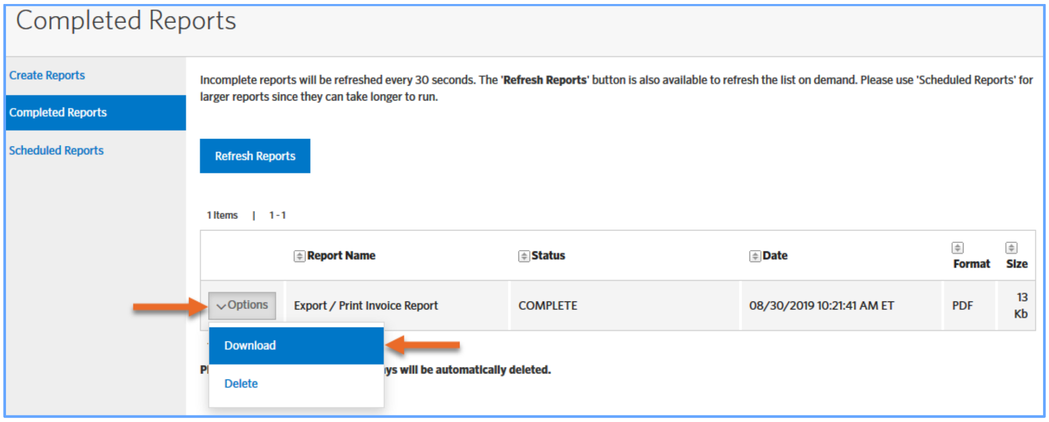
9. Select the desired sorting order for the roster if including *Details* or *Retroactivity* sections.

10. Click *Print*.



You will be navigated to the Completed Reports page where your invoice will be accessible once it has been generated in the selected format. Your report appears as *Pending* or *Running* while the system generates your results. Depending on the size and complexity of the report, it may take a few moments to generate the results. Once the report is available, the status changes to *Complete*.

11. Select *Download* from the *Options* drop-down menu to view your invoice in the selected format.



The generated invoice will be automatically deleted after seven days.

Email Notifications

You will receive email notifications for the following scenarios:

- *New Invoice* – The purpose of this email is to alert you when new invoices are available for you to view.
- *Online Payment* – The purpose of this email is to alert you when an online payment has been made in Billing & Payments (eBilling).
- *Returned Payment Email* – The purpose of this email is to alert you when your payment has been returned from its bank.
- *Delinquency Email (Warning)* – The purpose of this email is to provide notification that your account has reached the first stage of delinquency due to unpaid premiums.

Emails will be sent to the email address associated with your Billing & Payments (eBilling) account.

Chapter 3 Payments

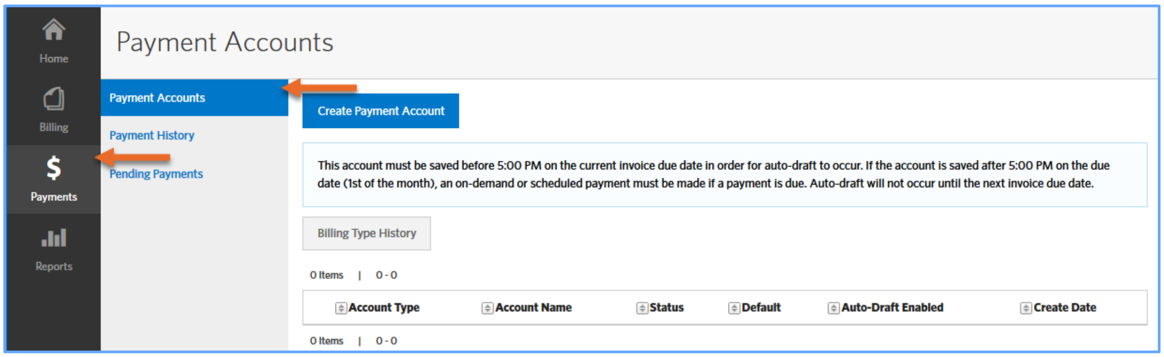
Creating and Editing Payment Accounts

Creating a Payment Account

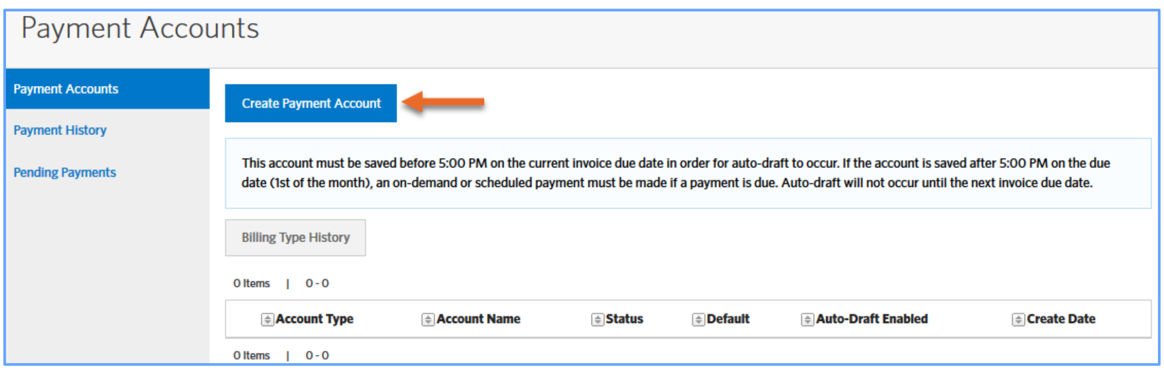
Payments may be made by a bank account via ACH transactions. You may enter and store your bank account information within Billing & Payments (eBilling) for making invoice payments. You can create multiple payment accounts as needed and select different accounts when making invoice payments. See Editing Payment Accounts on Invoices for additional information.

Follow the steps below to create a payment account.

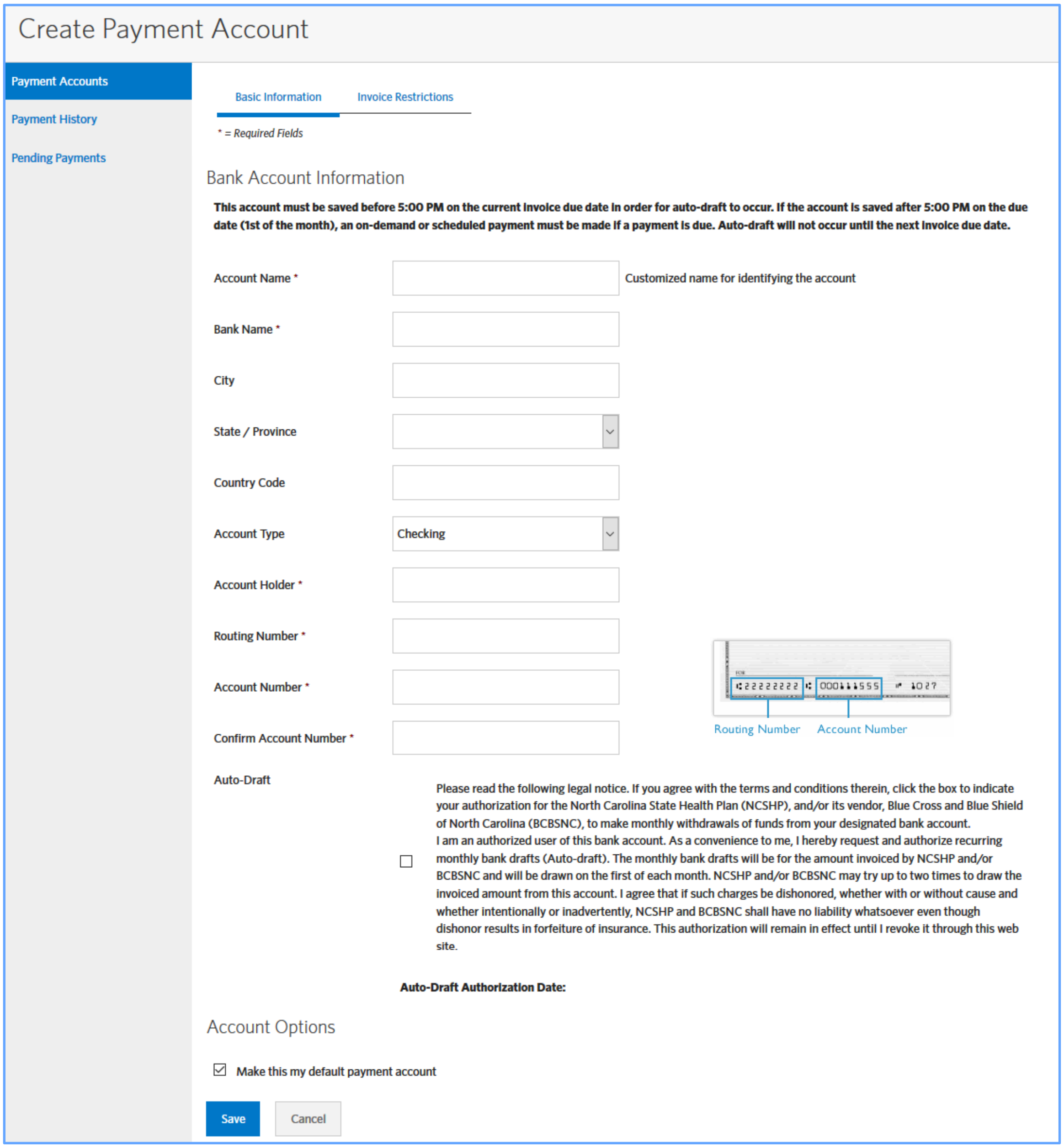
1. Click the *Payments* tab on the navigation bar. The *Payment Accounts* page displays.



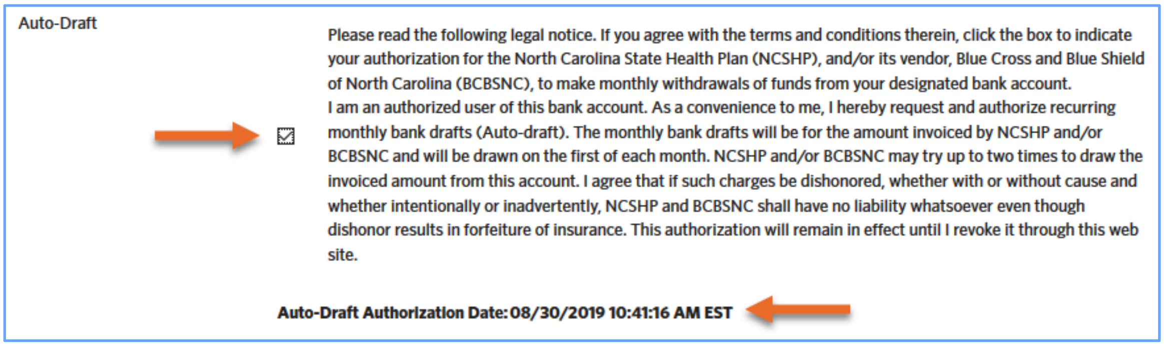
2. Click the Create Payment Account button.



3. Enter the required account information for your bank account. Debit and credit card payments are not accepted forms on online payment.



4. (If applicable) Select the checkbox in the Auto-Draft section of the page. When you select to enable the auto-draft, an Auto-Draft Authorization Date displays. Auto-draft becomes effective on the date authorized.

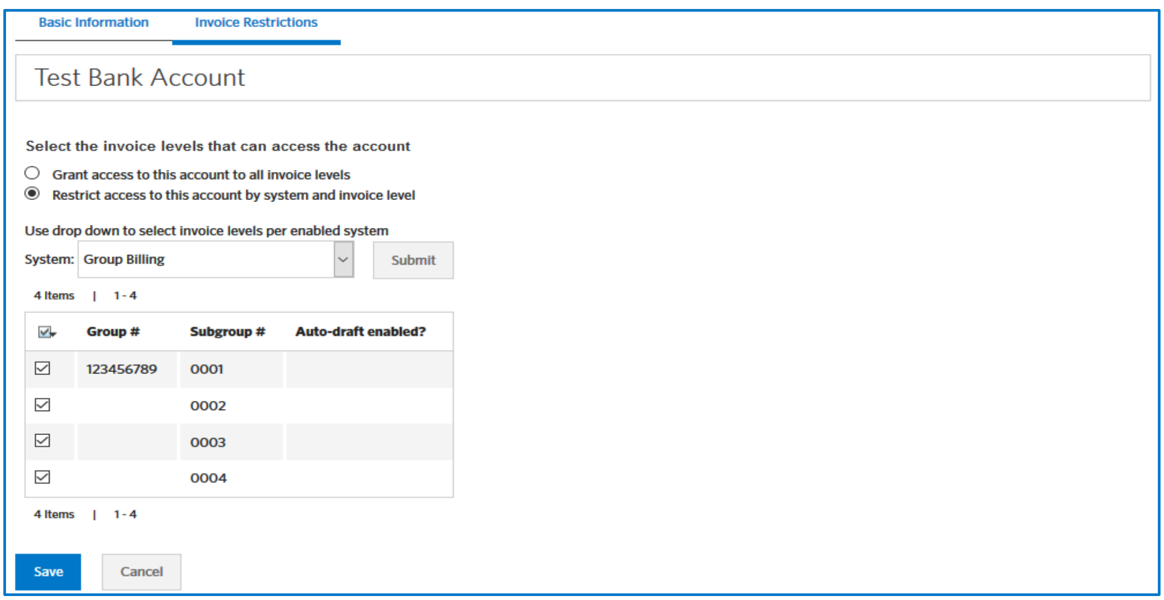


As noted on Payment Accounts page, your account information must be saved before 5:00 PM on the current invoice due date in order for auto-draft to occur. If the account is saved after 5:00 PM on the due date (1st of the month), an on-demand or scheduled payment must be made if a payment is due. Auto-draft will not occur until the next invoice due date.

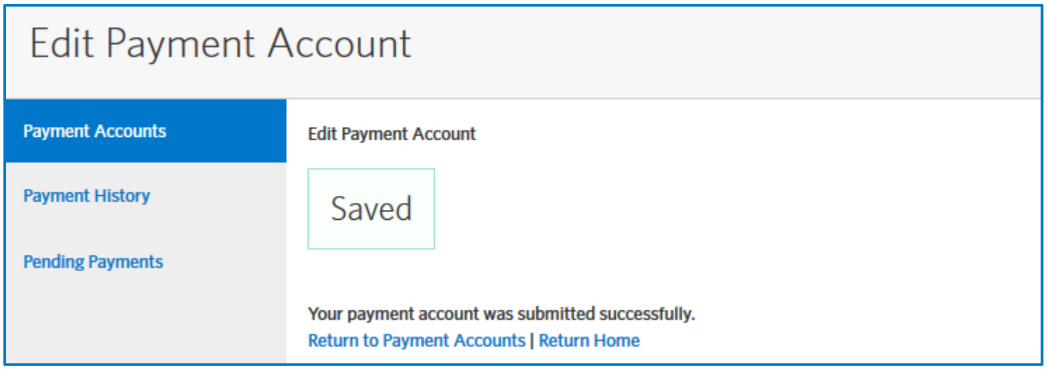
5. Select the Make this my default payment account checkbox in the Account Options section, if you want this account to be the default payment account.

