Solstice Marketplace Benefits Administrator Portal Guide

August 2019

Contents

Introduction

Open enrollment is finally finished but your job as a benefits administrator is not over. Things are constantly changing in your organization and in the lives of your employees. Maybe a new hire joins your company or another employee leaves to pursue another other opportunity. When it comes to benefits, you have tasks you must perform all year long.

Luckily the Solstice Marketplace is an easy-to-use platform that was built with you in mind. We know you have lots to do and little time to get it done. So, we built the Solstice Marketplace to make your life easier.

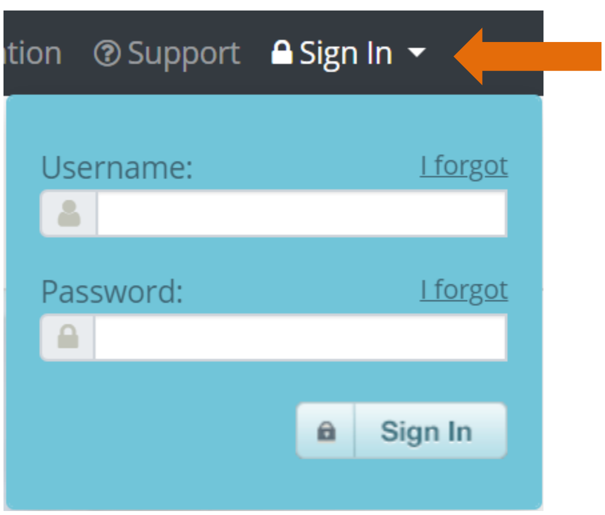
This benefits administrator portal guide contains easy to use instructions that will help you quickly perform the tasks you do most often long after open enrollment has ended.

Once you have selected Solstice as your benefits carrier, you will automatically be registered with the Solstice Marketplace benefits portal. You will receive a **Welcome Email** from us with some important information, including a username and temporary password. Once you have this, navigate to the benefits portal website and sign in to activate your account.

Activate Your Account

1.Enter the following URL address into your browser: https://www.solsticemarketplace.com. It will direct you to your portal.

2. Click **Sign In** and fill in the credentials provided in your Welcome Email:



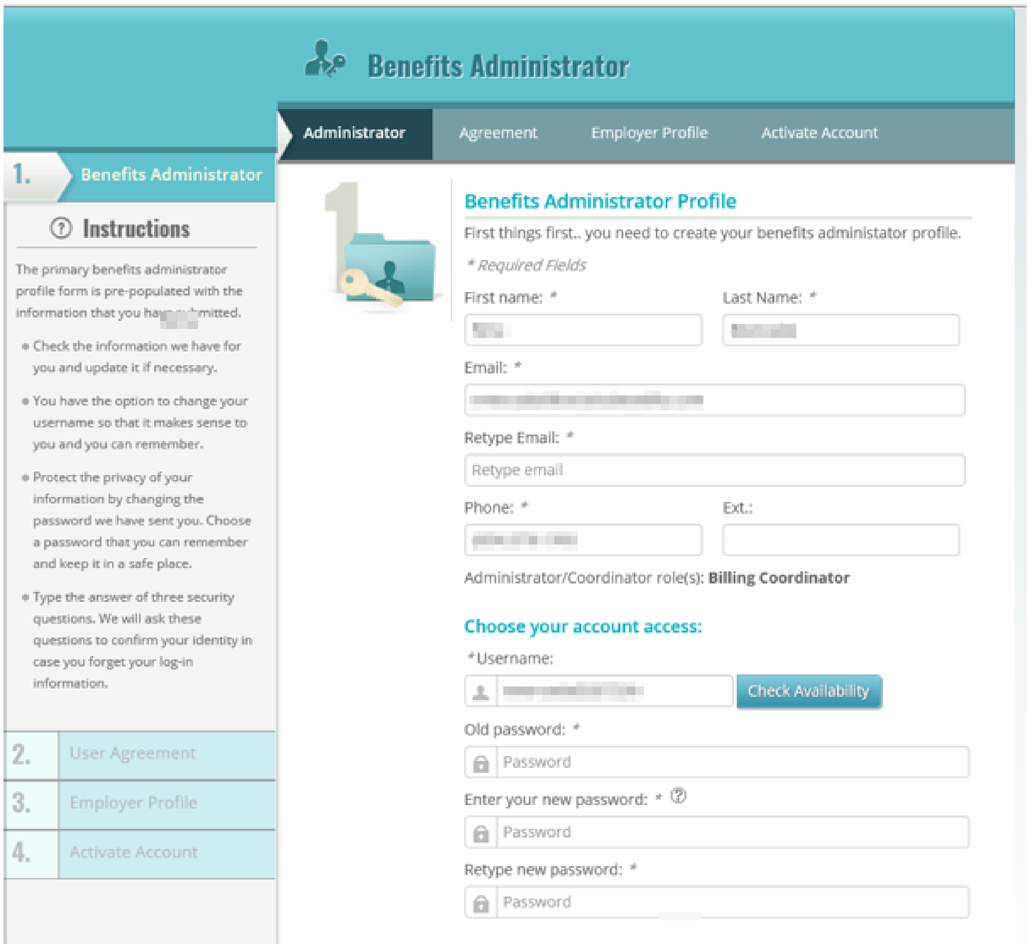
Once you log in, you will be taken to the **Benefits Administrator** page.

3. Confirm the pre-populated information we have for you and fill in any missing information. Completing this page is the first step to updating your profile and activating your account.

To update your profile, follow these steps:

a. In the top third of this page, confirm the contact information we have for you.

b. Navigate to the **Choose your account access** section of this page, which allows you to change your username and create a password that will be meaningful to you. *Please note that this is your only opportunity to adjust this.*

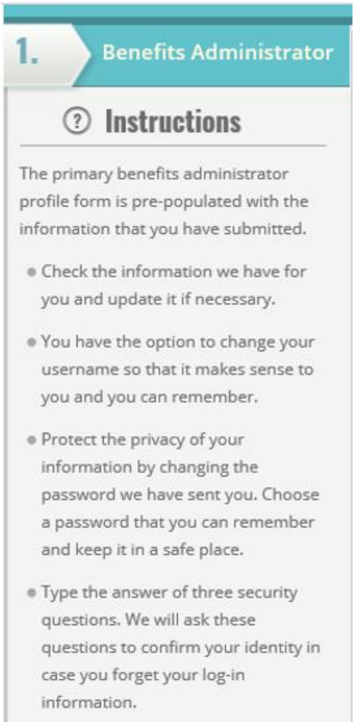


Please note:

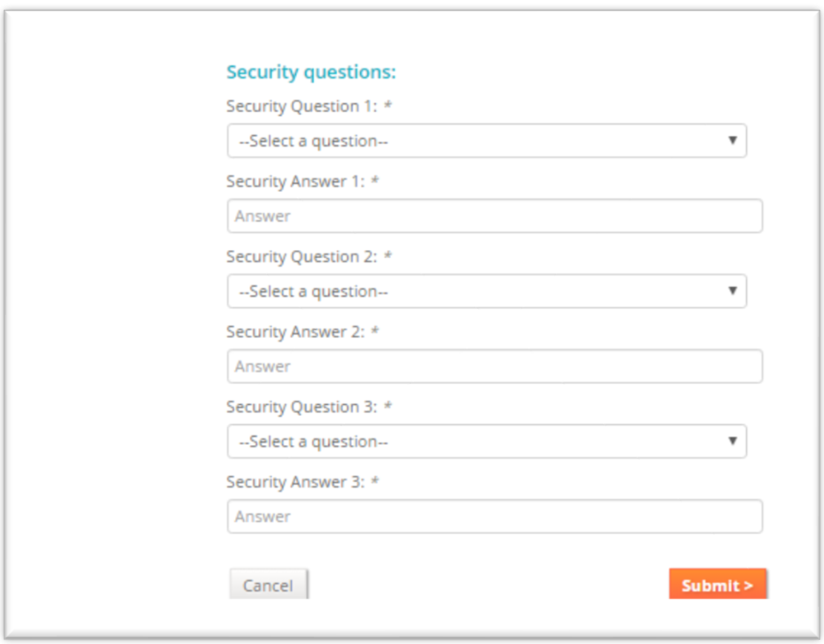
- Your **Old password** is the one you received in your Welcome Email.
- For your **New Password**, be sure to keep the following password requirements in mind.

