

AdminEASE Bill Pay Customer Support Job Aid

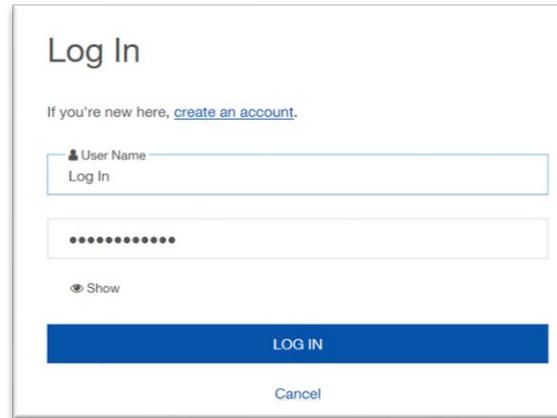
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AdminEASE Self-Administered Online Payments

Log into AdminEASE with your User name and Password.

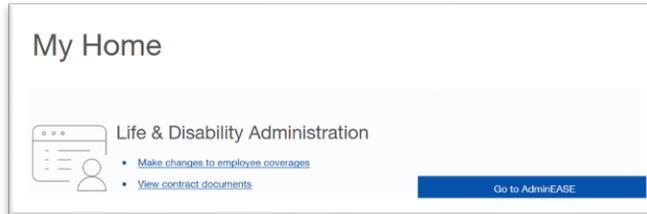
Click 'Log In'



The screenshot shows a 'Log In' form with the following elements:

- Title: Log In
- Text: If you're new here, [create an account](#).
- Input field: User Name (containing 'Log In')
- Input field: Password (represented by dots)
- Link: Show (with an eye icon)
- Button: LOG IN (blue)
- Link: Cancel

Click 'Go to AdminEASE'



The screenshot shows a 'My Home' dashboard with the following elements:

- Title: My Home
- Section: Life & Disability Administration
 - [Make changes to employee coverages](#)
 - [View contract documents](#)
- Button: Go to AdminEASE (blue)

Click 'Self-Administered Billing Statement'



The screenshot shows a dashboard with the following elements:

- Section: WA STATE HCA SEBB Active Policies
 - Policy 756494 (Effective: 01/01/2020)
Long Term Disability Buy Up
 - View more information:
[Active Billing Divisions by Policy](#)
- Section: Manage Employee Coverage
- Section: Manage Billing
 - [Sign Up for Paperless Billing](#)
 - [Billing and Payment Details](#)
 - [Self-Administered Billing Statement](#)

All active billing divisions will appear in the 'Billing Division' dropdown menu. Users select the appropriate Self-Administered division from the 'Billing Divisions' dropdown menu.

The 'Premium Due Date' drop down menu will show all outstanding bills.

Note: The oldest bill must be calculated and paid first. In this example, the customer must pay January 1, 2019 before they can pay the February, March and April bills.

If they attempt to pay the February, March or April bill first they will receive a warning notice.

Once the 'Premium Due Date' is selected you will be routed to the Self-Administered Billing Statement.

Update the lives, volume, premium for coverages with age graded rates, and any adjustments if applicable on the statement.

Click 'Calculate and Save'.

Premium Due Date: January 1, 2022

Benefit Plan	Rate	Per	LIVES	INSURED AMOUNT
LTD50%	VARIABLE		120	275,000
Prior Figures:			120	275,000
Actual Figures This Month:			<input type="text" value="120"/>	<input type="text" value="275,000"/>
Totals and Adjustments:			\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>
			Amount Due	Back Charge
LTD60%	VARIABLE		50	50,000
Prior Figures:			50	50,000
Actual Figures This Month:			<input type="text" value="50"/>	<input type="text" value="50,000"/>
Totals and Adjustments:			\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>
			Amount Due	Back Charge

Reset Print Calculate and Save

If you choose 'Re-calculate and Save', a 'Warning' message will appear letting you know the prior month's values were copied into the template.

Once you have calculated and saved the lives, volume and premium amounts, you have the option to recalculate and save changes to the template if any of the values need to be changed.

Warning

- Actual Lives and Insured Amount for this due date were left blank for LTD50%. Prior Figures have been copied down to Actual Figures This Month.
- Actual Lives and Insured Amount for this due date were left blank for LTD60%. Prior Figures have been copied down to Actual Figures This Month.
- Online BillPay is available for the earliest open bill for a BillPay user and if the last calculation included no errors.