6. (If applicable) Select Only I can view/edit/use this account for payment option if you want to limit the access and use of this payment account to only you.

7. (If applicable) Select the Invoice Restrictions tab, if you would like to restrict the account to only be used for specific invoices, such as for a particular billing group.



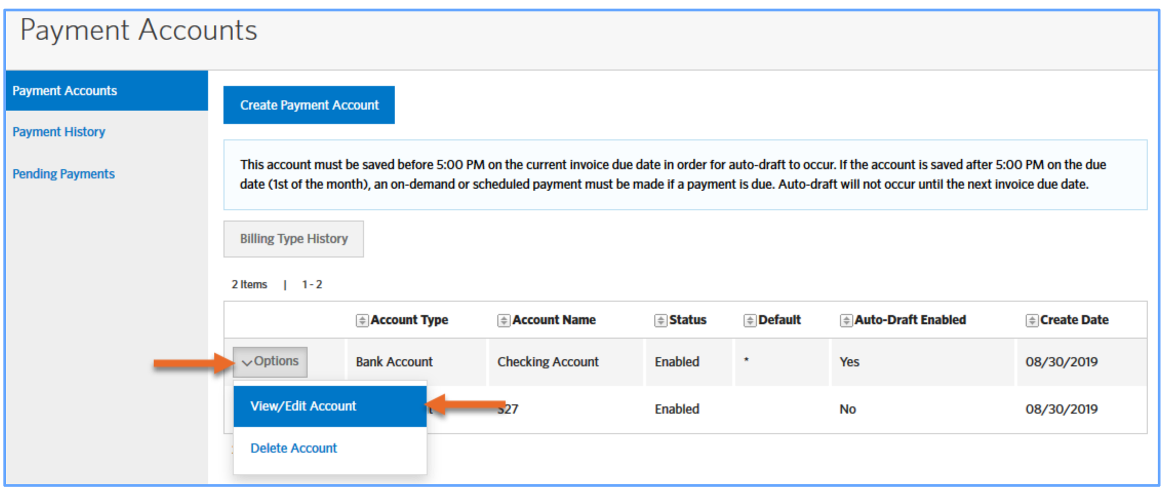
Click Save. The account information is saved and a confirmation displays.



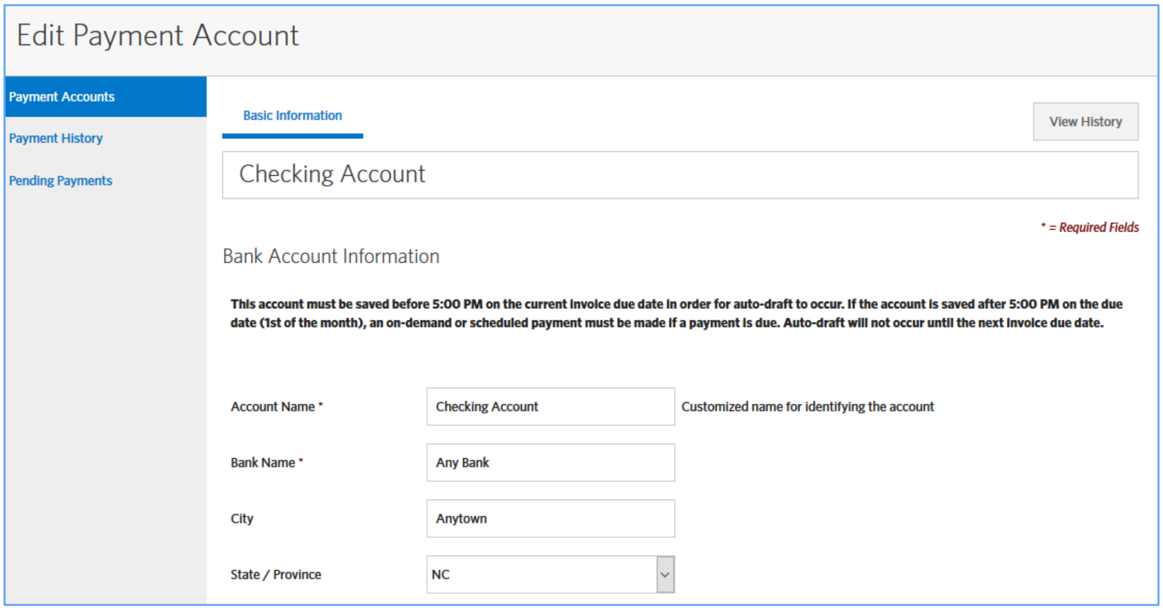
Editing a Payment Account

Follow the steps below to edit a payment account.

1. Click the Payments tab in the main navigation bar.
2. Click Options and select View/Edit Account for the account to be edited on the Payment Accounts page.



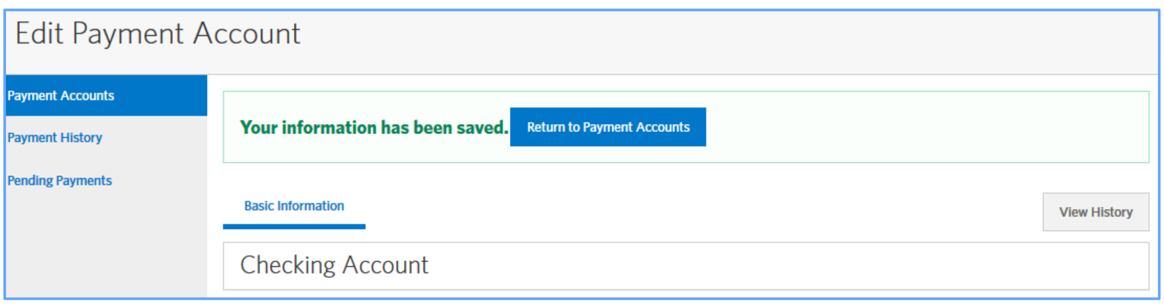
The Edit Payment Account page displays.



3. Edit the account information as necessary. See Creating a Payment Account for additional information.

   If this account is already being used to process payments, you can only change certain information, such as account type and auto-draft options.

4. Click *Save*. A confirmation displays.



Making Payments

Depending on your organization's configuration and your carrier's preferences, you may be able to pay your bill online and print a pay stub and pay your invoice by mail. The option to pay your invoice can be accessed from the home page, the View Invoices page or the Invoice Details pages.

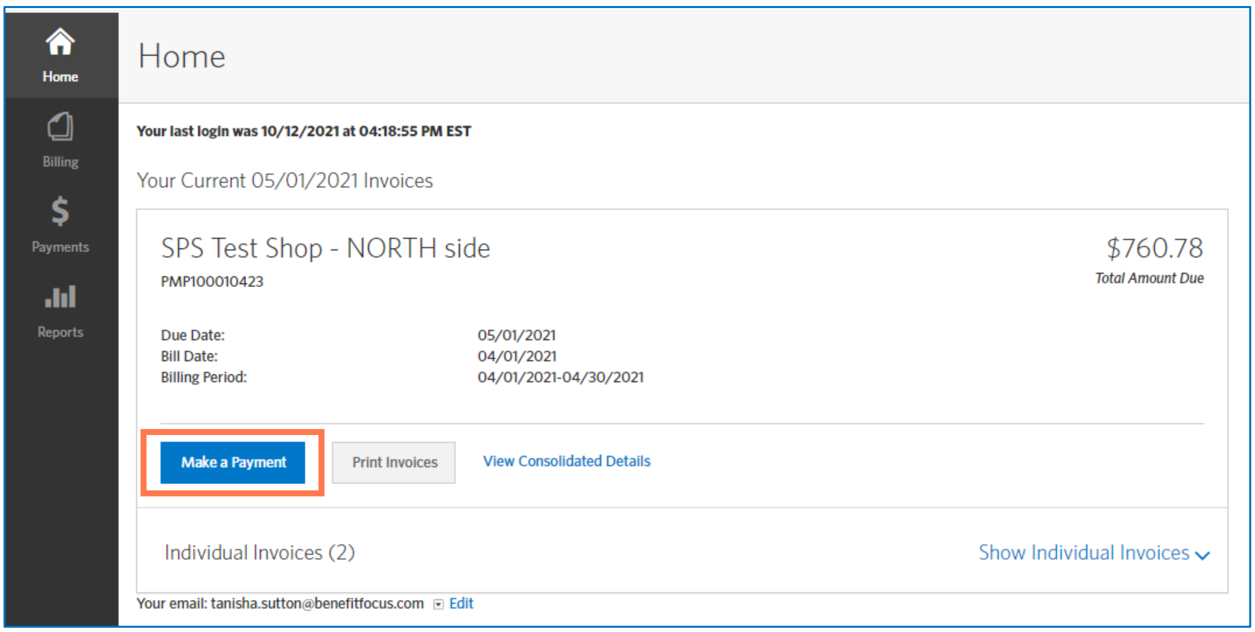
Making Online Invoice Payments

Follow the steps below to make an online invoice payment.

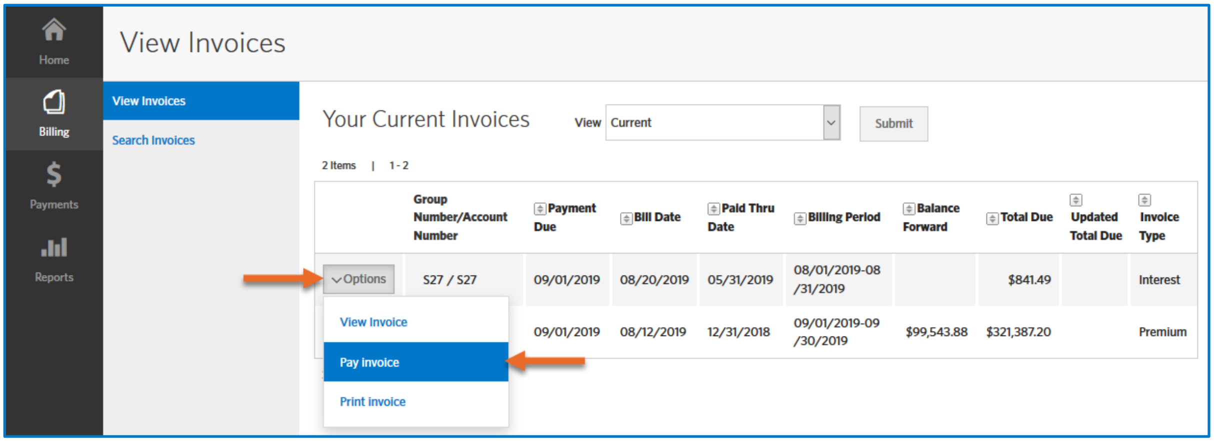
1. Initiate the invoice payment.

   Billing and Payments (eBilling) provides three ways to initiate an invoice payment:

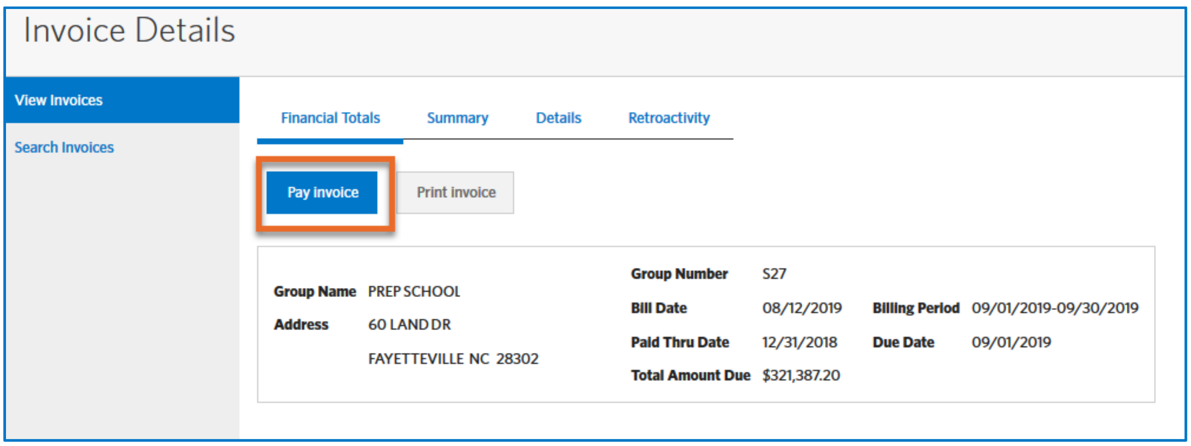
   - Click the *Make a Payment* button on the current invoice displayed on the Home page.



   - Click *Options* and select *Pay Invoice* on the invoice displayed on the *View Invoices* page (for both consolidated and non-consolidated invoices).

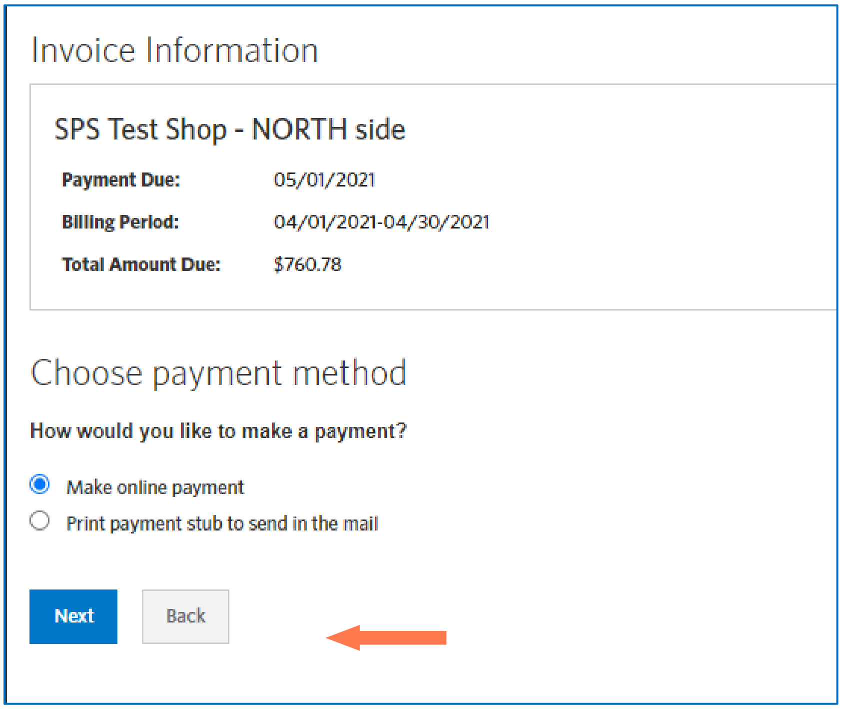


- Click the *Pay invoice* button on the *Invoice Details* page.