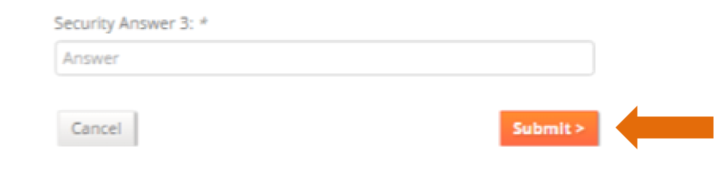
Password must contain:
1. At least six characters
2. At least one uppercase letter
3. At least one lowercase letter
4. At least one number
5. At least one symbol from the following list:
@#$%^&+=!

- Use the instructions located on the left panel of your screen to help as you set up your profile.

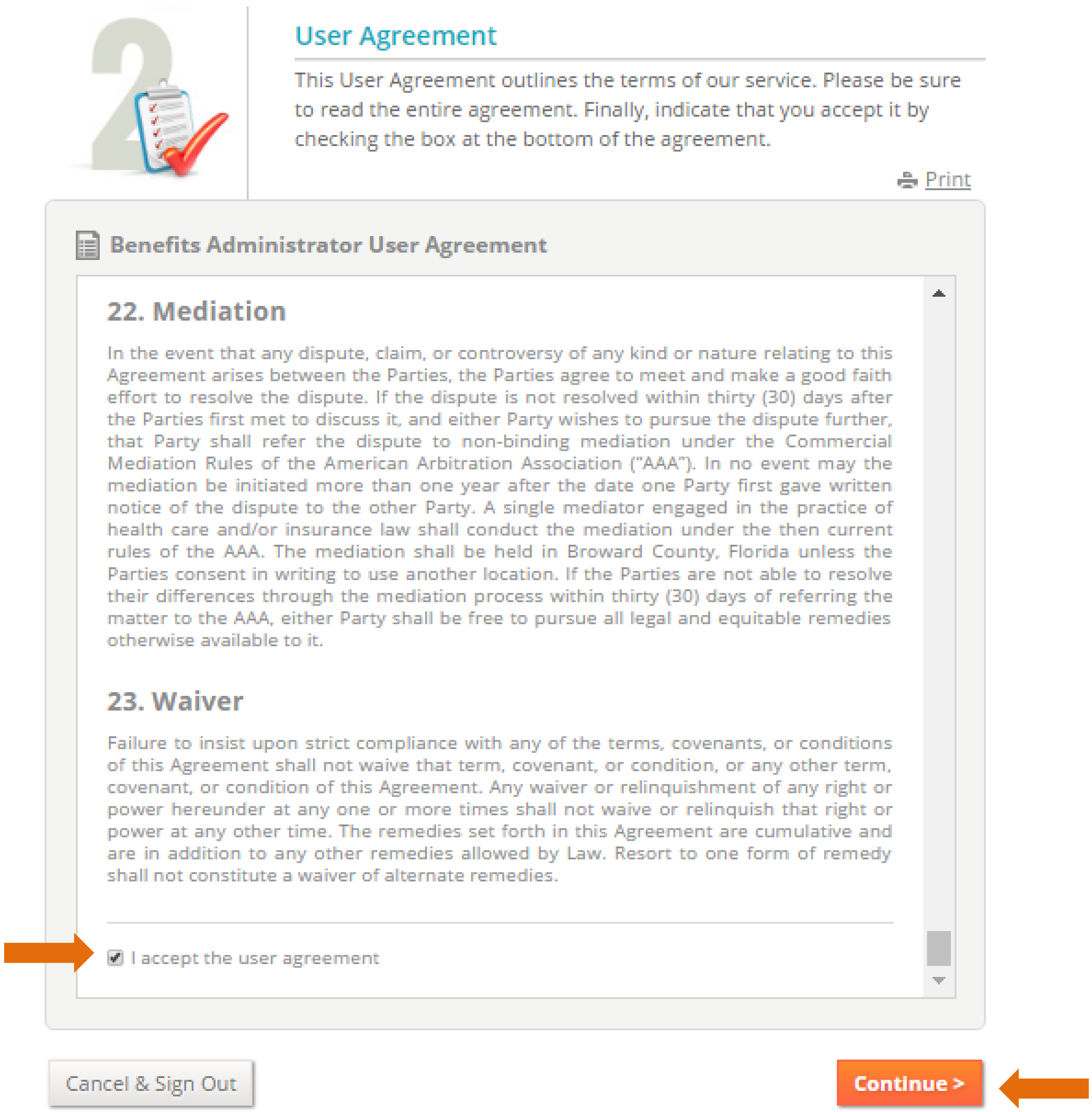


c. Further down the same page, type in answers to the three security questions you selected. We will ask for the answers to these questions to confirm your identity in case you forget your log-in information.





4. Click **Submit** to get to Step 2, the **User Agreement** portion of the process.



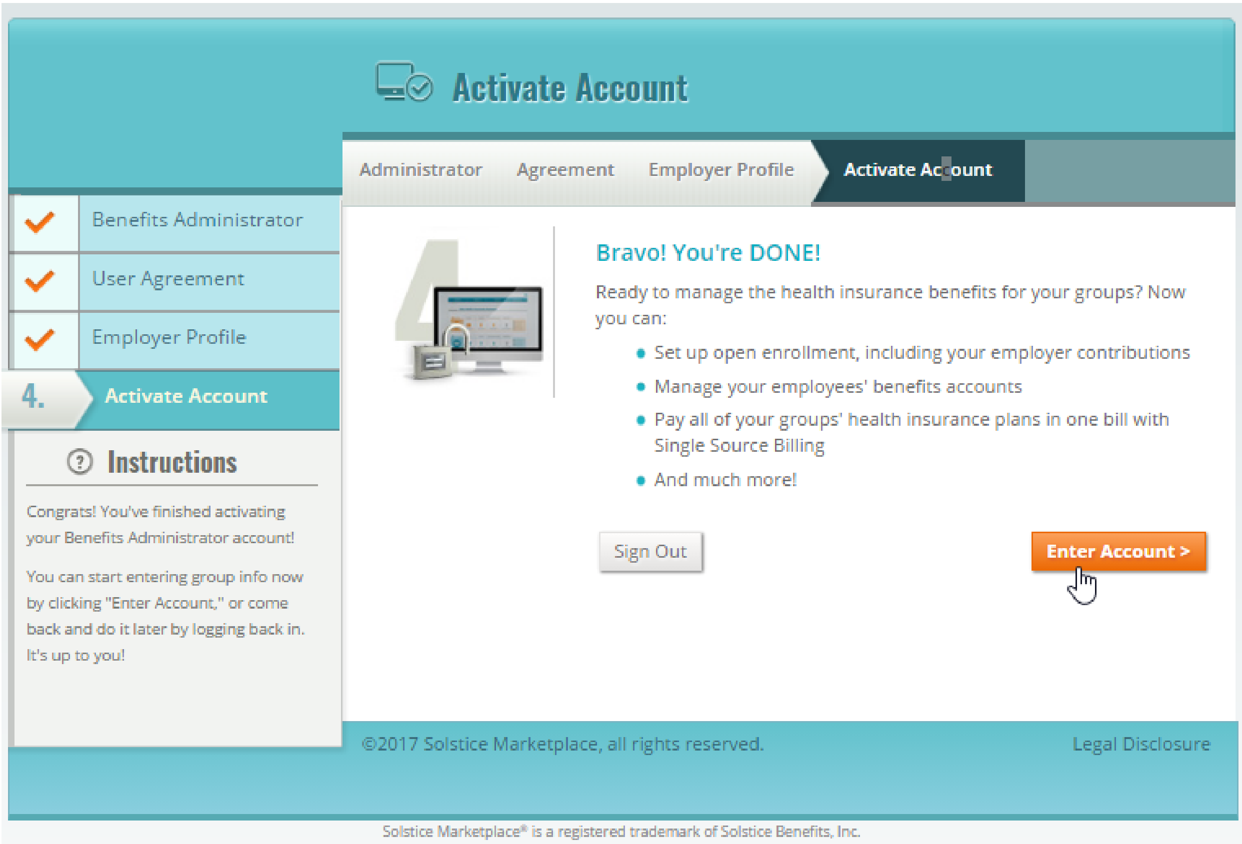
5. Use the scroll right scroll bar to move down the page and review the **User Agreement**.

