

May

2023 Release Notes



General Changes

Announcement View/Edit Permissions

[F22502] Permissions have been enforced for viewing and editing announcements that allow Admin Portal Uses to view/edit all announcements. Employer Portal Users will only be able to view/edit announcements that they created.

Employer Portal

Enrollment Plan Category Configuration

[F20356] Clients will now be able to configure the Plan Category names that appear during the 'Coverage' section of the enrollment process. Please contact Help Desk with any questions utilizing this feature.

The screenshot shows the 'Add Coverage' workflow in the Employer Portal. At the top, a navigation bar includes 'Member Information', 'Add Dependents', 'Add Coverage', 'Other Insurance', and 'Confirmation'. The 'Add Coverage' step is active. Below the navigation, a dark bar displays 'MEDICAL' with a medical icon, which is highlighted by a yellow box. Underneath, there is a 'Select a Plan' section with a note: 'The Effective Date will depend on the waiting period rules outlined by your Benefit Plan.' To the right of this section is a 'WAIVE MEDICAL COVERAGE' button. A plan card is visible below, showing '(123321) test' for 'Fox Valley Holdings Yogurt'. The plan card has two tabs: 'IN NETWORK' and 'OUT OF NETWORK'.

Member Portal

★ Bills Due/Payment History Export

[F21824] The 'Long Term Care Premium' POD now displays and exports 'Payment History' information along with 'Current Bills Due'.

Current Detail Billing

Current Bills Due

Drag a column header and drop it here to group by that column

Premium Amount	Premium Due Date	Premium Payment Mode	Premium Payment Method	Lapse Date	Contingent/Standard Non-Forfeit...	Billing From	Billing Thru	Status
\$254.44	03/11/2023	Monthly	Cheque			03/11/2023	04/11/2023	due

1 - 1 of 1 items

Payment History

Payment History

Drag a column header and drop it here to group by that column

Premium Amount	Premium Due Date	Premium Payment Mode	Premium Payment Method	Lapse Date	Contingent/Standard Non-Forfeit...	Billing From	Billing Thru	Status
\$254.44	04/11/2023	Monthly	EFT			04/11/2023	05/11/2023	paid
\$254.44	02/11/2023	Monthly	EFT			02/11/2023	03/11/2023	paid
\$254.44	01/11/2023	Monthly	EFT			01/11/2023	02/11/2023	paid
\$254.44	12/11/2022	Monthly	EFT			12/11/2022	01/11/2023	paid
\$254.44	11/11/2022	Monthly	EFT			11/11/2022	12/11/2022	paid
\$254.44	08/11/2022	Monthly	EFT			08/11/2022	09/11/2022	paid
\$215.43	07/11/2022	Monthly	EFT			07/11/2022	08/11/2022	paid
\$215.43	06/11/2022	Monthly	EFT			06/11/2022	07/11/2022	paid

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Claim Number and Claim Status Visibility in Claims POD

[F21936 & F22024] We have added a config to allow Clients to hide the 'Claim Number' and 'Claim Status' columns within the 'Claims' POD.

Claims

Claims

Drag a column header and drop it here to group by that column

Claim ID	Claim Number	Sub. ID	Member Seq.	First Name	Last Name	Claim Type	Claim Status	Payment Status
▶ 0000000921000001		785412996	01	Susan	Snow	Disability	Not Adjudicated	None
▶ 0000000901000001		785412996	01	Susan	Snow	Pharmacy	Not Adjudicated	None
▶ 0000000663000001		785412996	01	Susan	Snow	Institutional	Not Adjudicated	None
▶ 0000000611000001		785412996	01	Susan	Snow	Institutional	Not Adjudicated	None

Loading Indicators

[F22389] We have added loading indicators to the 'Billing Menu/Details' screen to identify when information is being retrieved.

Add ULD Request

[F22399] A new 'Add ULD' (Unintentional Lapse Designee) request has been added to the 'Create a Request' menu on the Member Portal. This will allow Members to add representatives as a ULD. These requests will be visible in the 'Request Center' in the Admin Portal.