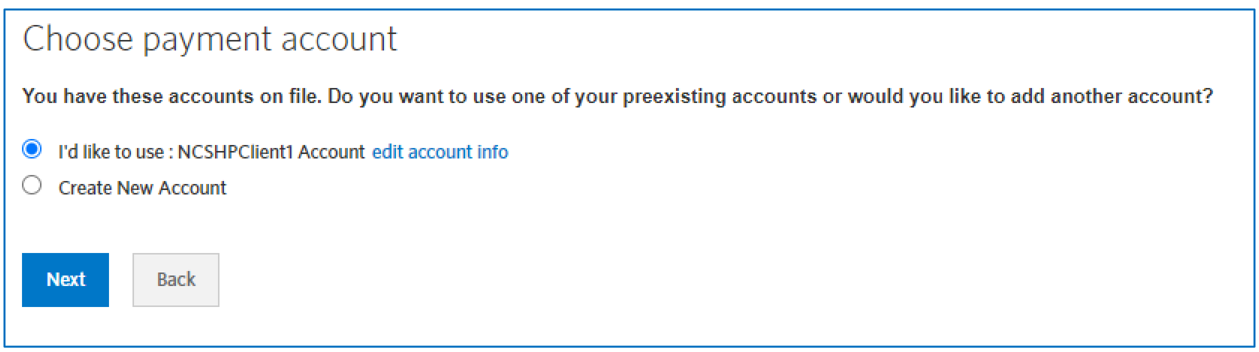


You will be navigated to the payment process page. The top of the page will indicate the current payment step followed by the invoice summary for reference.

2. (If applicable) Select *Make online payment*, then click *Next*.



3. (If applicable) Select the payment account and click *Next*.

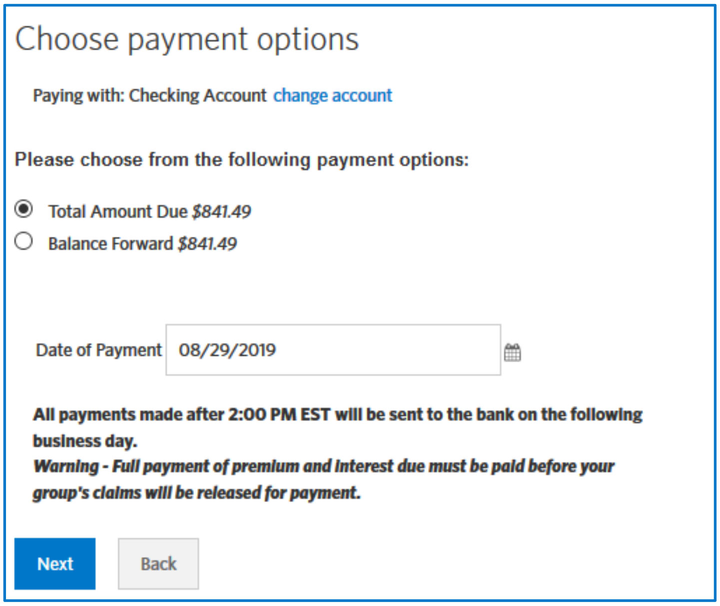


If there is not an account on file, you will be taken directly to the Create Payment Account page. Enter your bank account information, click Save and continue to step 4.
If you need to edit the existing account or add a new account, see the <u>Editing Payment Accounts on Invoice Payment</u> section.

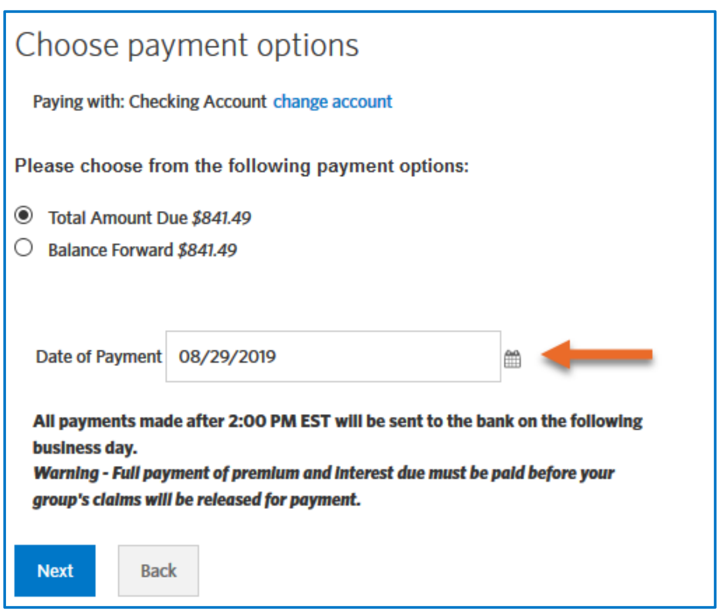
If a default payment account has been selected, this step will be skipped. You can still update your account or create a new one by selecting *change account* on subsequent pages. See the <u>Editing Payment Accounts on Invoice Payment</u> section for more information.

4. Select the payment amount. Available options will depend on preferences set by your carrier and invoice status. Some possible payment options include:

   - *Total Amount Due* – The total amount of the invoice will be paid from the designated account.
   - *Balance Forward* – The total amount of the past due amount will be paid from the designated account.
   - *Updated Amount Due* – The total amount of the updated amount will be paid from the designated account. You may see an updated invoice amount is your invoice was updated after it was billed such as for a correction.



5. Enter a payment date and click *Next*.



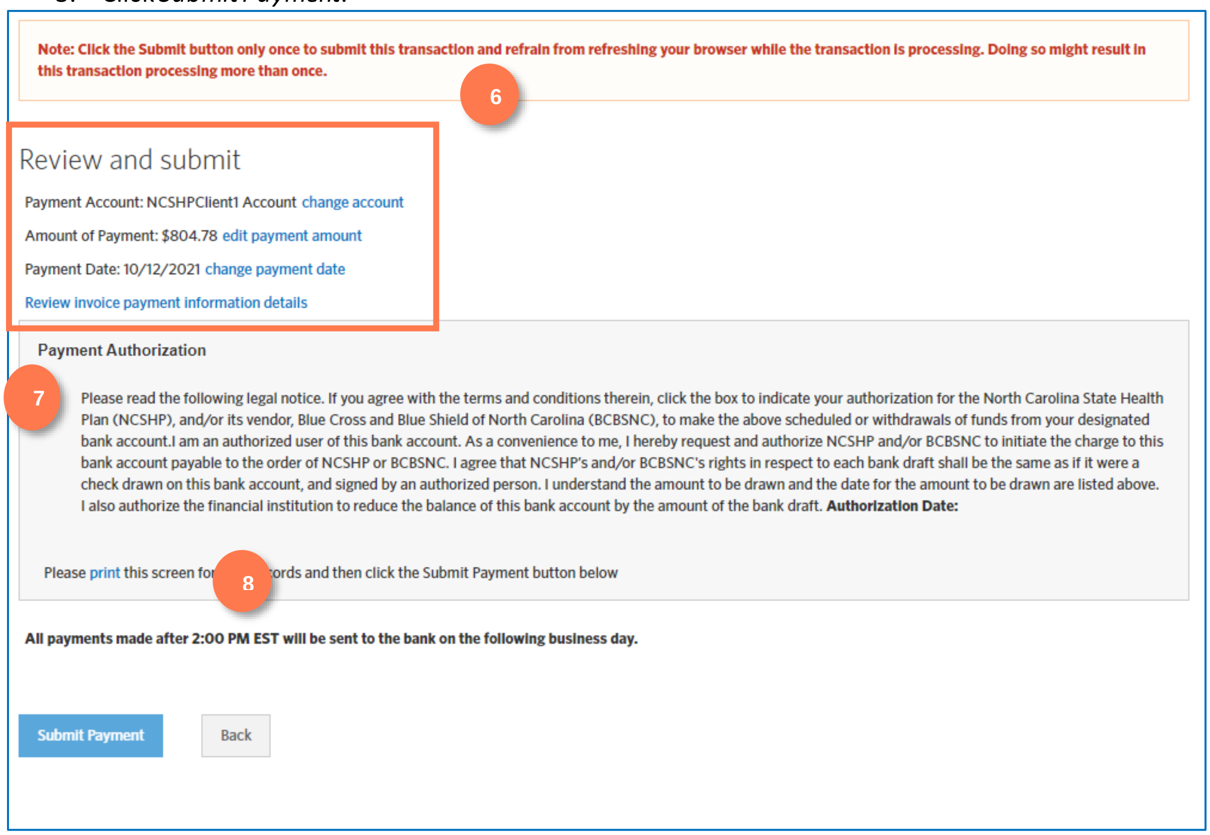
All payments made after 2:00 PM EST will be sent to the bank on the following business day.

Full payment of premium and interest due must be paid before your group's claims will be released for payment.

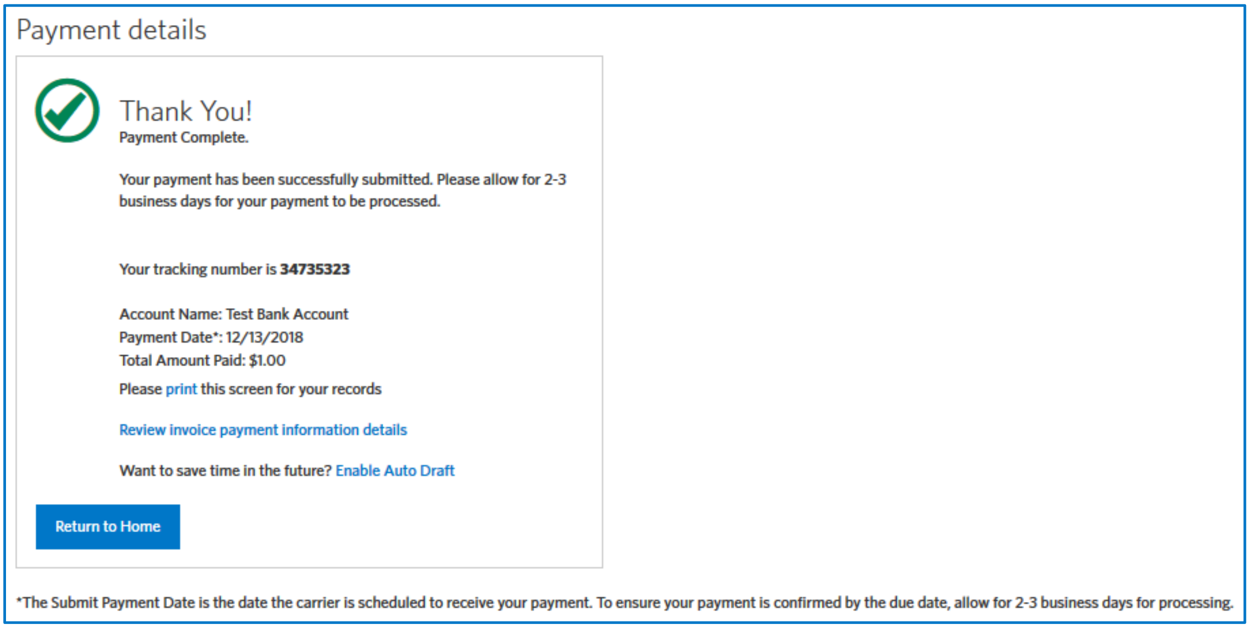
6. Review the payment information. If needed, you can modify the payment using the options in the *Review and submit* section:
   - Click the *change account* link to modify the payment account. See <u>Editing Payment Accounts</u> for additional details.
   - Click the *edit payment amount* or *change payment date* links to return to the *Choose payment options* page from which you can modify the payment amount or date.
   - Click the *Review invoice payment information details* link to display a summary of the current payment information.

7. Select the checkbox to agree to the *Payment Authorization* statement.

8. Click *Submit Payment*.

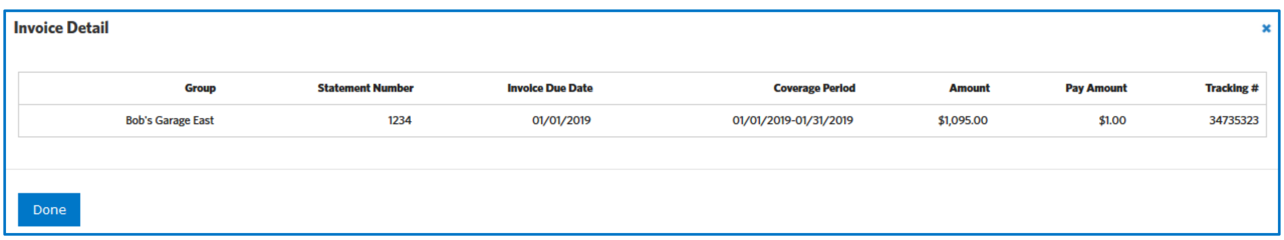


The *Payment details* page displays.



The *Payment details* section also provides several additional features.

- You can print this page to generate a hard copy or save a PDF of the payment for your records.
- Click *Review invoice payment information details* to display a summary of the current invoice details.



- Click *Enable Auto Draft* to edit your payment account. See Enabling Auto-Draft Payments for more information.

9. Click *Return to Home*.

Editing Payment Accounts on Invoice Payments

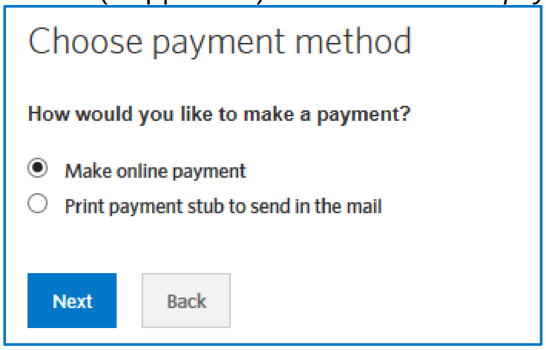
When editing payment accounts on invoices, you can update the existing account or create a new account.

Editing an Existing Account on an Invoice Payment

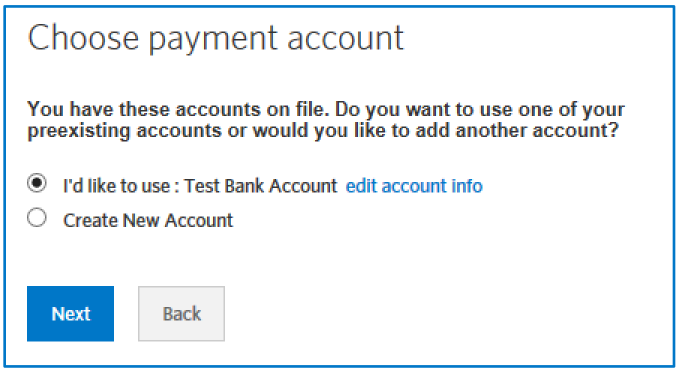
Follow the steps below to edit an existing account on an invoice payment.

1. Initiate an invoice payment. See Making Online Invoice Payments for additional information.

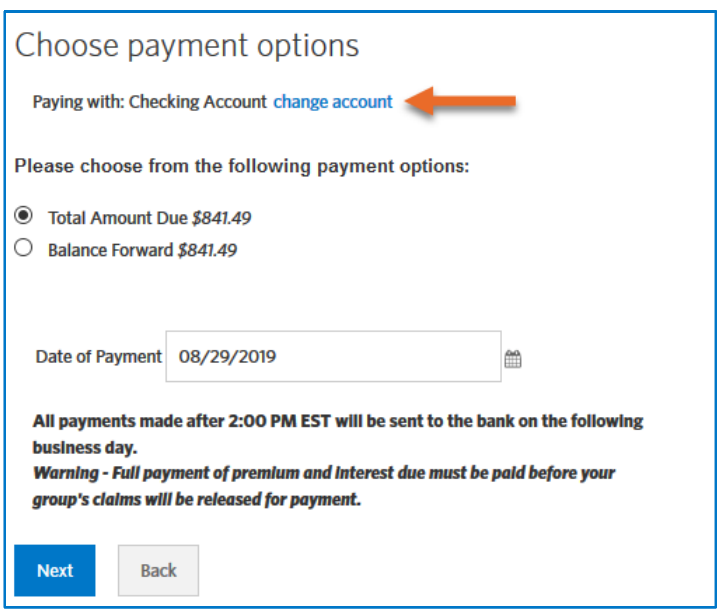
2. (If applicable) Select *Make online payment*, then click *Next*.