6. At the end, click the checkbox, indicating that you understand and accept the **User Agreement.**

7. Then, select **Continue** to advance to the next step.

- Once you click **Continue**, you will advance directly to the **Activate Account** page.
- And don't worry, if you log out, the system will automatically pick up where you left off when you log back in.

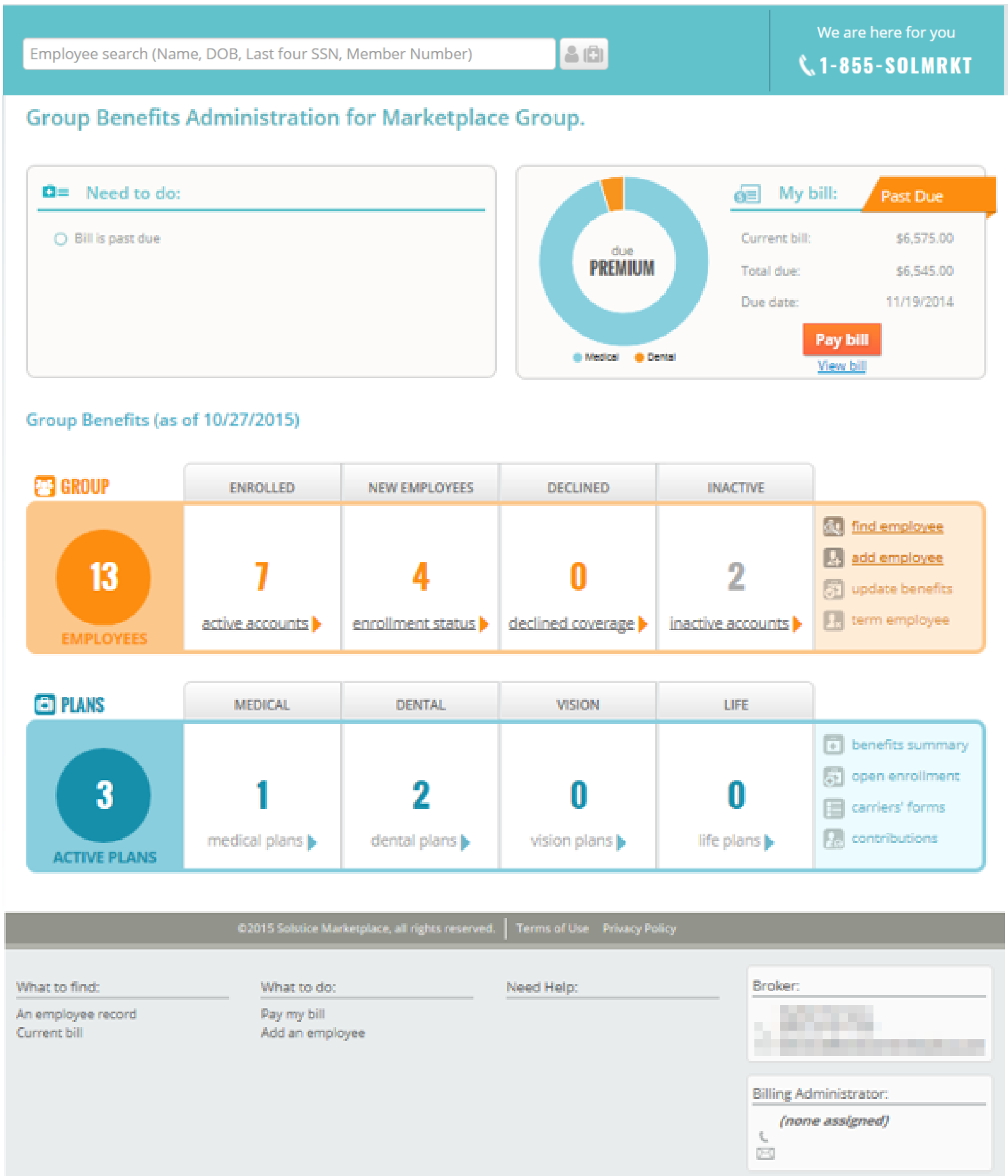
8. Review the information provided and then click on **Enter Account.**



You will be taken to your benefits portal homepage (or dashboard), where all the magic begins!

Benefits Administration Dashboard

Here's your **Benefits Administration Dashboard**. From this page, you can see the benefits status of all your employees and perform a variety of tasks, including adding employees, viewing and paying your bills, and much more!



So, let's get started! *Please note that some details are blurred to protect confidential information.*

Manually Enroll Employees for Benefits

The process of enrolling an employee for benefits has three main steps. They include:

I. Adding the employee to the Marketplace
II. Entering the Enrollment Dates
III. Adding Employee Dependents
IV. Adding Benefits

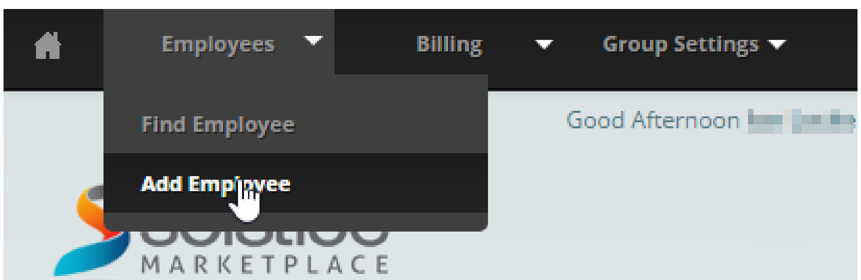
Let's start by adding an employee.

I. Adding an Employee

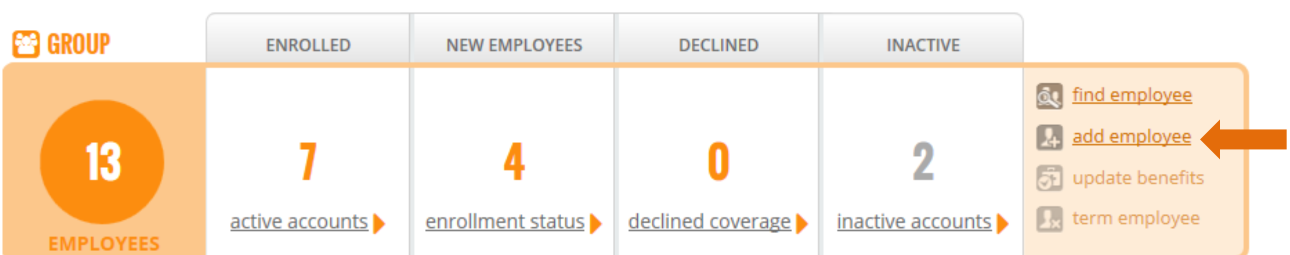
1. Double check to see if the employee you are trying to add is already in the system. This will help you avoid creating duplicates.

2. Once you confirm they are not already in the system, you can add them in two ways.

   Option A: Hover over **Employees** located on the top navigation panel; then, select **Add Employee**



   Option B: Navigate to the group panel on the page and select the **add employee** quick link.