Policyowner: VIA STATE ICA SEBB EVERGREEN PUBLIC SCHOOL DIST 1234 MAIN ST SEATTLE, WA 00000
Remittance Address: STANDARD INSURANCE COMPANY PO BOX 6367 PORTLAND, OR 97208-6367 USA

Premium Due Date: January 1, 2022

Benefit Plan	Rate	Per	LIVES	INSURED AMOUNT	Bill Category
LTD50%	VARIABLE		120	275,000	0100
Prior Figures:			120	275,000	
Actual Figures This Month:			<input type="text" value="120"/>	<input type="text" value="275,000"/>	
Totals and Adjustments:			\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>
			Amount Due	Back Charge	Back Credit
LTD60%	VARIABLE		50	50,000	0100
Prior Figures:			50	50,000	
Actual Figures This Month:			<input type="text" value="50"/>	<input type="text" value="50,000"/>	
Totals and Adjustments:			\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>
			Amount Due	Back Charge	Back Credit

Benefit Premium Totals:
Total Amount Due \$ 0.00
Total Billing Fees \$ 0.00
Amount to be Paid \$ 0.00

Reset Print Calculate and Save Make Payment

Once you are satisfied the data is correct, select 'Make Payment'.

Note: You can select the Print button, print the template and send it in with a paper check if you chose not to pay online.

Premium Due Date: January 1, 2022

Benefit Plan	Rate	Per	LIVES	INSURED AMOUNT	Bill Category
LTD50%	VARIABLE		120	275,000	0100
Prior Figures:			120	275,000	
Actual Figures This Month:			<input type="text" value="120"/>	<input type="text" value="275,000"/>	
Totals and Adjustments:			\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>
			Amount Due	Back Charge	Back Credit
LTD60%	VARIABLE		50	50,000	0100
Prior Figures:			50	50,000	
Actual Figures This Month:			<input type="text" value="50"/>	<input type="text" value="50,000"/>	
Totals and Adjustments:			\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>	\$ <input type="text" value="0.00"/>
			Amount Due	Back Charge	Back Credit

Benefit Premium Totals:
Total Amount Due \$ 0.00
Total Billing Fees \$ 0.00
Amount to be Paid \$ 0.00

Reset Print Calculate and Save Make Payment

Make Payment: Takes the customer to the US Bank site to pay their bill.

When selecting 'Make Payment' a new browser tab will open and navigate from AdminEASE to the US Bank site.

The 'Payment Amount' cannot be altered for a Self-Administered bill.

Select 'Pay Now' or 'Pay on a future date' and add the date you want the bill to be paid.

Select the payment account in the 'Saved Payment Methods' drop down menu.

Select 'Continue'.

Make a Payment

My Payment

Self-Admin One Time

Amount Due \$128,000.00
Due Date 01/01/2020
Name WA STATE HCA SEBB SEATTLE SCHOOL DISTRICT
Policy Number 756494
Billing Division 0001
Login Name John Doe
Login ID JD756494
Bill Due Date 20200101
Bill Sequence Number 002
Bill Trans ID SI75649400012020010100220190703161127

Payment Information

Frequency One Time
Payment Amount \$128,000.00
Payment Date Pay Now
 Pay on a future date

Payment Method

Sample Check
123 Main St.
Anytown, MO 12345
DATE: _____
1215
PAY TO THE ORDER OF _____

Personal Check | [Business Check](#)

Bank Routing Number
Bank Account Number
Bank Account Type Checking Savings
 This is a business account
 Save this payment account for future use
Email Address
 Save this email address to My Profile

Continue [Cancel](#)

A review page will populate.

Click 'I accept the Terms and Conditions' box.

Click 'Confirm'.

The 'Confirmation' page will populate and an email confirmation will be sent for your records.

Click 'Exit'.

Repeat the steps above to pay the next outstanding bill if you are paying for multiple due dates at one time.

End of process.

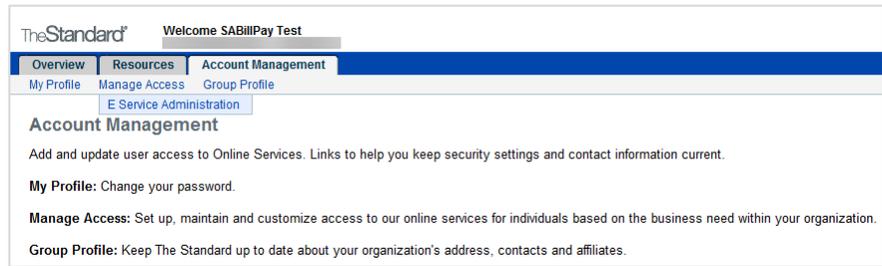
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Customer Account Management – Managing Access

To add, modify, deactivate a user profile or run user profile reports, click the 'Account Management' tab.