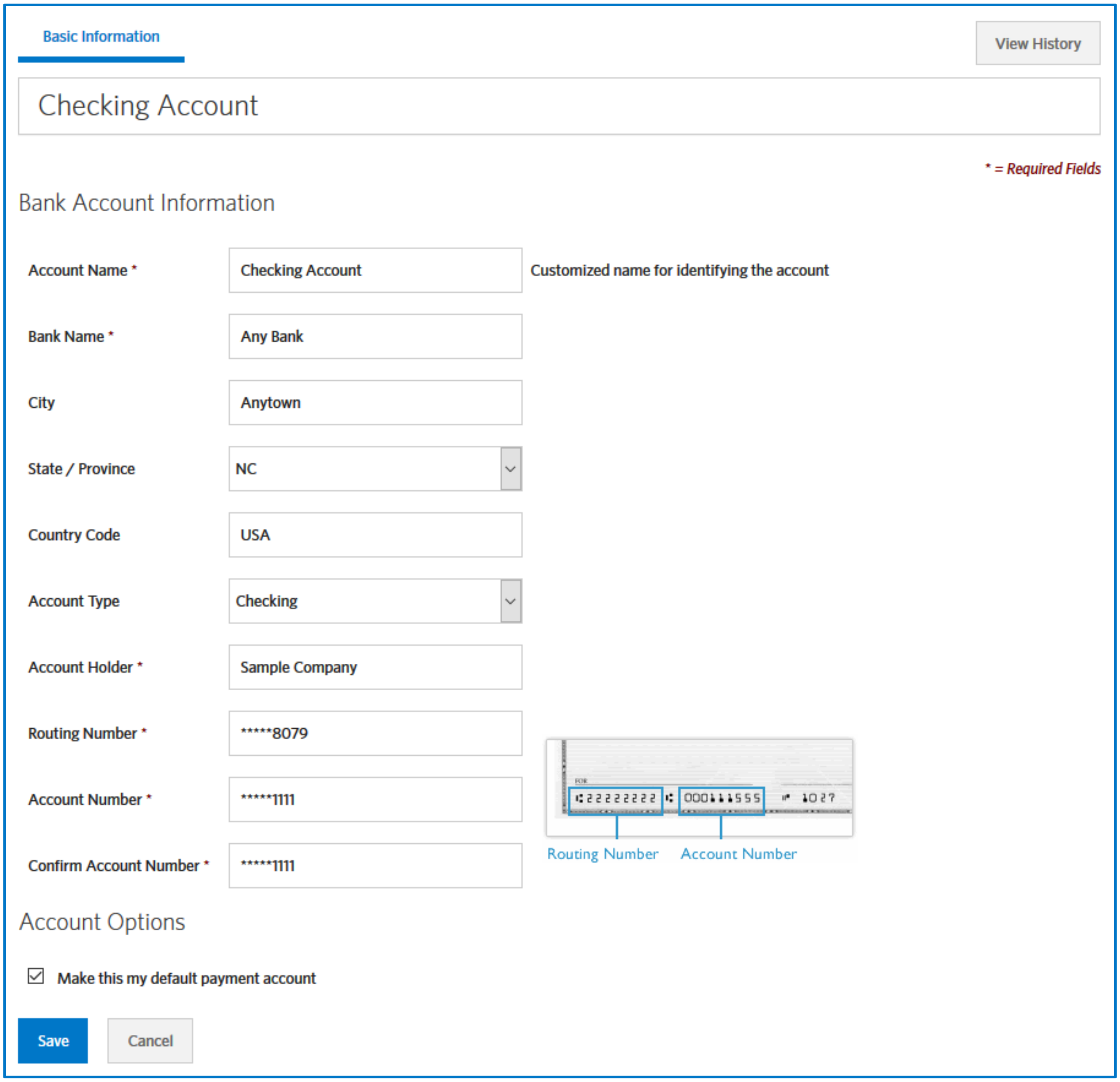
3. Click the *edit account info* link.



If a default payment account has been set, this step will be skipped. You can select *change account* from the *Choose payment options* page to access the *Choose payment account* page, if needed.



4. Edit the account information as necessary. If payments have been made using the account, you may be restricted from editing some information.



Basic Information

View History

Checking Account

* = Required Fields

Bank Account Information

Account Name *	Checking Account	Customized name for identifying the account
Bank Name *	Any Bank	
City	Anytown	
State / Province	NC	
Country Code	USA	
Account Type	Checking	
Account Holder *	Sample Company	
Routing Number *	*****8079	
Account Number *	*****1111	
Confirm Account Number *	*****1111	

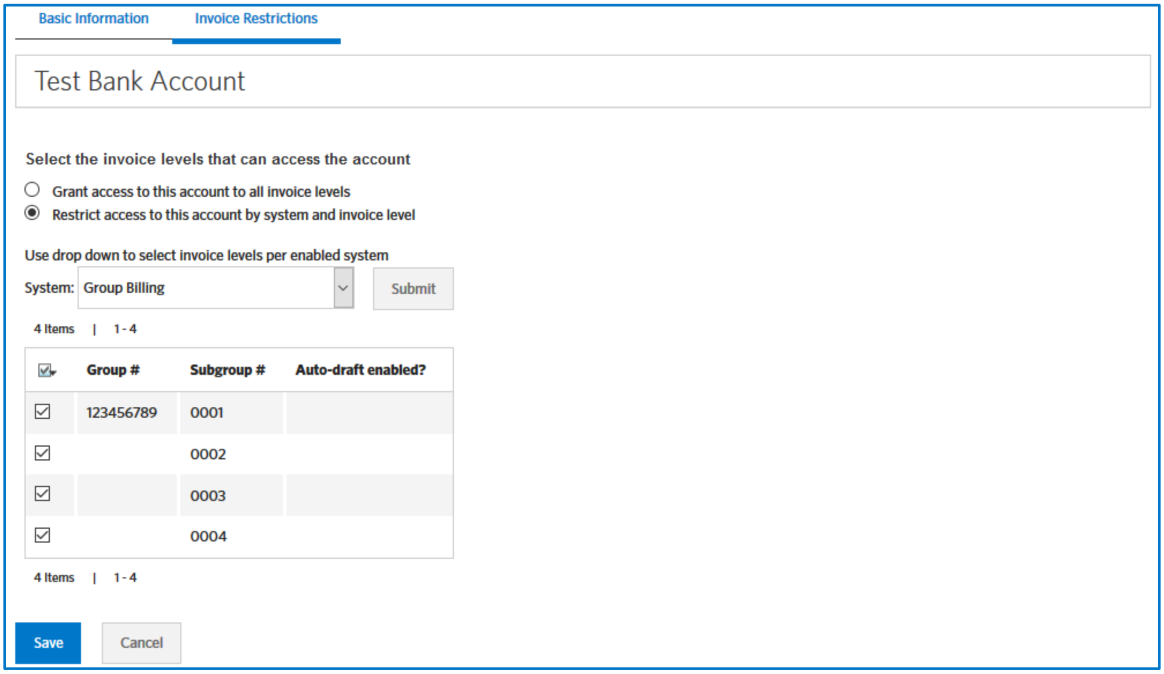
Routing Number Account Number

Account Options

☑ Make this my default payment account

Save Cancel

If you have more than one billing group, you can select which group's invoices can be paid with the account under the *Invoice Restrictions* tab.

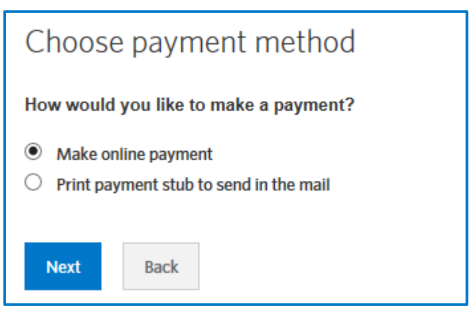


5. Click *Save*.

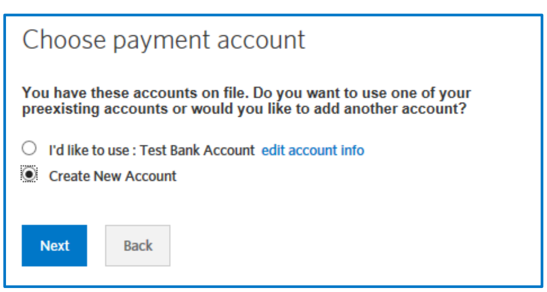
Creating a New Account on an Invoice Payment

Follow the steps below to create a new account on an invoice payment.

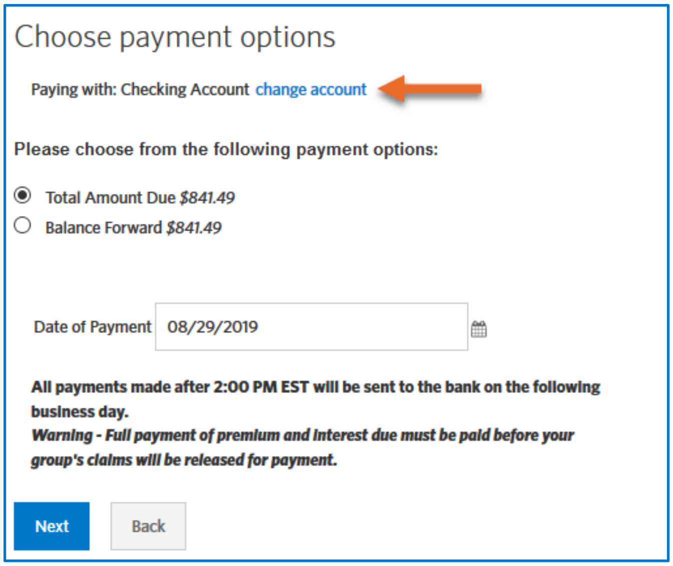
1. Initiate an invoice payment. See Making Online Invoice Payments for additional information.
2. (If applicable) Select *Make online payment*, then click *Next*.



3. Select the *Create New Account* option and then click *Next*.

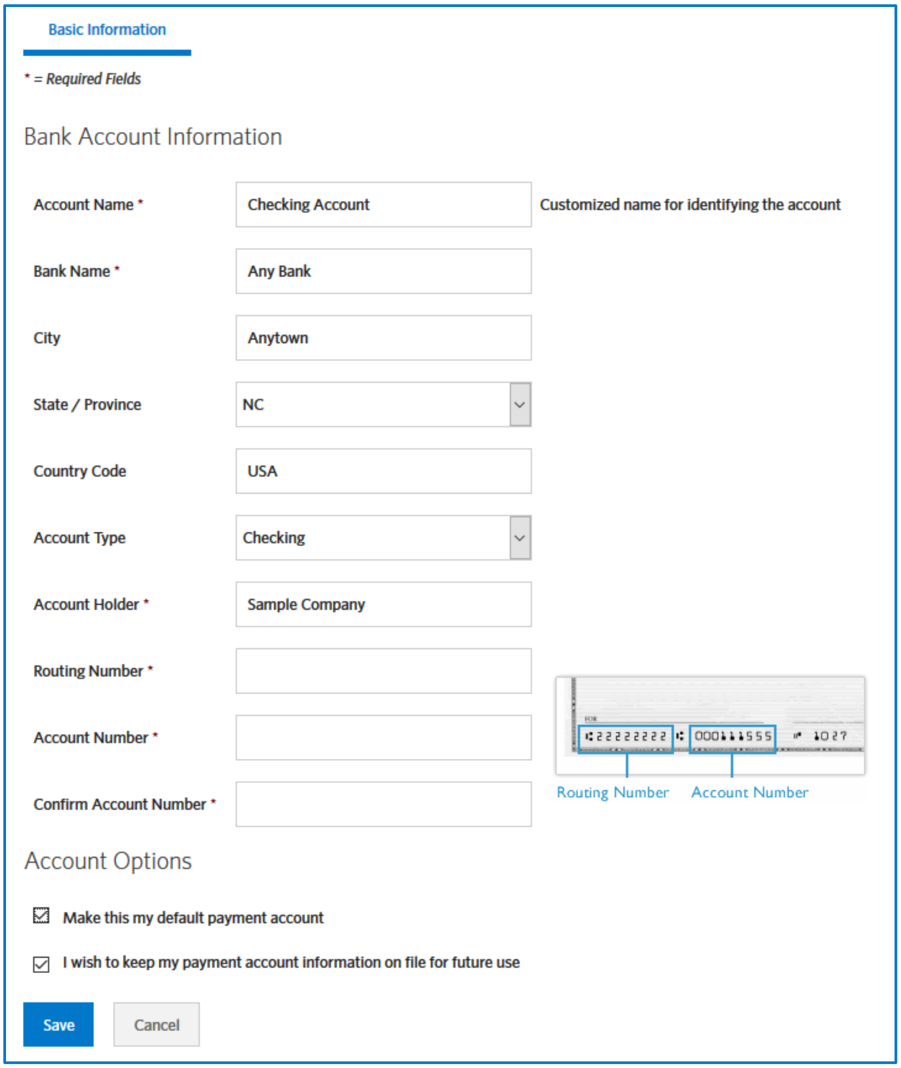


If a default payment account has been set, this step will be skipped. You can select *change account* from the the *Choose payment options* page to access the *Choose payment account* page, if needed.



4. Enter the required bank account information. (Credit card and debit card payments are not accepted for this configuration.) Required fields are indicated by an asterisk (*). Navigate to additional tabs, if necessary.

The *I wish to keep my payment account information on file for future use* checkbox is selected by default. Deselect this option if you do not want to store the account information for future payments.



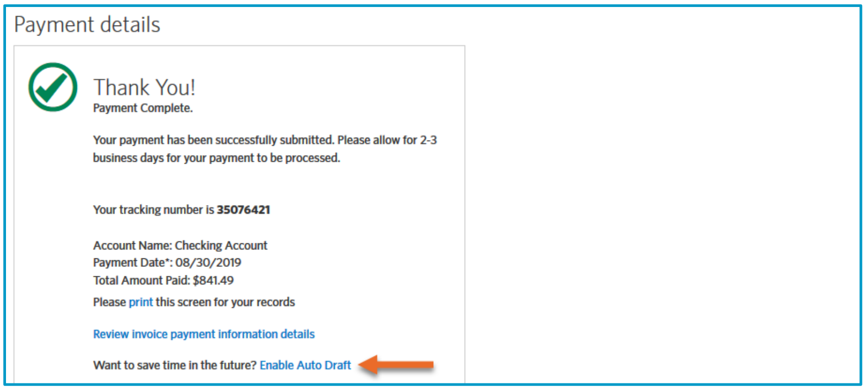
5. Click *Save*. The Invoice Information displays the new account.