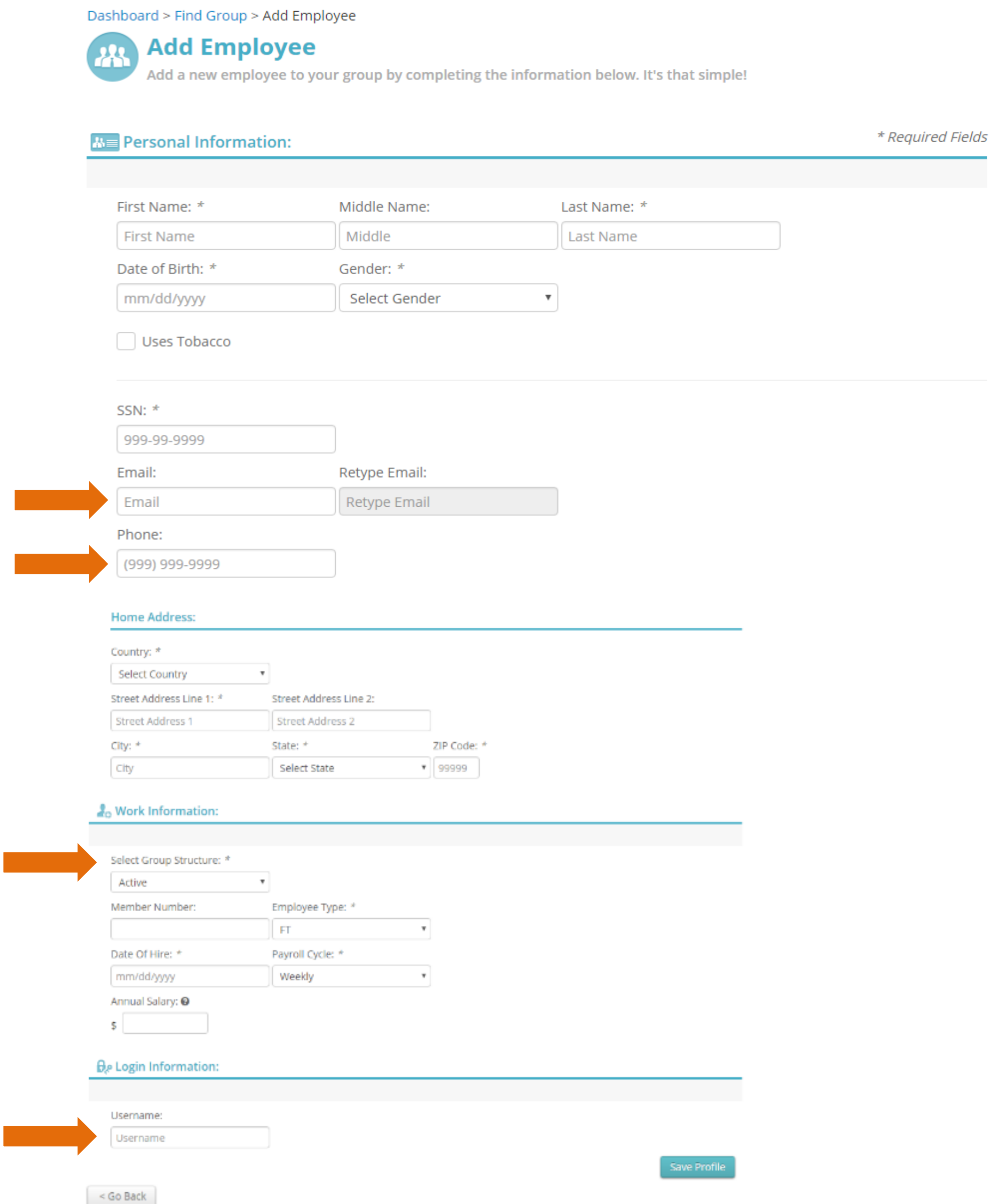


3. Enter the employee's information into the form provided.
   (Don't worry – if you make a mistake, the portal will let you know)

Some things to keep in mind:

a. While the **email and phone number** are not required, *please fill in this information* as it makes it easy to contact the employee and follow up on any questions.

b. Under **Work Information**, click the drop-down arrow beside **Select Group Structure** if your group has multiple divisions or structures and select the specific structure to which your employee is assigned.


Dashboard > Find Group > Add Employee

Add Employee

Add a new employee to your group by completing the information below. It's that simple!

Personal Information:

* Required Fields

First Name: * First Name
Middle Name: Middle
Last Name: * Last Name
Date of Birth: * mm/dd/yyyy
Gender: * Select Gender
Uses Tobacco
SSN: * 999-99-9999
Email: Email
Retype Email: Retype Email
Phone: (999) 999-9999

Home Address:

Country: * Select Country
Street Address Line 1: * Street Address 1
Street Address Line 2: Street Address 2
City: * City
State: * Select State
ZIP Code: * 99999

Work Information:

Select Group Structure: * Active
Member Number:
Employee Type: * FT
Date Of Hire: * mm/dd/yyyy
Payroll Cycle: * Weekly
Annual Salary: $

Login Information:

Username: Username

Save Profile

< Go Back

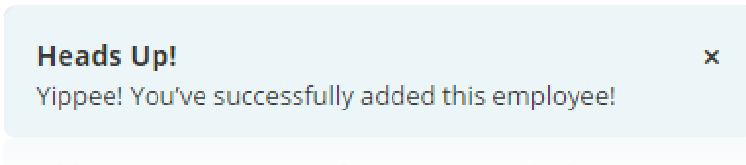
c. **VERY IMPORTANT: Never enter the employees' or their dependents' social security number (SSN) in the Member Number field.** If you have an alternate identification number for the employee or his or her dependent, you may enter this. Otherwise, always leave this cell blank.

Our system will automatically generate an alternate ID number to protect your employee's privacy.

d. There's no need to fill in the **username** as the portal will auto-populate this.

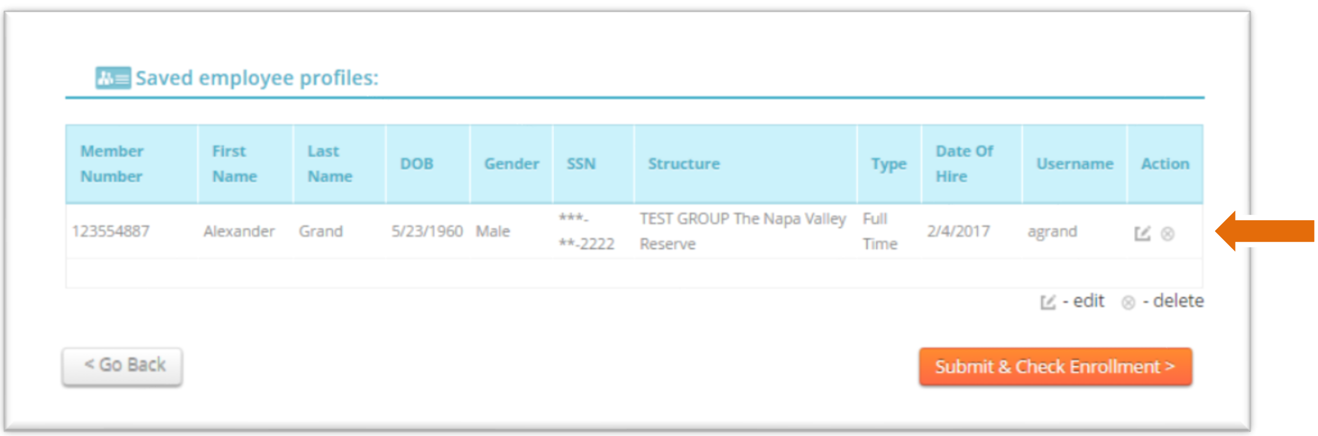
4. Once you have filled out this form, click on **Save Profile**. You will see three things:

a. **Confirmation of Success**: A note at the top of the form will confirm that you have successfully added the employee.



b. **New Form**: Want to add more employees? The system will provide another blank form so you can add additional employees. So, keep adding and selecting **Save Profile** after each entry.

c. **List of Added Employees:** For your convenience, you will see a table at the bottom of the page, listing the employees whose profiles you have saved. **Be sure to scroll all the way to the bottom to see those recently added.**



Saved employee profiles:

Member Number	First Name	Last Name	DOB	Gender	SSN	Structure	Type	Date Of Hire	Username	Action
123554887	Alexander	Grand	5/23/1960	Male	***-**-2222	TEST GROUP The Napa Valley Reserve	Full Time	2/4/2017	agrand	