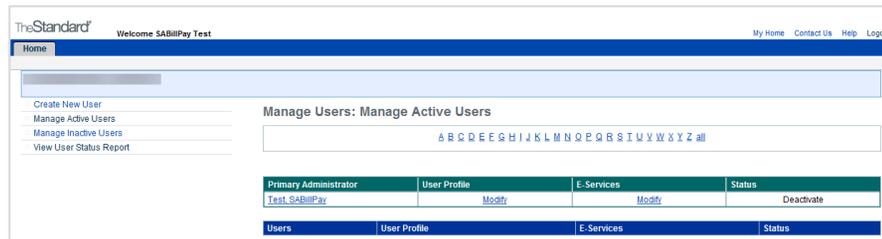


Click 'Manage Access', 'E Service Administration'.



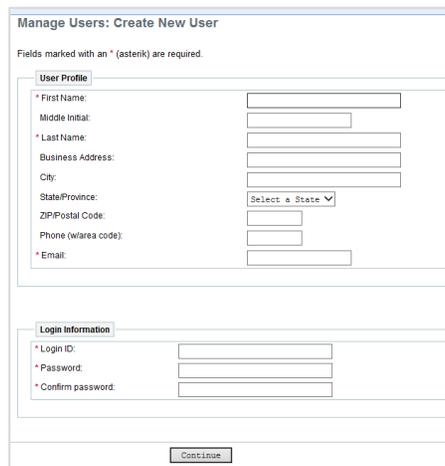
Create a New User Profile

To create a new user profile, click 'Create New User'.



At minimum, populate the required fields on the form.

Click 'Continue'.

The screenshot shows the 'Manage Users: Create New User' form. It includes a note: 'Fields marked with an * (astisk) are required.' The form is divided into two sections: 'User Profile' and 'Login Information'. The 'User Profile' section contains fields for: '* First Name', 'Middle Initial', '* Last Name', 'Business Address', 'City', 'State/Province' (with a 'Select a State' dropdown), 'ZIP/Postal Code', 'Phone (w/area code)', and '* Email'. The 'Login Information' section contains fields for: '* Login ID', '* Password', and '* Confirm password'. A 'Continue' button is located at the bottom of the form.

Review the information in the 'Confirm Create New User' Profile screen.

Select Cancel, Modify or Submit.

End of process.

Note: For Self-Administered bills, the user MUST be granted access to the EBA/SATemplate feature if you are giving them access to BillPay.

See example to the right.

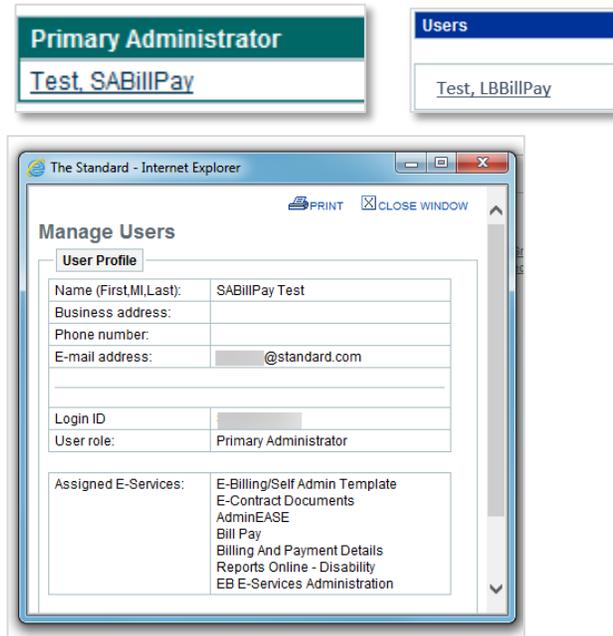
Modify User Profiles

To modify the Primary Administrator profile or manage active users, click 'Manage Active Users'.

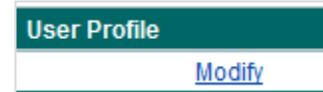
The Primary Administrator and all active users will populate.

To view the 'Primary Administrator' or a 'User' profile, click on the link in the corresponding box.

The Manage Users window will open. *This is informational only and cannot be edited.*

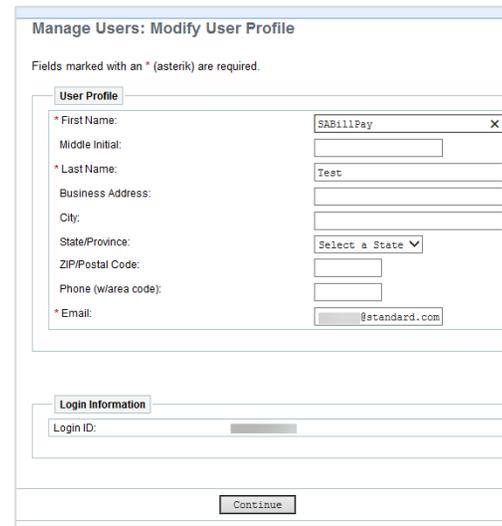


To modify a user profile, click the 'Modify' link in the 'User Profile' box.