Enabling Auto-Draft Payments

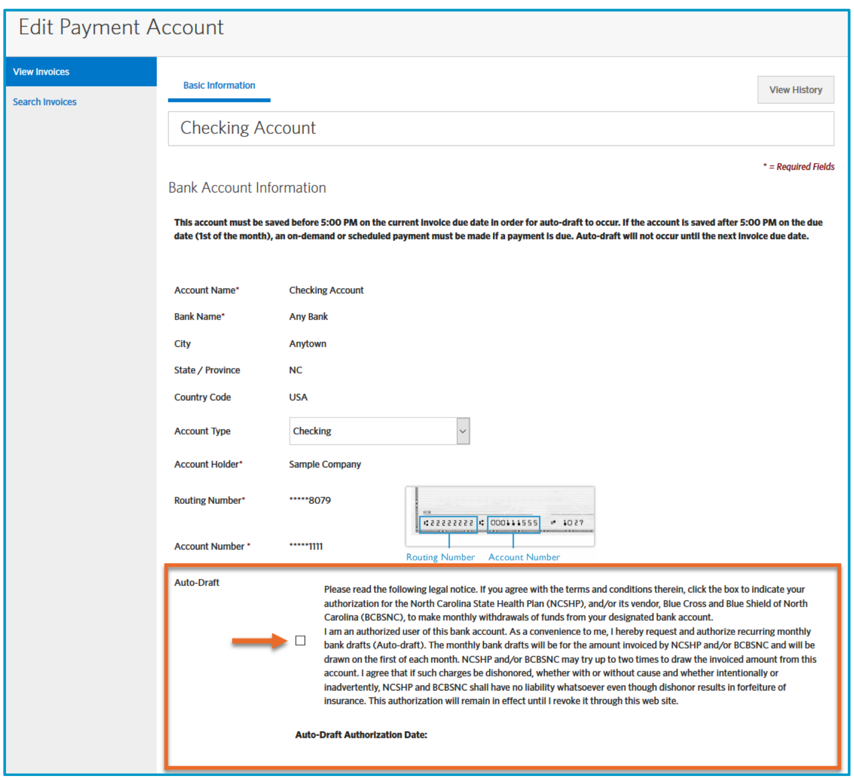
After completing an online payment, you can set up the payment account to automatically draft the invoice amount for each due date. When you complete a payment, the *Payment details* display a confirmation message from which you can enable auto-drafts. (See <u>Making Online Invoice Payments</u> for additional information.)

Follow the steps below to enable auto-draft payments.

1. Click *Enable Auto Draft* in the *Payment details* section after successfully completing payment.



2. Select the checkbox in the *Auto-Draft* section of the *Edit Payment Account* page.



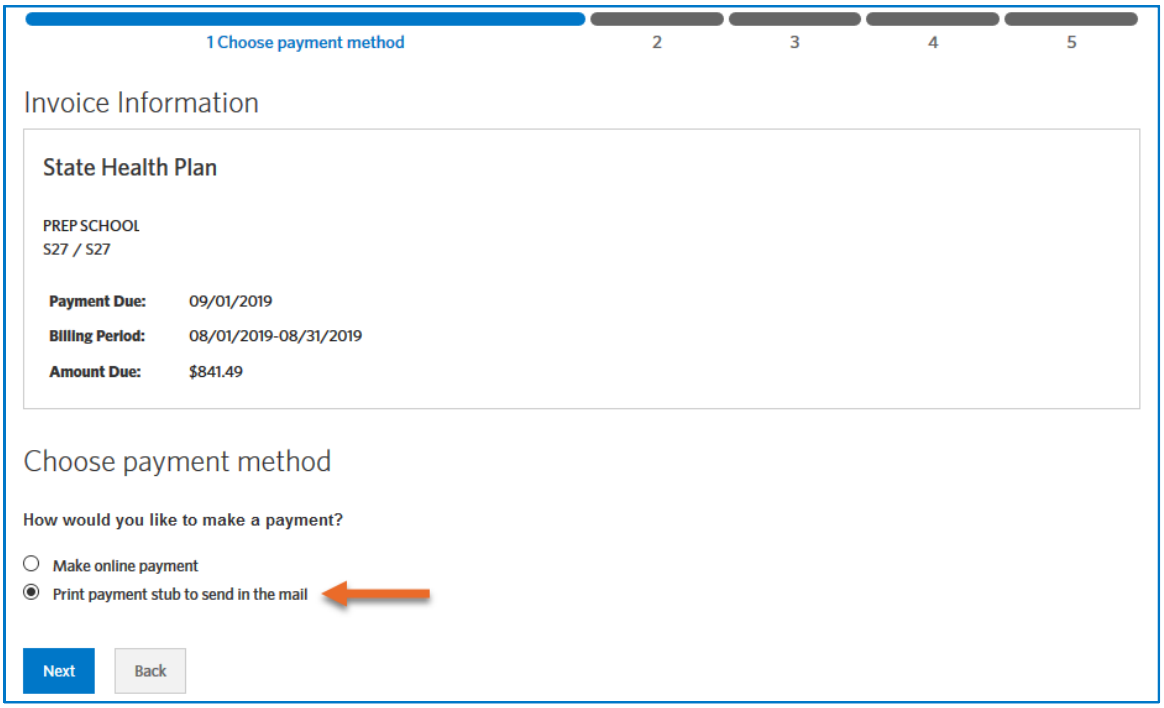
When you select to enable the auto-draft, an *Auto-Draft Authorization Date* displays. Auto-draft will be effective the date that it is authorized.

3. Click *Save*. A confirmation message displays.

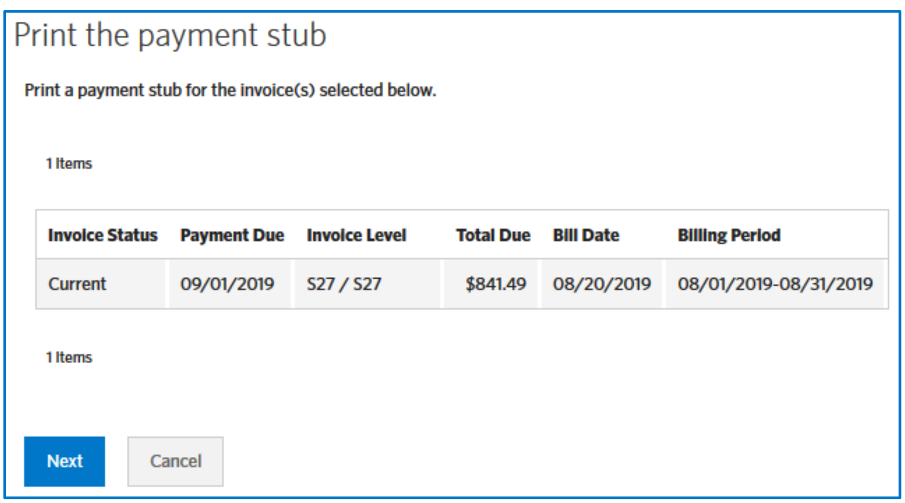
Printing Payment Stubs for Mailing Payments

Follow the steps below to print payment stubs for mailing payments.

1. Initiate the invoice payment. See *Making Online Invoice Payments* for additional information.
2. (If applicable) Select *Print payment stub to send in the mail* on the *Choose payment method* page and click *Next*.



The *Print the payment stub* page is displayed.



If you are paying a consolidated bill, you may select the individual invoices to be included in the payment.

Print the payment stub

Print a payment stub for the invoice(s) selected below.

2 Items

☑	Payment Due Date	Invoice #	Total Amount Due	Invoice Date	Billing Period
☐	02/01/2017	5435	$2,449.35	01/15/2017	02/01/2017-02/28/2017
☐	02/01/2017	6578	$13,197.02	01/15/2017	02/01/2017-02/28/2017

2 Items

Next Cancel

3. Click *Next*. A PDF of the payment stub is generated.

BlueCross BlueShield of North Carolina | North Carolina State Health Plan for Teachers and State Employees — A Division of the Department of State Treasurer

Subgroup	PMP100010423	Invoice Type	Interest
Billing Entity	S002	Bill Date	04/01/2021
Invoice Number	202104239411	Payment Due	05/01/2021
Payment Covers	04/01/2021 - 04/30/2021	Total Due:	380.39

Please retain top portion for your records

Please tear off the bottom portion of this page and return with your payment

BlueCross BlueShield of North Carolina | North Carolina State Health Plan for Teachers and State Employees — A Division of the Department of State Treasurer

Subgroup	PMP100010423	Invoice Type	Interest
Billing Entity	S002	Bill Date	04/01/2021
Invoice Number	202104239411	Payment Due	05/01/2021
Payment Covers	04/01/2021 - 04/30/2021	Total Due:	380.39
		Write Amount Paid Here	

4. Print the payment stub and submit to the address on the invoice.

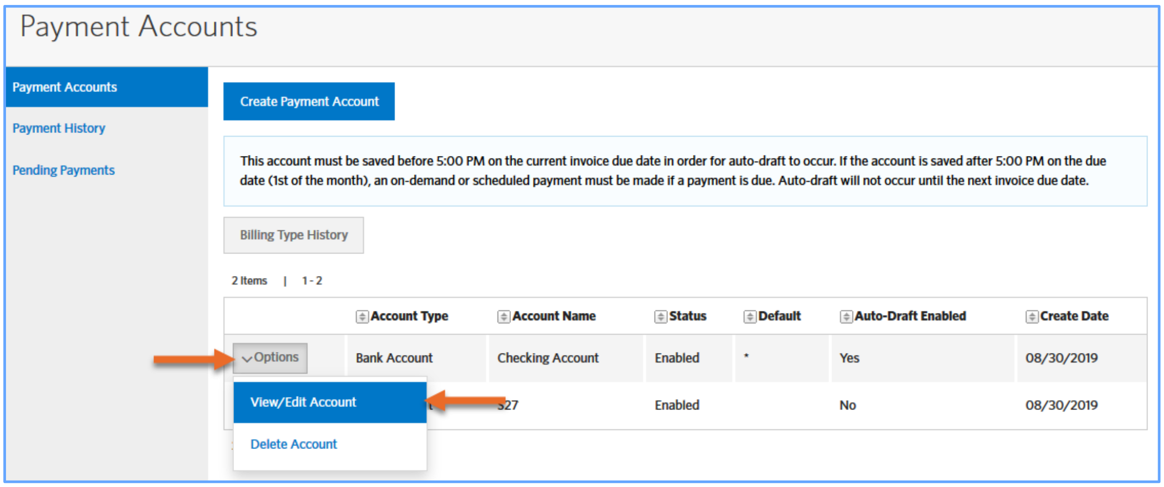
Reviewing Payment Account History

Billing & Payments (eBilling) maintains an audit history on all payment accounts. If your Billing & Payments (eBilling) user account is configured with the appropriate permissions, you can view the audit history of any payment account.

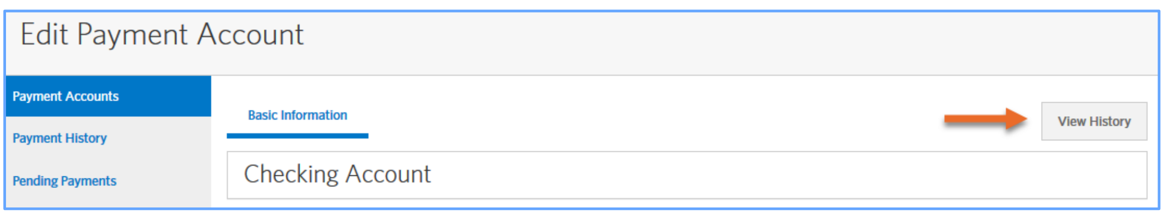
The audit history information includes the login ID of the person to make a change to the account, as well as the date and time of any changes.

Follow the steps below to view account history for a payment account.

1. Select the *Payments* tab in the navigation bar.
2. Click *Options* and select *View/Edit Account* for the account on the *Payment Accounts* page. The *Edit Payment Account* page displays. (See Editing a Payment Account for additional information.)



3. Click *View History*. The *Account History* window displays.



If applicable, click *Advanced Search* to search for a specific transaction. Click *Reset Search* to remove the search criteria.

Account History

Advanced Search | Reset Search

	Action	Change	Change Date	Change By
View	Update	No Change	08/30/2019 10:51:54 AM EDT	CARRIE4321
View	Add	New Account	08/30/2019 10:45:49 AM EDT	CARRIE4321

4. Click *View* for a transaction to view the details.

   The *Account History details* display. A green checkmark indicates items that were updated for the transaction.

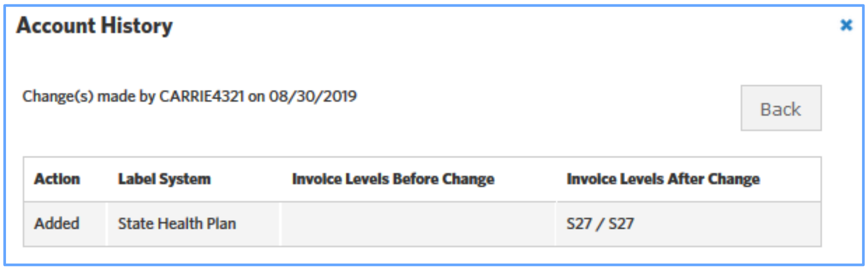
Account History

Change(s) made by CARRIE4321 on 08/30/2019

Back

Updated	Change	Old Value	New Value
	Account Name		Checking Account
	Bank Name		Any Bank
	City		Anytown
	State		NC
	Country		USA
	Account Type		Checking
	Account Holder		Sample Company
	Routing Number		*****8079
	Account Number		*****1111
	Default Account		Yes
	Account Enablement		Yes
	Grant this account access to all invoice levels		Yes
	Auto-Draft Authorization		Yes
	Auto-Draft Effective Date		08/30/2019
	Only I can view/edit/use this account for payment		No

5. Click *view changes resulting from this update* at the end of the table to see details about any invoice level restriction changes associated with the transaction.