- edit - delete

< Go Back

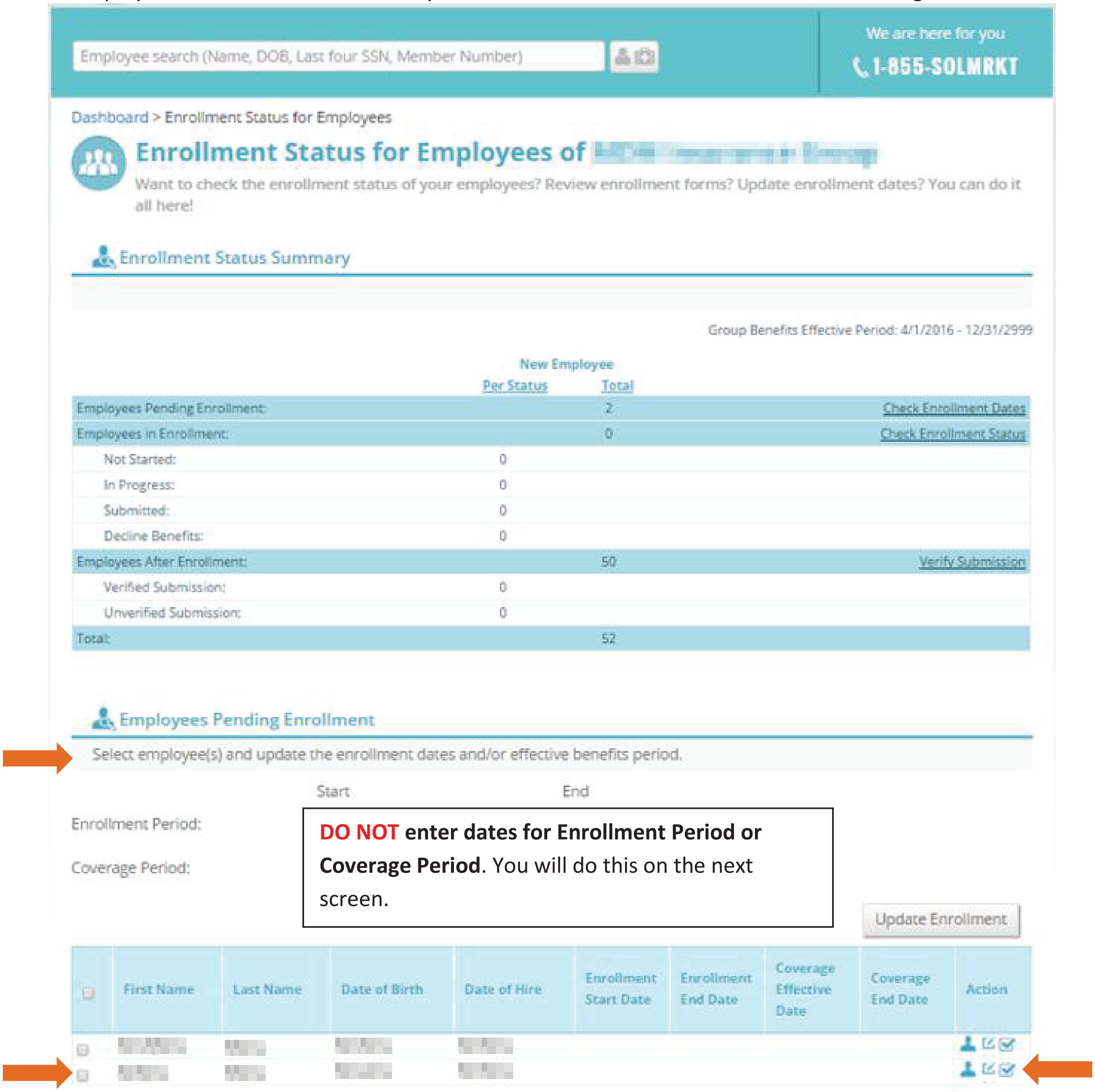
Submit & Check Enrollment >

If you made a mistake on this page, this is a good time to make changes. Simply click on the edit or delete icons located under the **Action** column, and to the right of the employee's name.

5. Once everything is OK, go ahead and select **Submit & Check Enrollment**. **This is an important step in the process so don't forget.** The program will then take you to the **Enrollment Status for Employee Benefits page.**

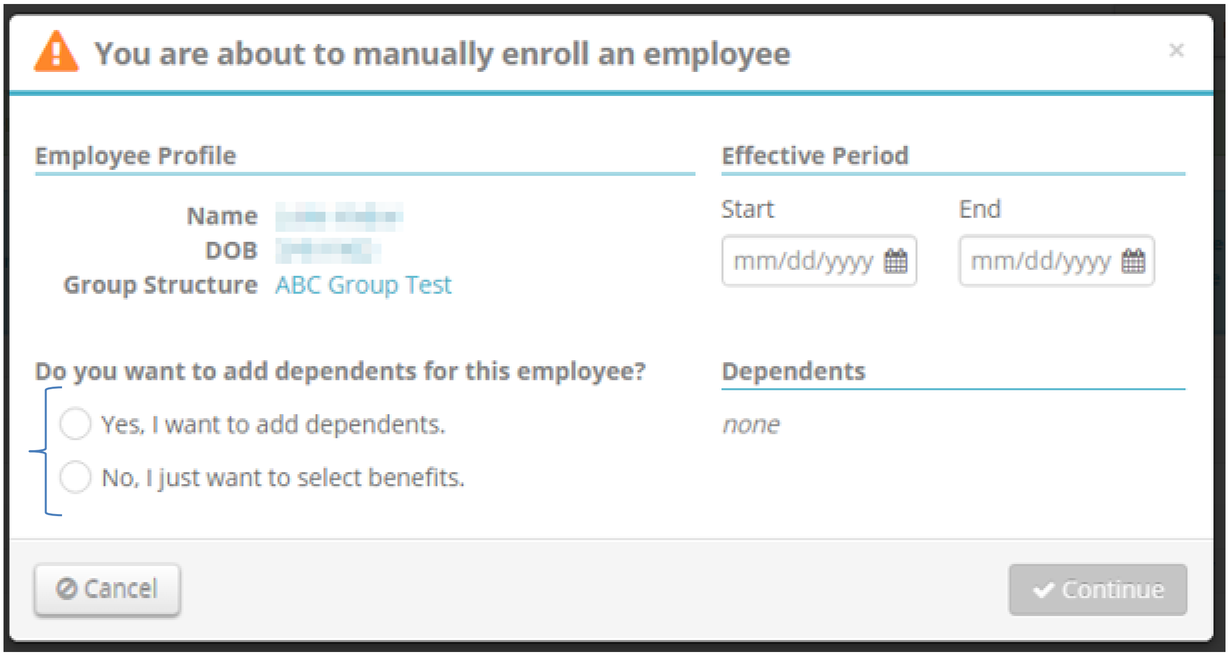
II. Entering Enrollment Dates

Scroll down the page to the section titled **Employees Pending Enrollment.** Here, you will find a list of employees that have been added to your account but have not been enrolled in coverage.



6. Click into the check box that's to the left of the name of the employee you are attempting to enroll.

7. Then, click on the **Enroll Employee** icon ( )to the right of the name.
You will get a dialogue box below that will give you the option to *add dependents* or *simply select* benefits.



Before we go any further, here are a few things to keep in mind about the Effective Period information:

a. **Start Date:** Your enrollment period **Start** date must be the first day of a given month.