At minimum, populate the required fields on the form.

Click 'Continue'.



Review the information in the 'Confirm Modify User Profile' screen.

Select Cancel, Modify or Submit.

End of process.

Manage Users: Confirm Modify User Profile
Please verify the information below. Select **Submit** to save these changes. Select **Modify** to make further changes to this user record. Select **Cancel** to cancel this transaction and return to the list of users.

User Profile

Name (First,MI,Last):	SABillPay Test
Business Address:	
Phone:	
E-mail:	kgraves@standard.com
Login ID:	SABR642521

Modify User E-Services Profile

To modify a user e-services profile, click the 'Modify' link in the E-Services box.

Check or un-check the e-services the user may access.

Click 'Continue'.



Manage Users: Administer User E-Services
SABillPay Test

The following services are available to your organization. Please select the e-services that this user may access.

- AdminEASE (required)
- Bill Pay
 - 645407
 - 0001
 - 0002
 - 648424
 - 0001
- Billing And Payment Details
 - 645407
 - 0001
 - 0002
 - 648424
 - 0001
- E-Billing/Self Admin Template
 - 645407
 - 0001
 - 0002
 - 648424
 - 0001
- E-Contract Documents
- Reports Online - Disability
 - ATEST 2 - LIFE
 - InMat
 - TEST 1
 - InMat name

E-Services Administration
Does this employee have the authority to administer other employees' access to e-services? No Yes

Review the information in the 'Confirm Administer User E-Services' screen.

Select Cancel, Modify or Submit.

End of process.

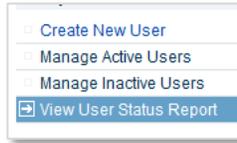
Manage Users: Confirm Administer User E-Services
SABillPay Test

Please verify the information below. Select **Submit** to save these changes. Select **Modify** to make further changes to this user's e-services profile. Select **Cancel** to cancel this transaction and return to the list of users.

- AdminEASE (required)
- Bill Pay
642521
- Billing And Payment Details
642521
- E-Billing/Self Admin Template
642521
- E-Contract Documents
- E-Services Administration

View User Status Report

Click 'View User Status Report'.

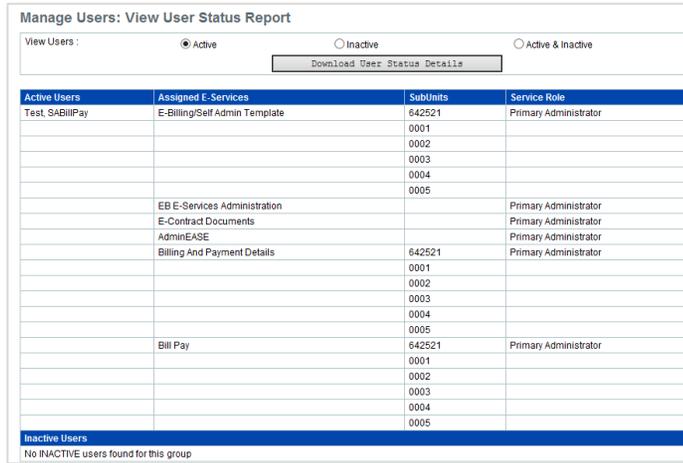


Select 'Active', 'Inactive' or 'Active & Inactive' to select the report type.

Click 'Download User Status Details' button.

The report will download into an Excel spreadsheet.

End of process.



The screenshot shows the 'Manage Users: View User Status Report' interface. At the top, there are radio buttons for 'Active' (selected), 'Inactive', and 'Active & Inactive'. Below these is a 'Download User Status Details' button. The main content is a table with the following columns: 'Active Users', 'Assigned E-Services', 'SubUnits', and 'Service Role'. The table contains data for 'Test, SABillPay' and 'Bill Pay' users, each with five subunits (0001-0005) and a 'Primary Administrator' role. At the bottom, there is a section for 'Inactive Users' with the message 'No INACTIVE users found for this group'.

Active Users	Assigned E-Services	SubUnits	Service Role
Test, SABillPay	E-Billing/Self Admin Template	642521	Primary Administrator
		0001	
		0002	
		0003	
		0004	
		0005	
	EB E-Services Administration		Primary Administrator
	E-Contract Documents		Primary Administrator
	AdminEASE		Primary Administrator
	Billing And Payment Details	642521	Primary Administrator
		0001	
		0002	
		0003	
		0004	
		0005	
	Bill Pay	642521	Primary Administrator
		0001	
		0002	
		0003	
		0004	
		0005	

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