6. Click *Back* to return to the previous window.

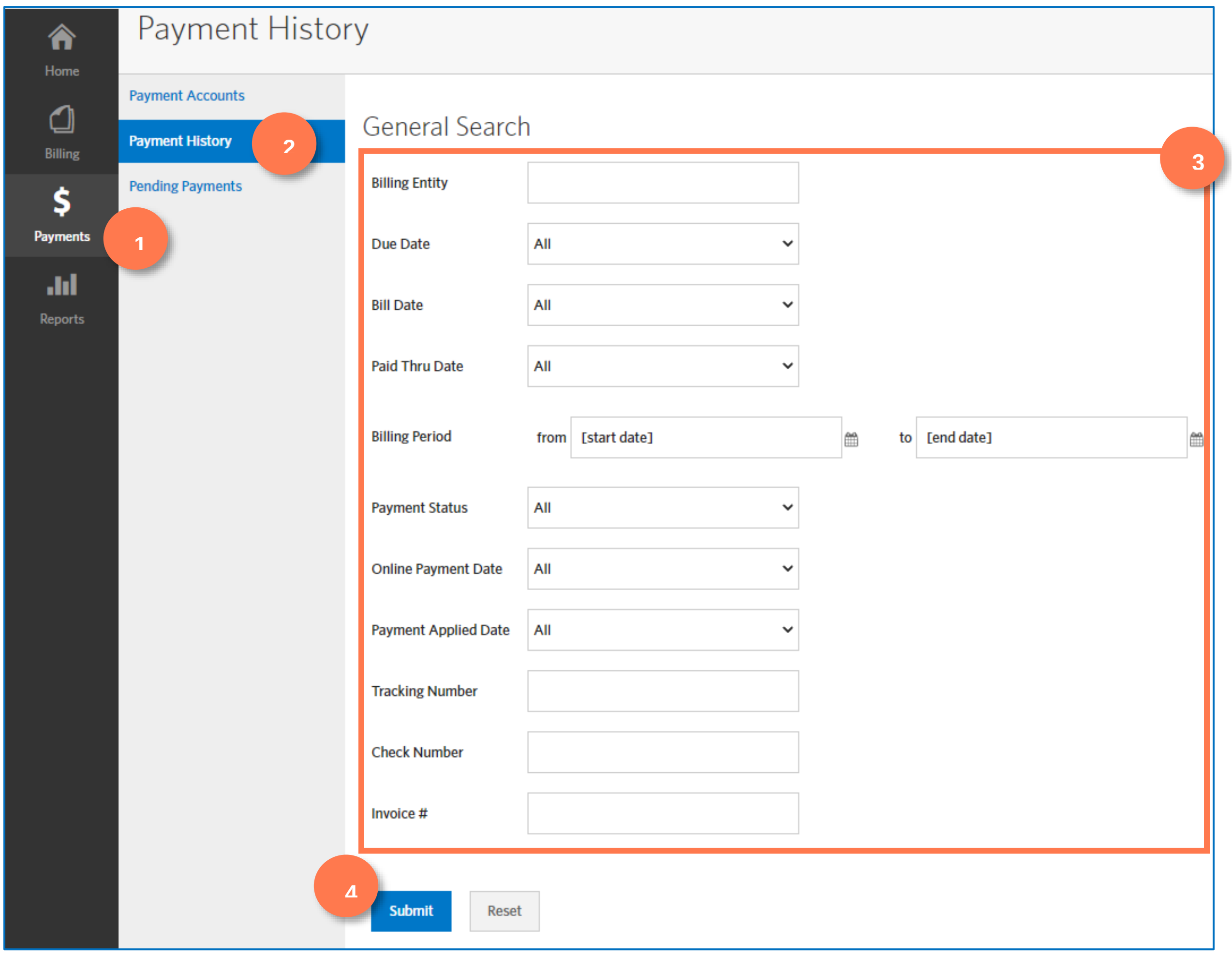
Viewing Payment History

Search for and view payment history to review specific information about payments made to invoices.

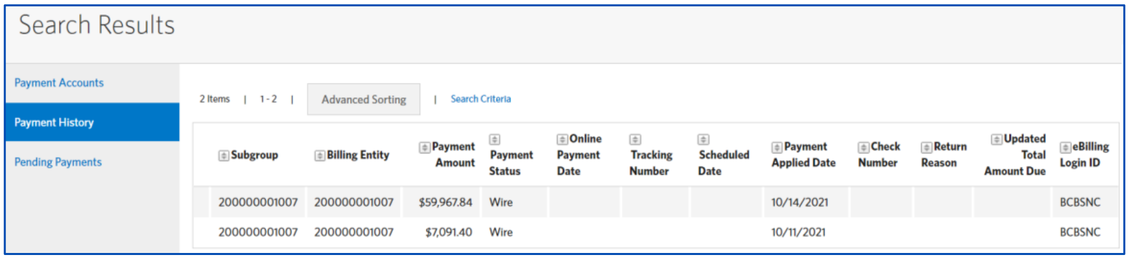
A received payment is only tied to an invoice in Billing & Payments (eBilling) if the payment was submitted electronically.

Follow the steps below to view payment history.

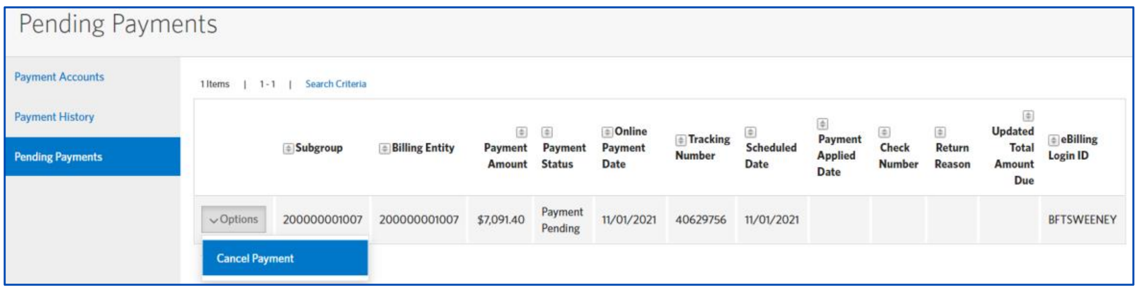
1. Select the *Payments* tab on the navigation bar.
2. Select the *Payment History* tab on the secondary navigation bar. The *General Search* page for payments displays.
3. Enter the search criteria.
4. Click *Submit* to display the search results.



If necessary, you can use the *Advanced Sorting* feature to sort the data using multiple columns. See [Advanced Sorting](#) for additional information.



If a payment has a status of *Scheduled*, meaning the payment has not been processed yet, you may click *Options* and select *Cancel Payment*, if needed. Remember to schedule a new payment if necessary to avoid a lapse in coverage.



You can view a list of all scheduled payments by clicking the *Pending Payments* subtab under the *Payments* tab.

Chapter 4 Reports

You can generate invoice and payment reports on the *Reports* tab. The *Reports* tab includes three sub tabs:

- The *Create Reports* tab displays all available reports. Selecting *Create* for a report will present filter criteria and format options for the report. You can create a one-time report or schedule reports to run at specific time intervals.
- The *Completed Reports* tab displays all the reports generated within a specified number of days as established for your company. (The number of days is indicated below the list of available reports.)
- The *Scheduled Reports* tab displays all reports scheduled to run on a specific start and end date. You can edit or delete reports from the schedule as necessary.

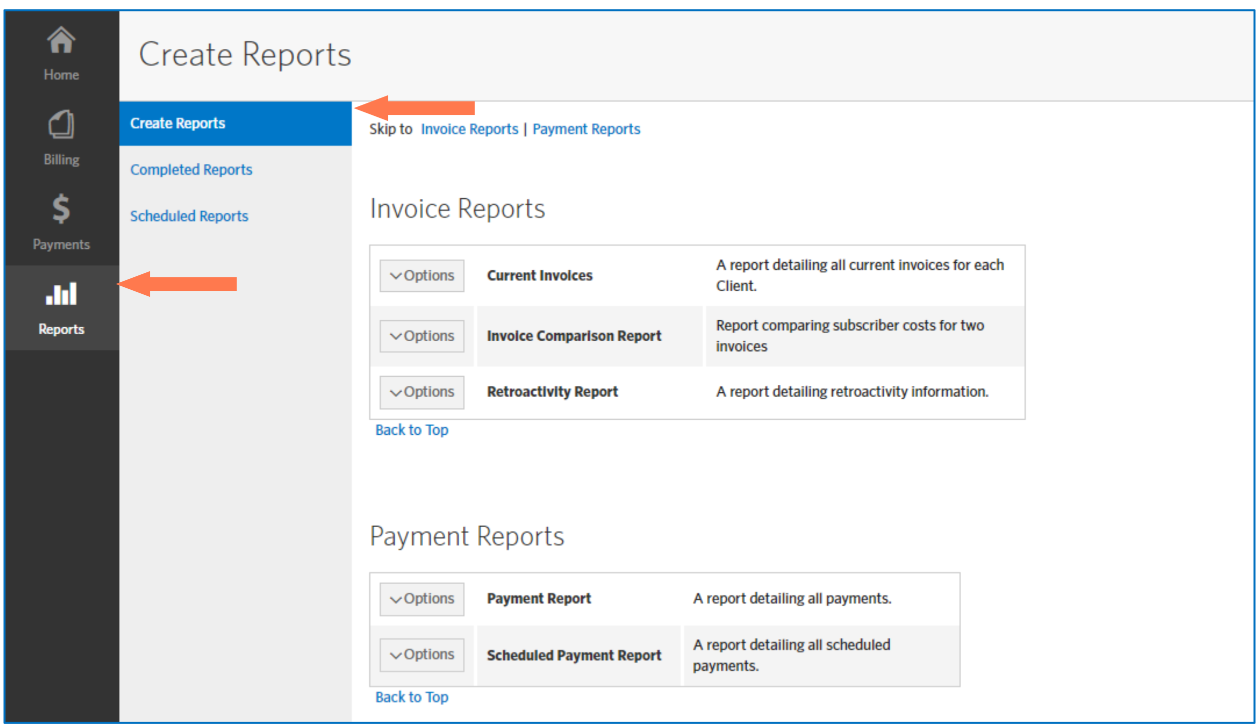
Managing Reports

You can create and schedule invoice and payment reports on the *Create Reports* tab.

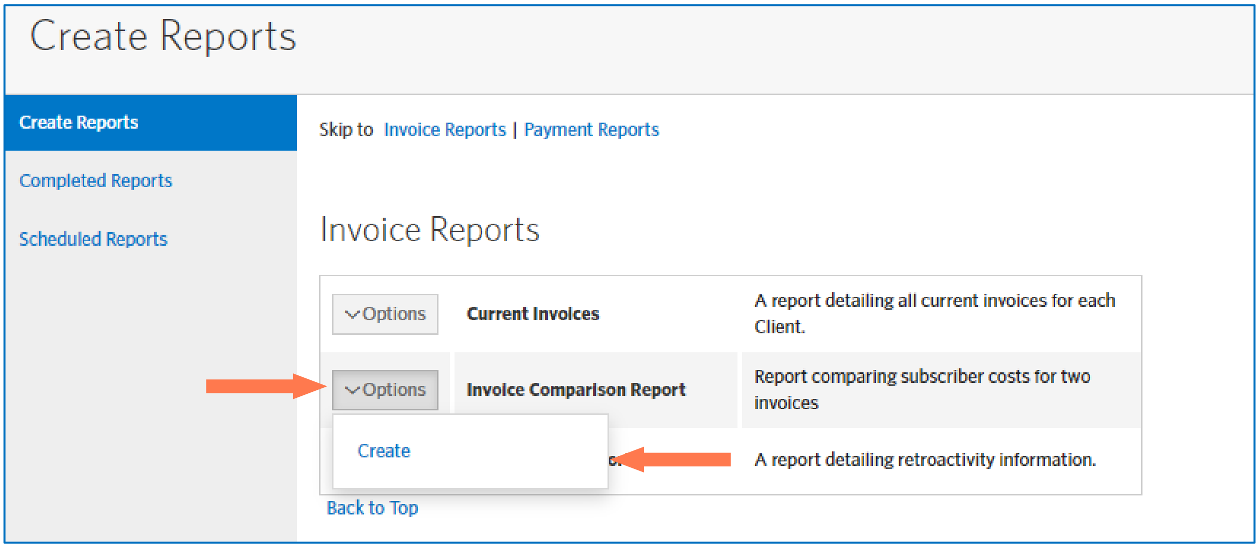
Creating a Report

Follow the steps below to create a report.

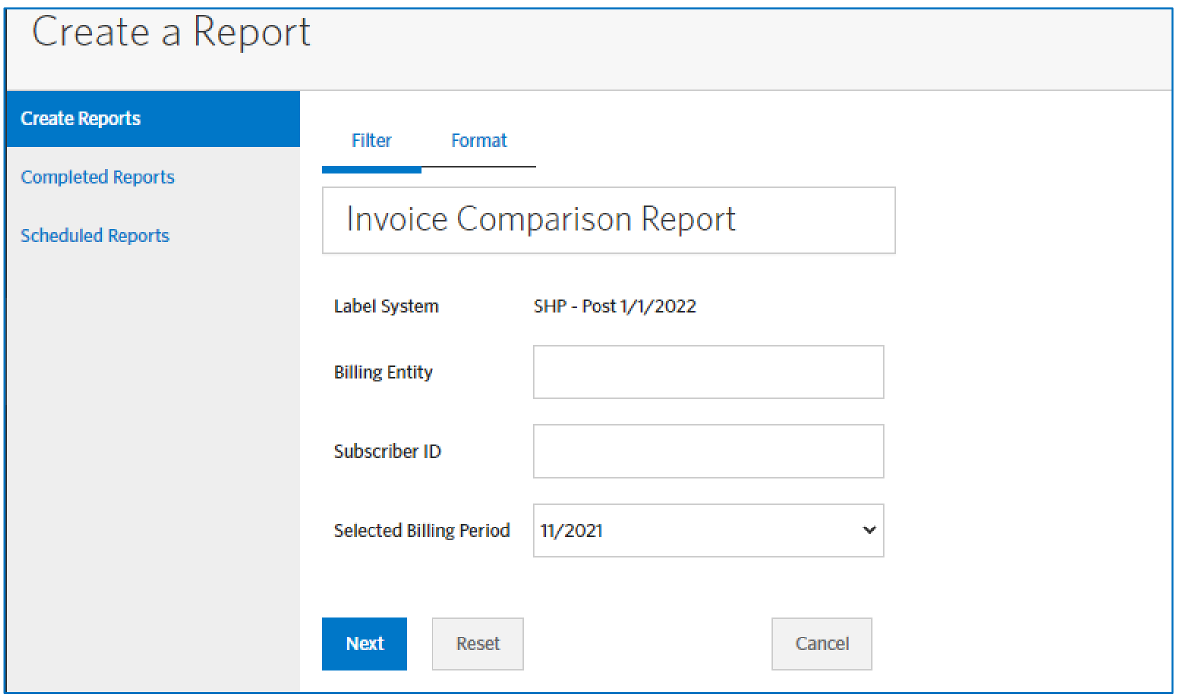
1. Select the *Reports* tab in the navigation bar. The *Create Reports* page displays. Reports are categorized as *Invoice Reports* or *Payment Reports*.