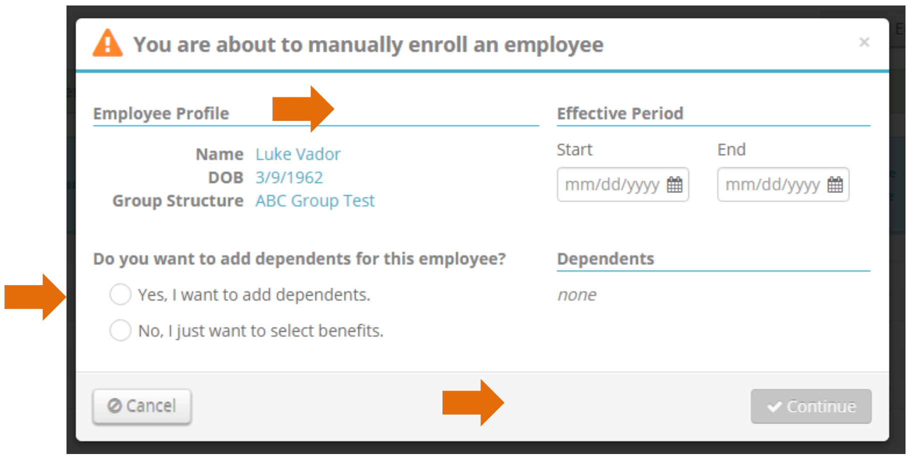
b. **End Date:** Use 12/31/2999 as the **End** date. This ensures that the employee's benefits will perpetually be in effect.

c. **Invoice Tip:** It's important to know that invoices are generated a month in advance. Changes you make *after* the invoice has been generated *will not be reflected until the following month.* For example, if February's invoice is prepared and generated by January 11th, changes made after this date will not be reflected on the February invoice; instead, they will show up as retroactivity on the March invoice.

   If you have questions concerning this, be sure to reach out to your billing and eligibility coordinator. They're happy to help!

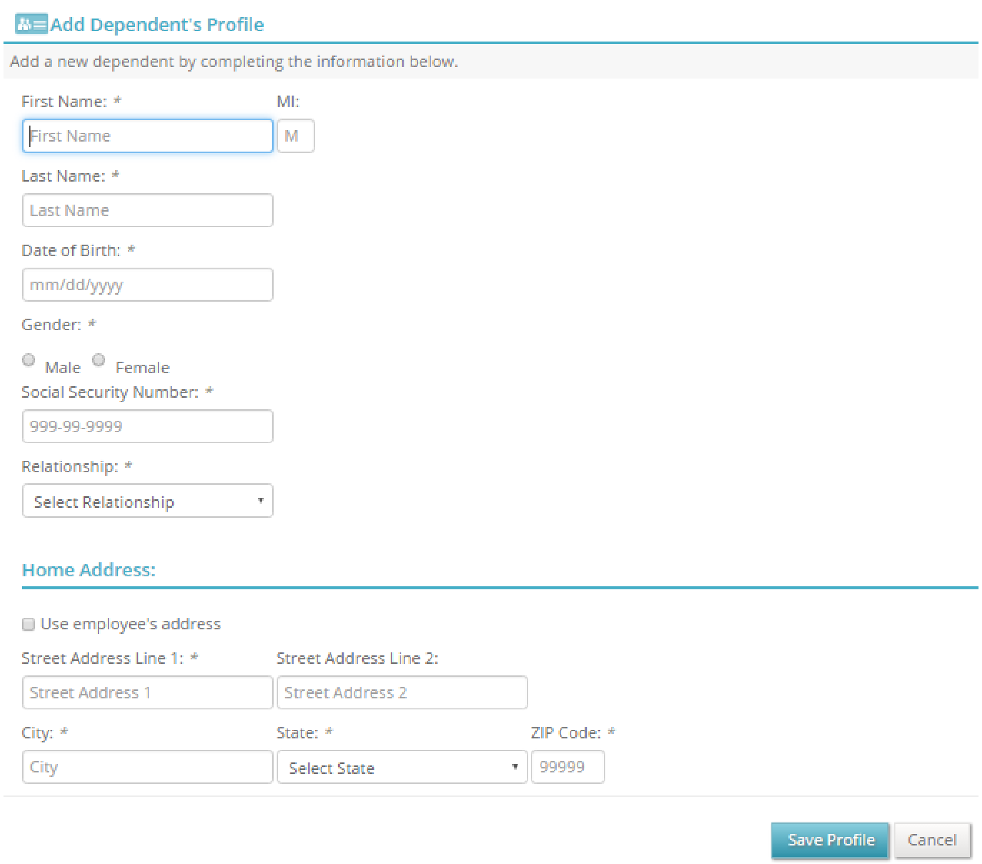
Adding Employee Dependents

If your employee has dependents, you will want to add them before you select benefits. So, let's walk through the steps of adding dependents.

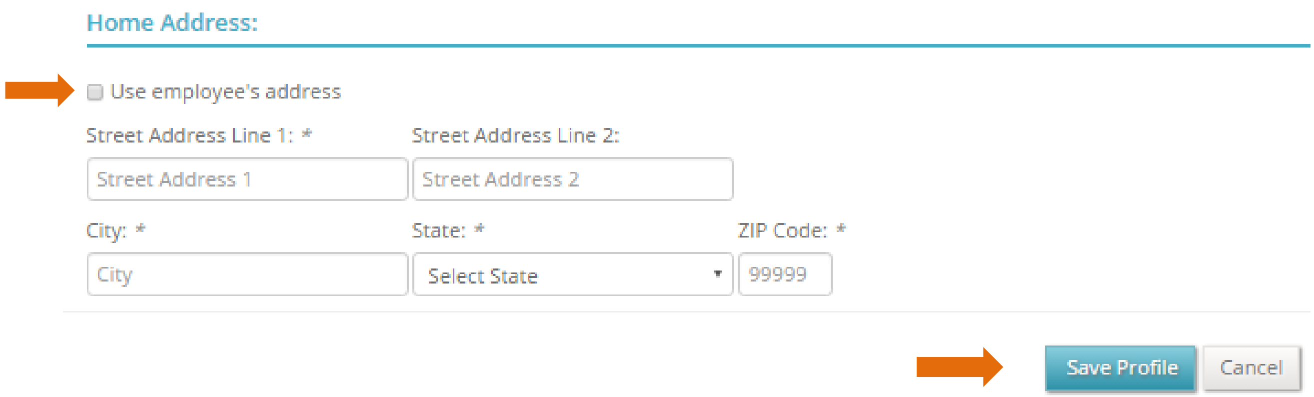


8. Click the checkbox **Yes, I want to add dependents**.

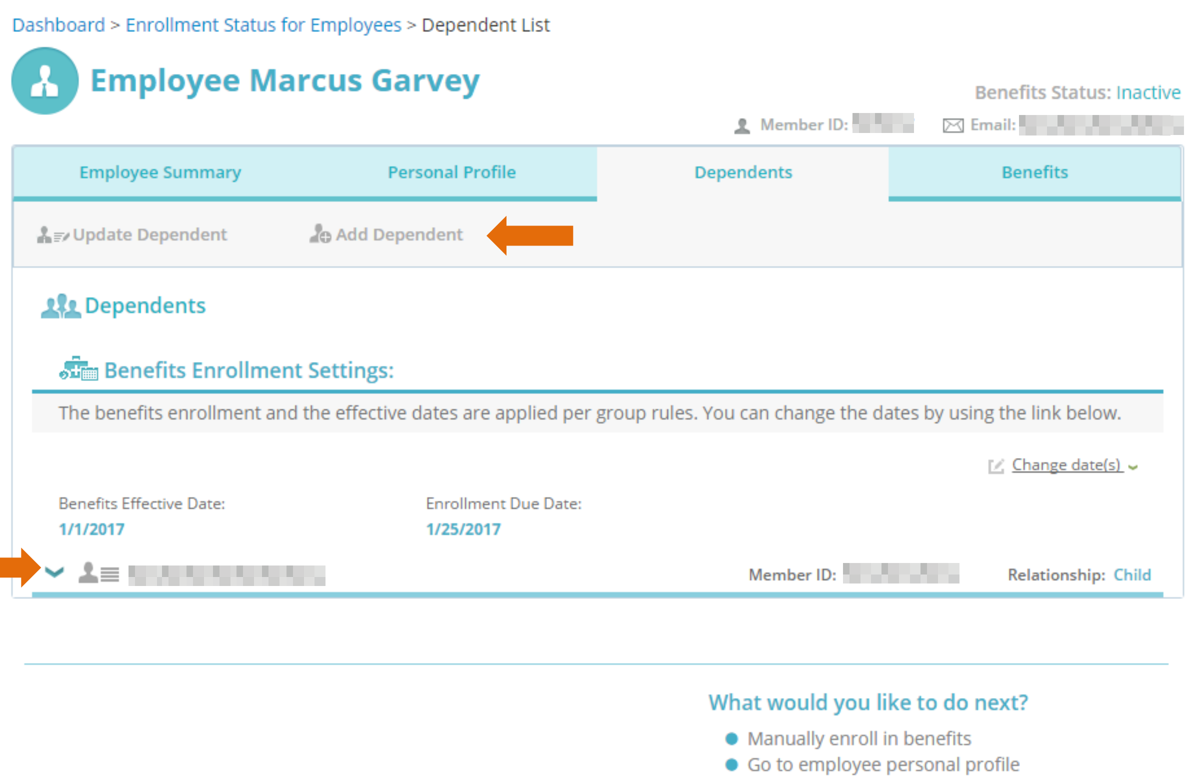
9. Enter the **Effective Period Start** and **End** dates (based on the previously stated guidelines) and click **Continue**. Clicking **Continue** will take you to the dependent profile form, seen on page 15.