2. Click *Options* and select *Create* for the report to be generated.



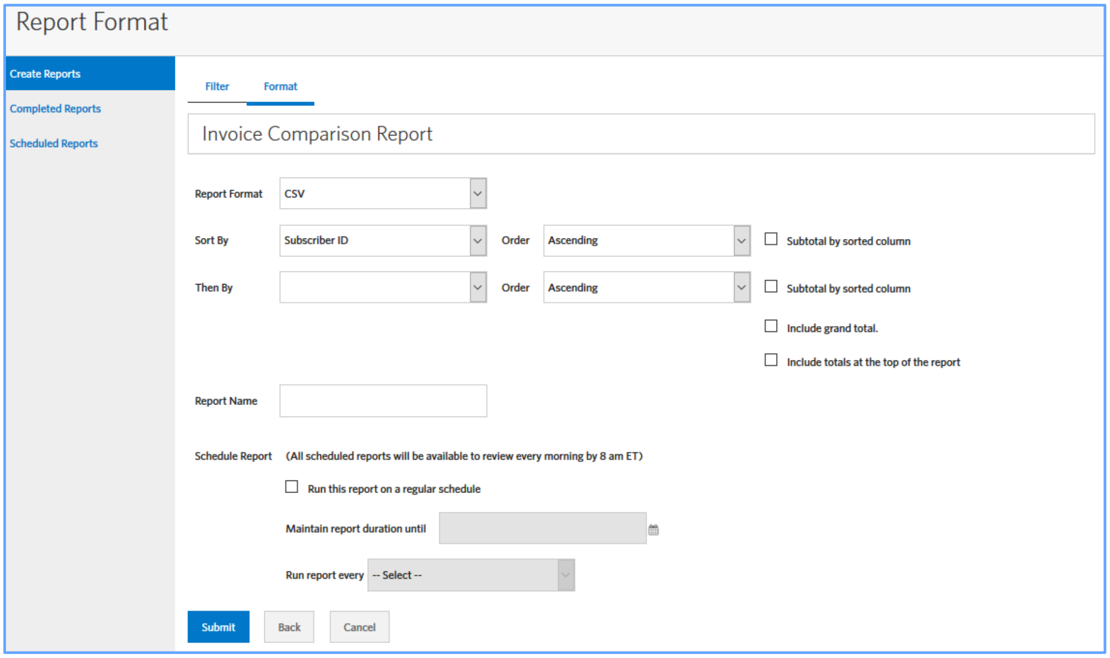
3. Enter the report parameters and click *Next*. Available filters and parameters will vary by report.



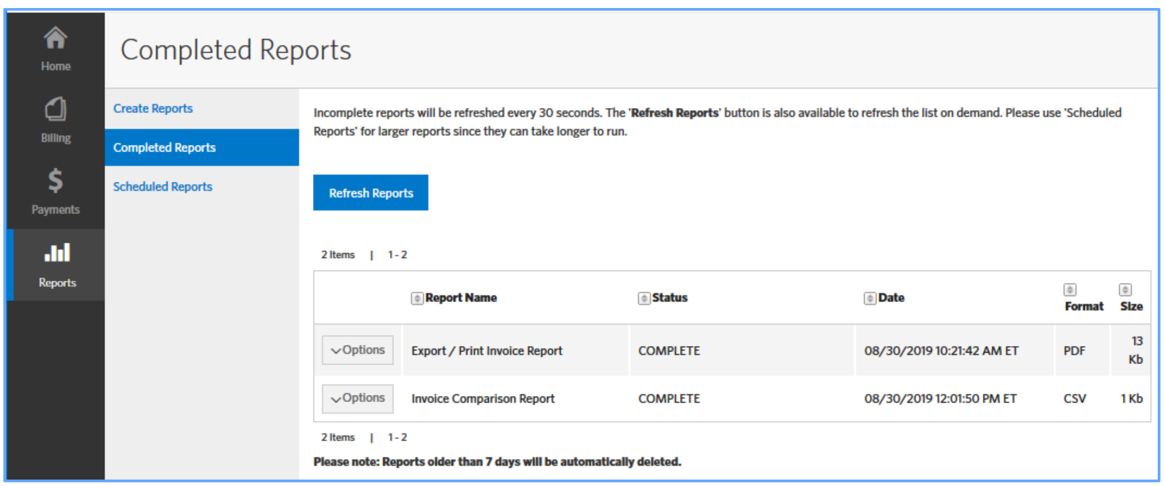
4. Enter or select the formatting options, including the *Report Format* (CSV, PDF or HTML) and the sorting options.

   Because this scenario describes the on-demand report generation process, do not select the *Run this report on a regular schedule* checkbox. See Scheduling Reports for additional information.

5. Click *Submit*.

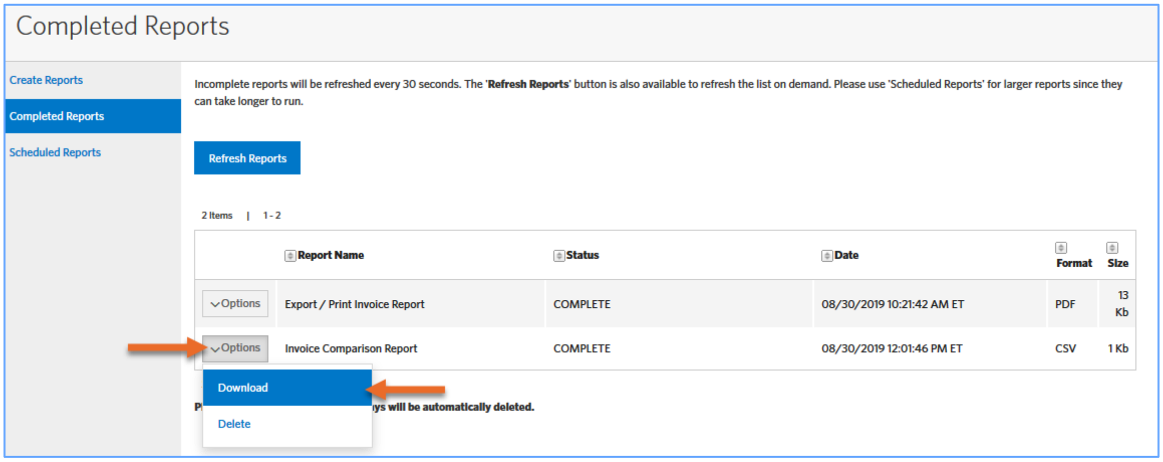


The *Completed Reports* page displays. The report *Status* will display as *PENDING* or *RUNNING* while generating the results. Depending on the size and complexity of the report, it may take a few minutes to generate the results. You can click *Refresh Reports* to refresh the page and display the current status. When the report is complete the *Status* will display as *COMPLETE*.



The *Completed Reports* page refreshes automatically every 30 seconds.

6. Click *Options* and select *Download* to download a copy of the report.



The report output downloads and displays.

The generated report will be automatically deleted after seven days.

Scheduling a Report

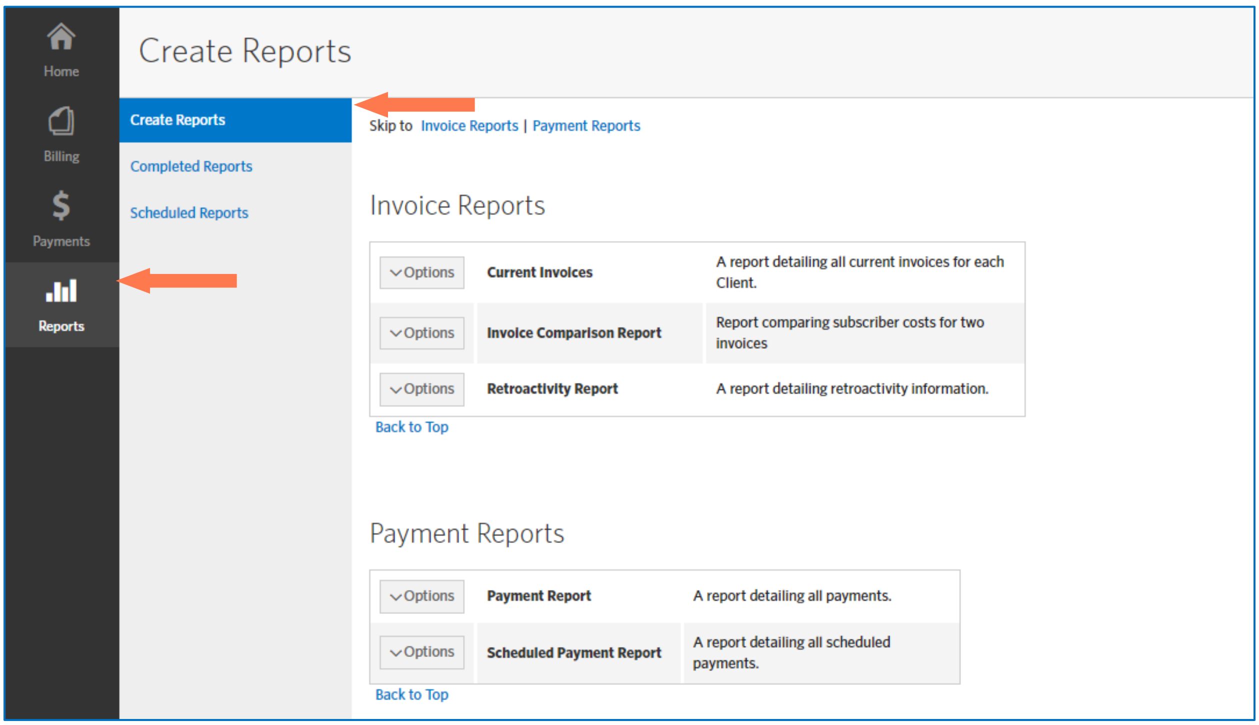
In addition to creating on-demand reports, you can also schedule reports to run at a regular interval, for example, once a week or once a month. You can create a schedule for any of the reports available to you.

If another scheduled report runs during the specified time period for a scheduled report, Billing & Payments (eBilling) creates another instance of the report rather than replacing the previously-generated report.

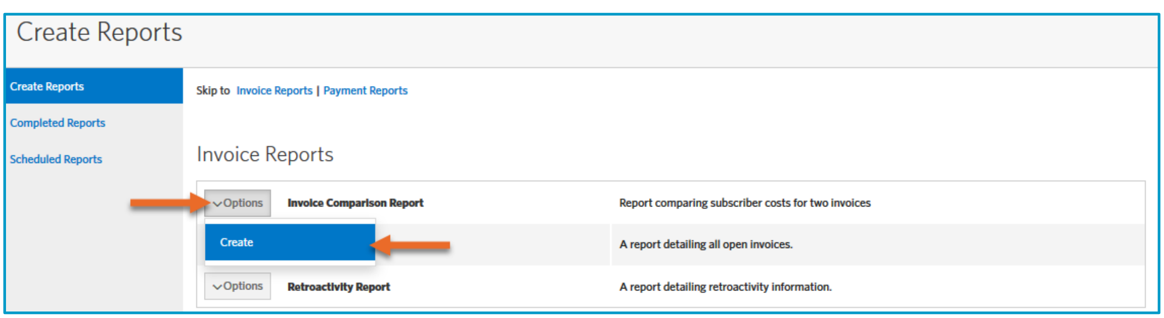
The process for scheduling a report is almost identical to the process of creating an on-demand report, but a scheduled report includes some additional parameters. See [Creating a Report]() for additional information.

Complete the following steps to schedule a report.

1. Select the *Reports* tab in the main navigation bar, then select *Create Reports* in the secondary navigation, if necessary.

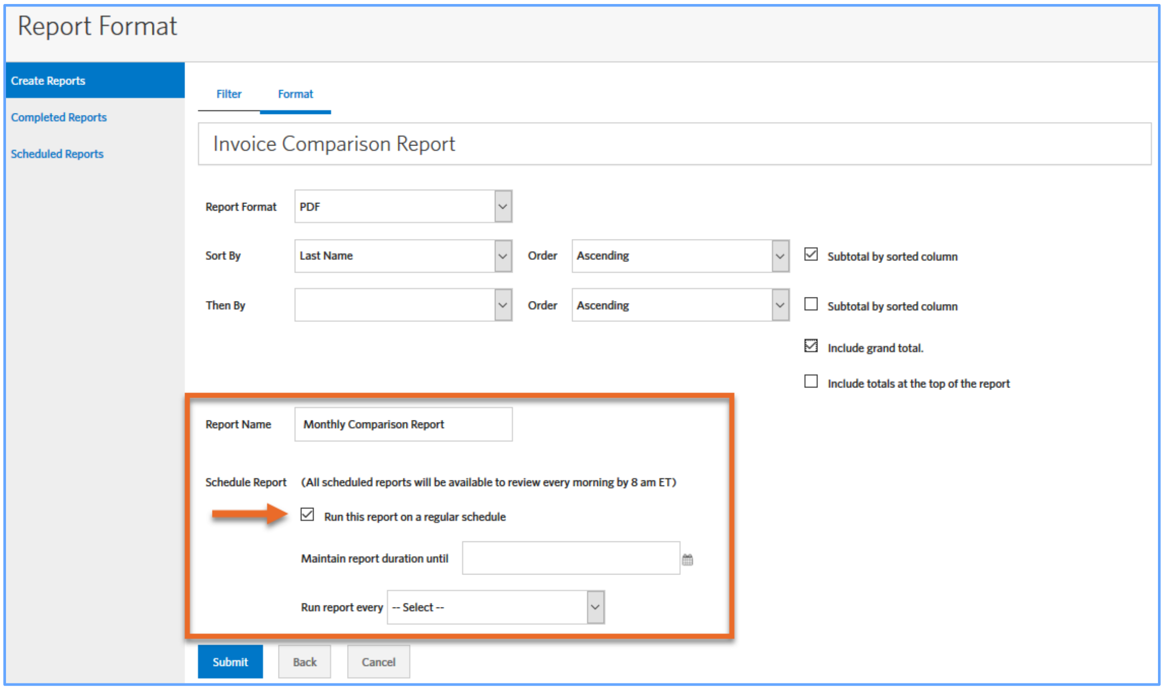


2. Click *Options* and then select *Create*.



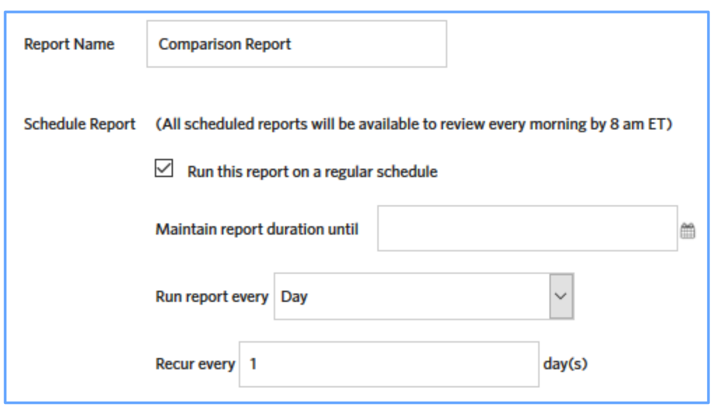
3. Select the filtering options for your report and click *Next*. Available options will vary by report.
4. Select formatting and sorting options for your report.