10. Fill in the requested information into the dependent profile form. And to save time, if the employee and the dependent share the same address, simply click the checkbox to the left of **Use employee's address** (below) and the system will populate the subscriber's address for that dependent.



11. Once you have completed the required information, select **Save Profile**. On the following **Dependents** page, you will see the dependent(s) you added.

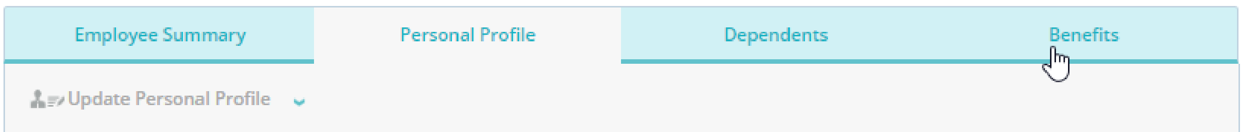


From here, you can add another dependent by clicking **Add Dependent** (located on the upper gray ribbon). The portal will provide you with a new form. Fill out the requested information as you did before and **Save Profile** each time.

Adding Benefits

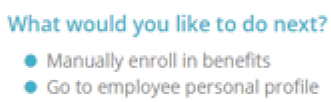
It's time to assign **Benefits** to the employee and his or her dependents.

There are two ways to do this. You may select **Benefits** from the upper ribbon on this page.



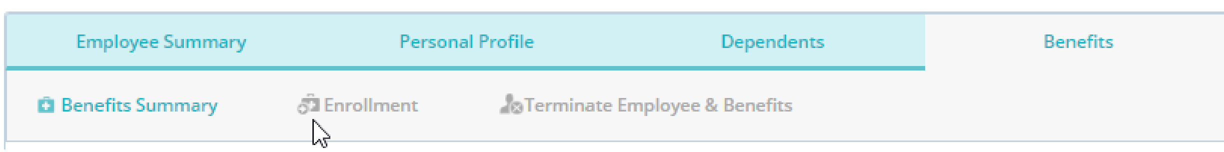
OR

Use the quick links, seen below, to **Manually enroll in benefits.**



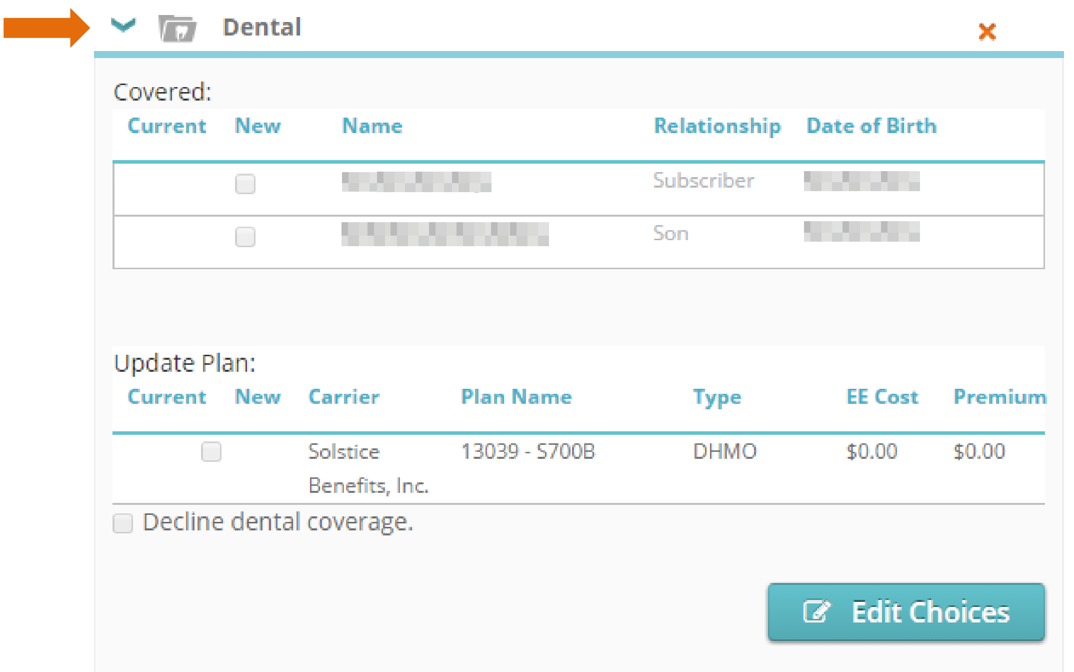
1. Click on **Benefits**.

2. Then, click on **Enrollment**

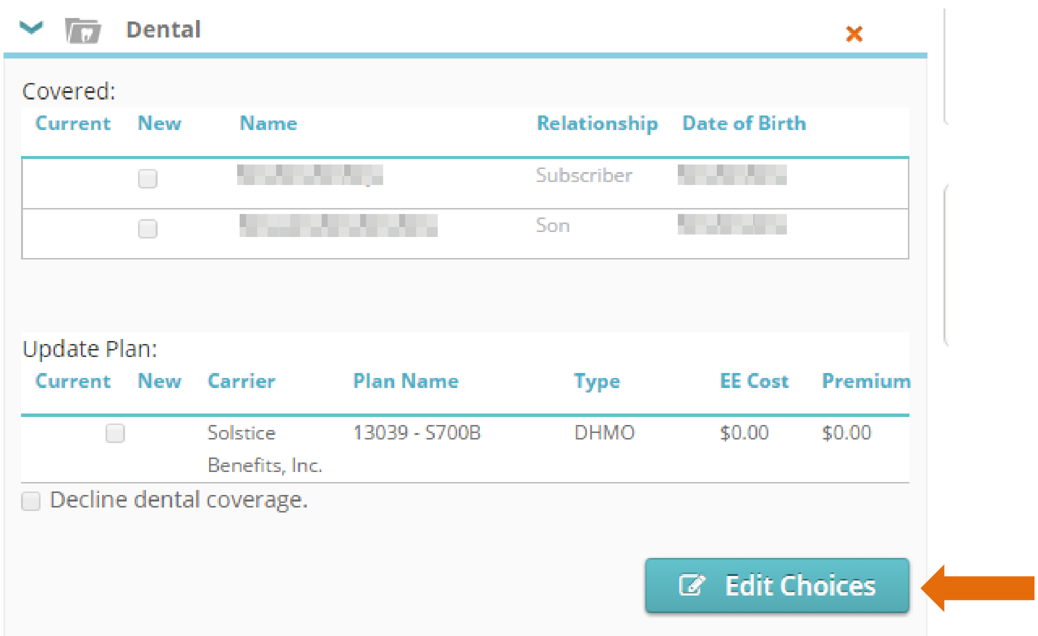


This will take you to the **Benefits Summary** page, where you can select benefits for your employee and his or her family.

3. To see the plan types available under each product (in this case **Dental**) click on the drop-down arrow, right before **Dental**. It will expand and show your employees' dental plan options.