5. Select the *Run this report on a regular schedule* checkbox on the *Report Format* page.

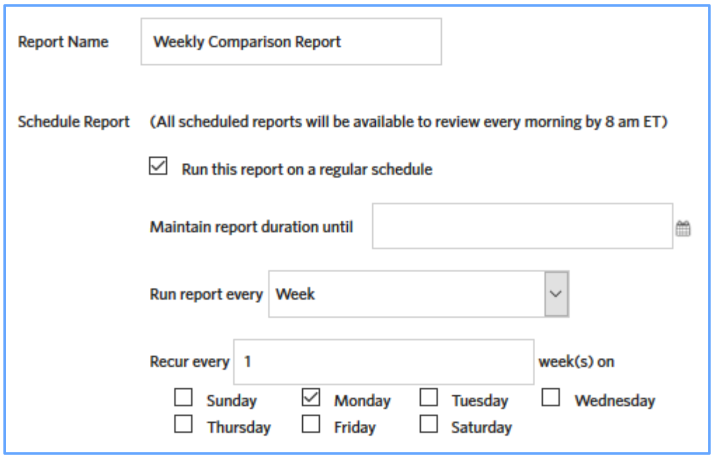


6. Enter the scheduling parameters to indicate how frequently you would like to run the report.

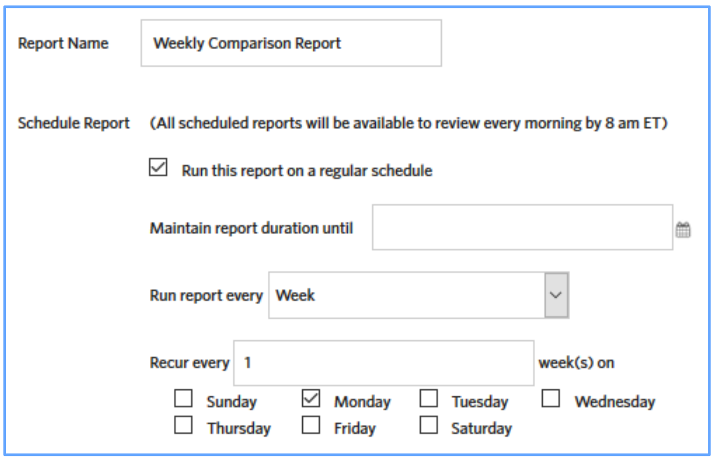
- You must enter a *Report Name* when setting up a report schedule.
- If *Day* is the selected frequency, you can specify how frequently you want the report to recur in days.



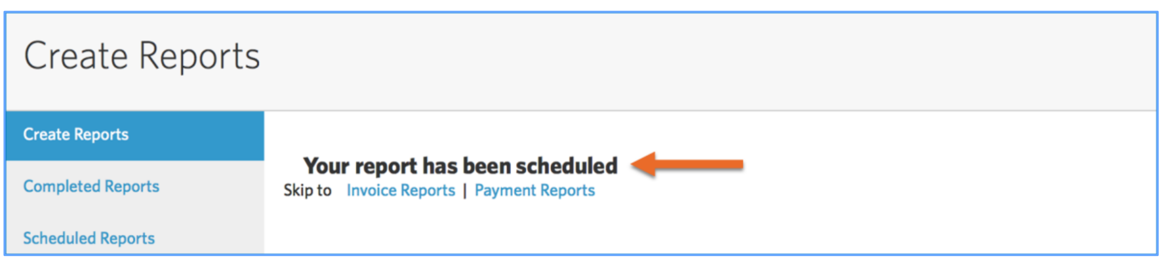
- When scheduling the report weekly, you can specify which days of the week the report generates.



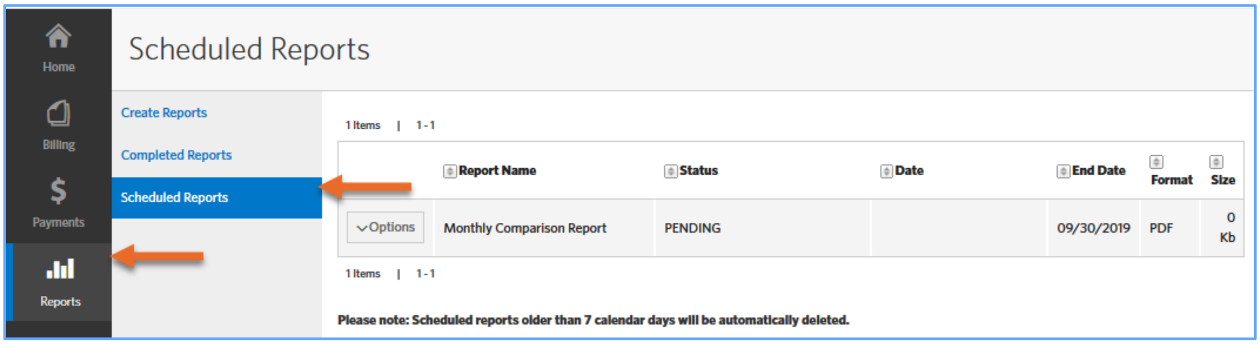
- When scheduling the report monthly, you can specify which day of the month the report generates.



7. Click *Submit*. The *Create Reports* page displays a confirmation.

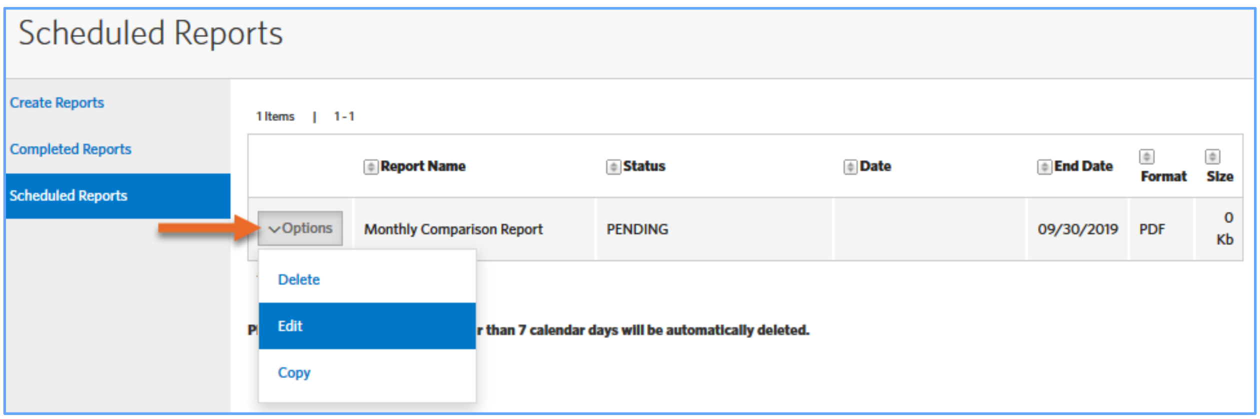


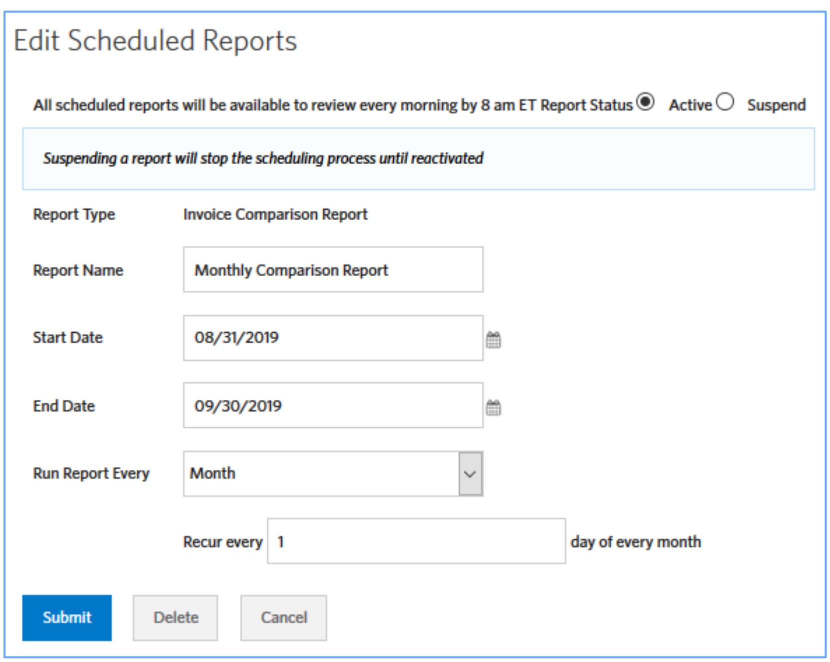
To view scheduled reports, select the *Scheduled Reports* tab in the secondary navigation of the *Reports* tab.



The scheduled report displays a *Status* of *Pending* until the report generates. The status will then update to *Complete*. After viewing a report, the status updates to *Viewed*.

Click the *Options* menu and select *Edit* if you would like to update the report schedule or temporarily suspend the report schedule. You may instead click the *Options* menu and select *Delete* if the report is no longer needed.



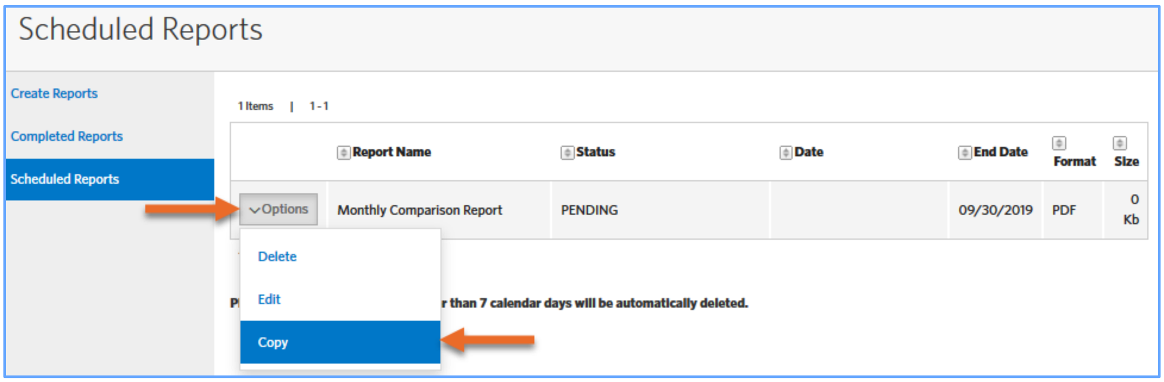


Sharing a Scheduled Report

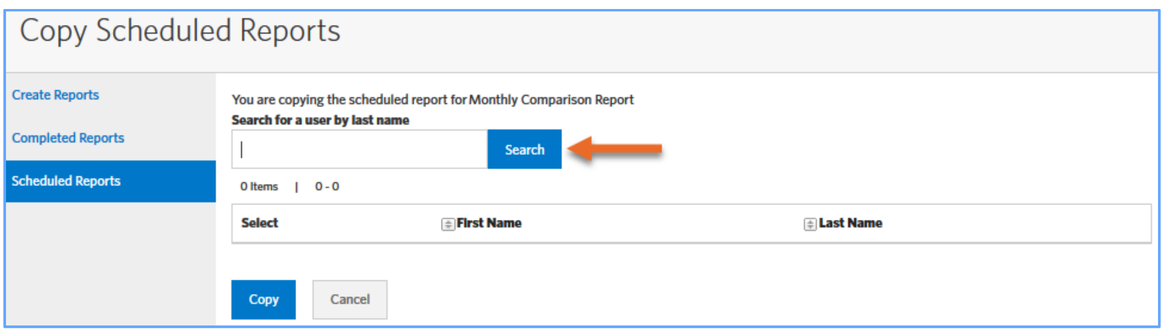
You can copy recurring report criteria to other users. Reports can only be copied to users who have rights to the specific report being shared and users who have rights to the groups on the report. Once the report criteria has been shared, the user who receives the criteria will see the shared information under their *Scheduled Reports* tab.

Follow the steps below to share a report schedule with another user.

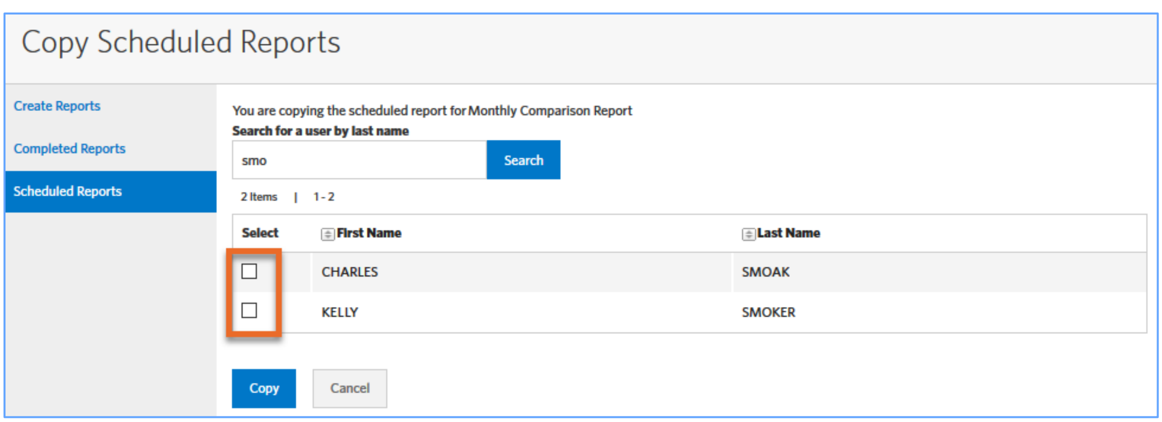
1. Create a *Scheduled Report*. See the Scheduling a Report section for more information.
2. Select *Copy* from the *Options* drop-down menu for the report you want to share on the *Scheduled Reports* tab.



3. Enter the last name of the user with whom you are sharing the report, then click *Search*.



4. Select the user(s) from the list.



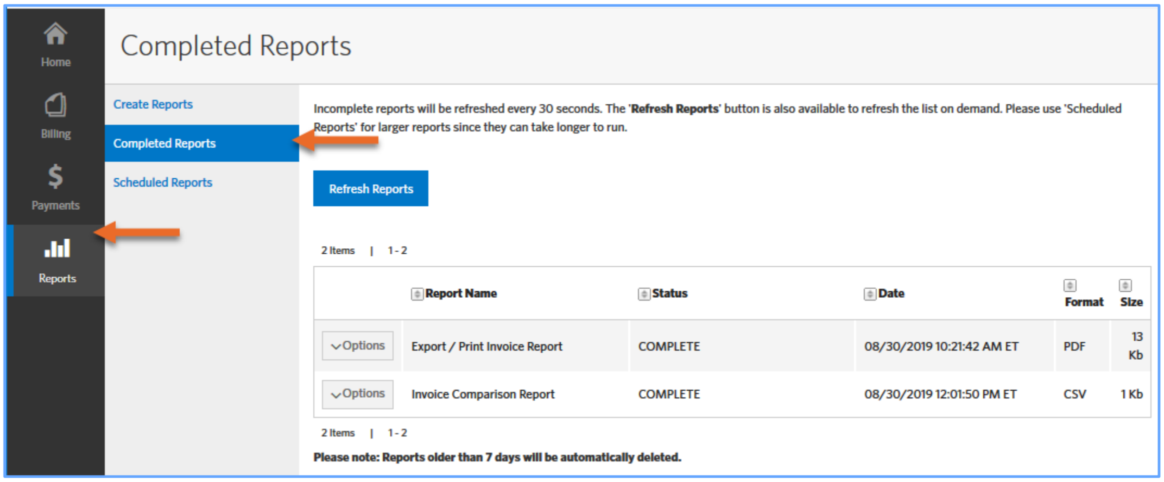
5. Click *Copy*.

Viewing Reports

You can download and view reports for up to a specified number of days as determined for your company after the report is generated. Reports are automatically deleted after the specified number of days. The number of days is indicated below the table on the *Completed Reports* and *Scheduled Reports* tab.

To view reports, complete the following steps.

1. Select the *Reports* tab in the main navigation bar.
2. Select the *Completed Reports* tab in the secondary navigation bar.



3. View the status of your reports.
4. Click *Options*, then select *Download* for any report whose status is *Complete.*