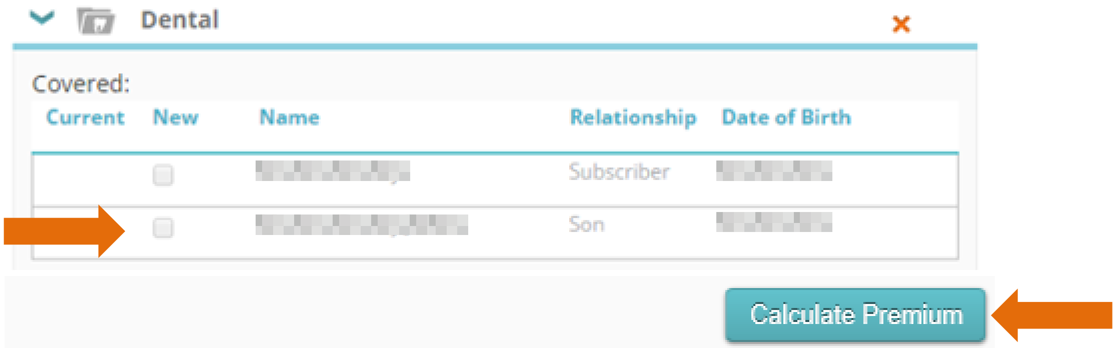


4. Then select the **Edit Choices** button; this will unlock the section.

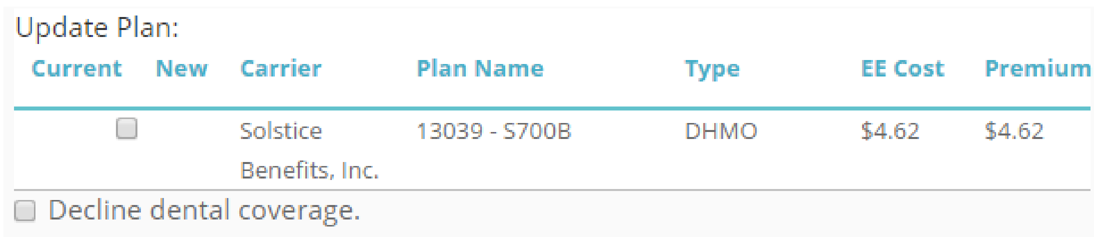


5. Select either the employee or the dependent for whom you are selecting benefits.

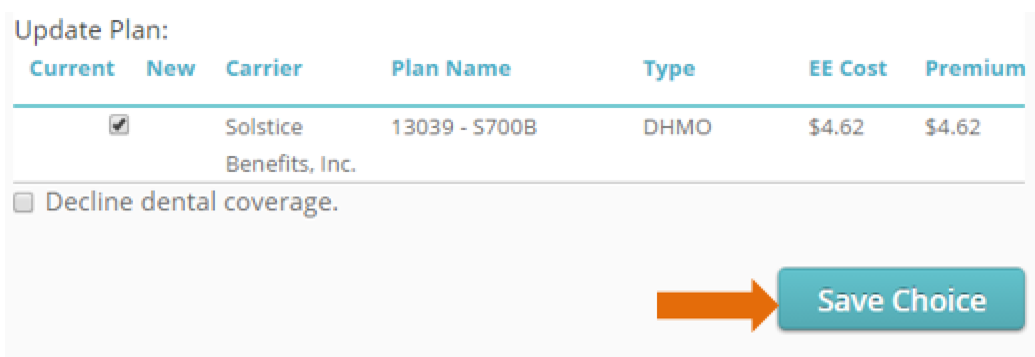
Note: When you select a dependent, the employee will automatically be selected as well.



6. Click **Calculate Premium** to display the cost for each dental benefit product available to your employees. It's *only after you select **Calculate Premium*** will you be able to select the specific dental plan you want to assign to your employee.

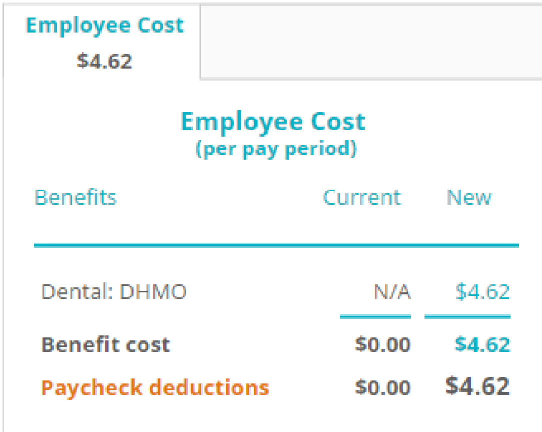


7. Go ahead and click the checkbox beside the specific dental (or vision) plan you want to assign to your employee and his or her family.



8. Then, click **Save Choice**.

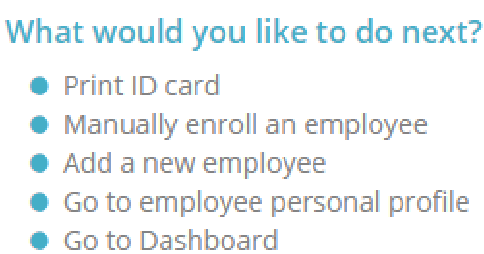
Just before you click **Submit**, look to the right and review the **Employee Cost Calculator**; it will display the complete benefit cost, as well as the amount that will be deducted from the employee's paycheck per the selected pay period.



9. Finally, click **Submit** to complete the process of assigning benefits. *Don't forget this last step.*

And that's it. You've just added an employee, his or her dependents and assigned benefits to the family.

Do you have some other tasks to do? Use the quick links to quickly perform these tasks.



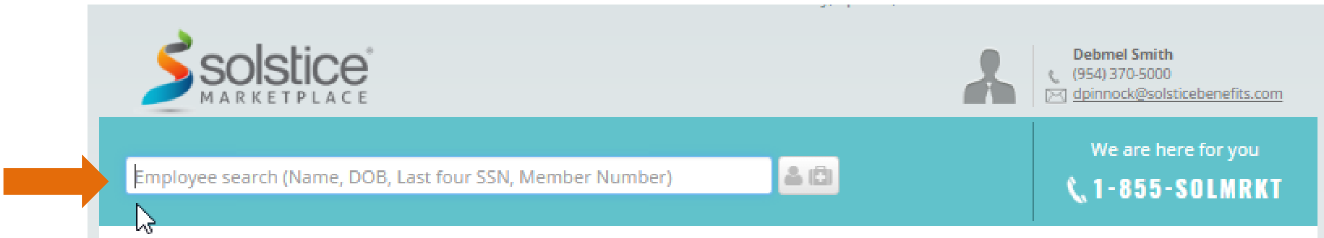
***Quick Note:** If your group has vision with our partner, Davis Vision, Inc. (Davis), employees will receive their IDs from them; therefore, the Print ID card link in the portal will not generate ID cards for your employees.

Add Dependents After Employee Effective Date

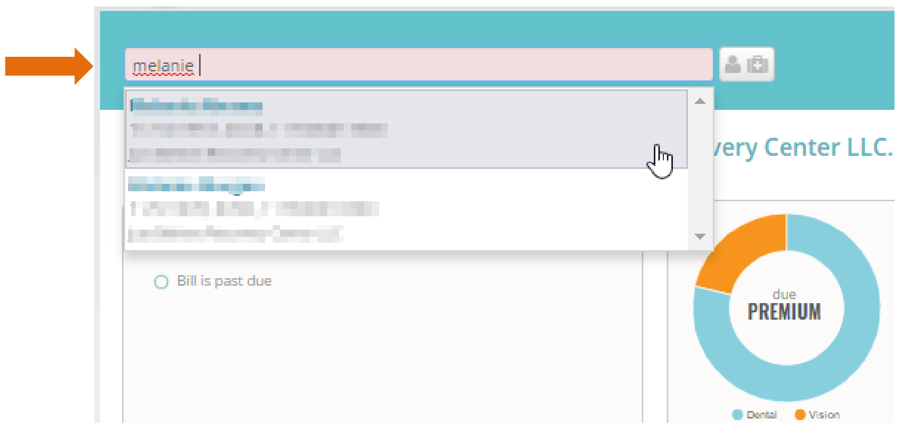
Undoubtedly, you are going to have employees go through open enrollment, become effective on the plan, and then need to add a spouse or children to the plan. Here's how to add dependents after the employee's effective date.

1. Your first task is to find the employee. You may do so in two ways:

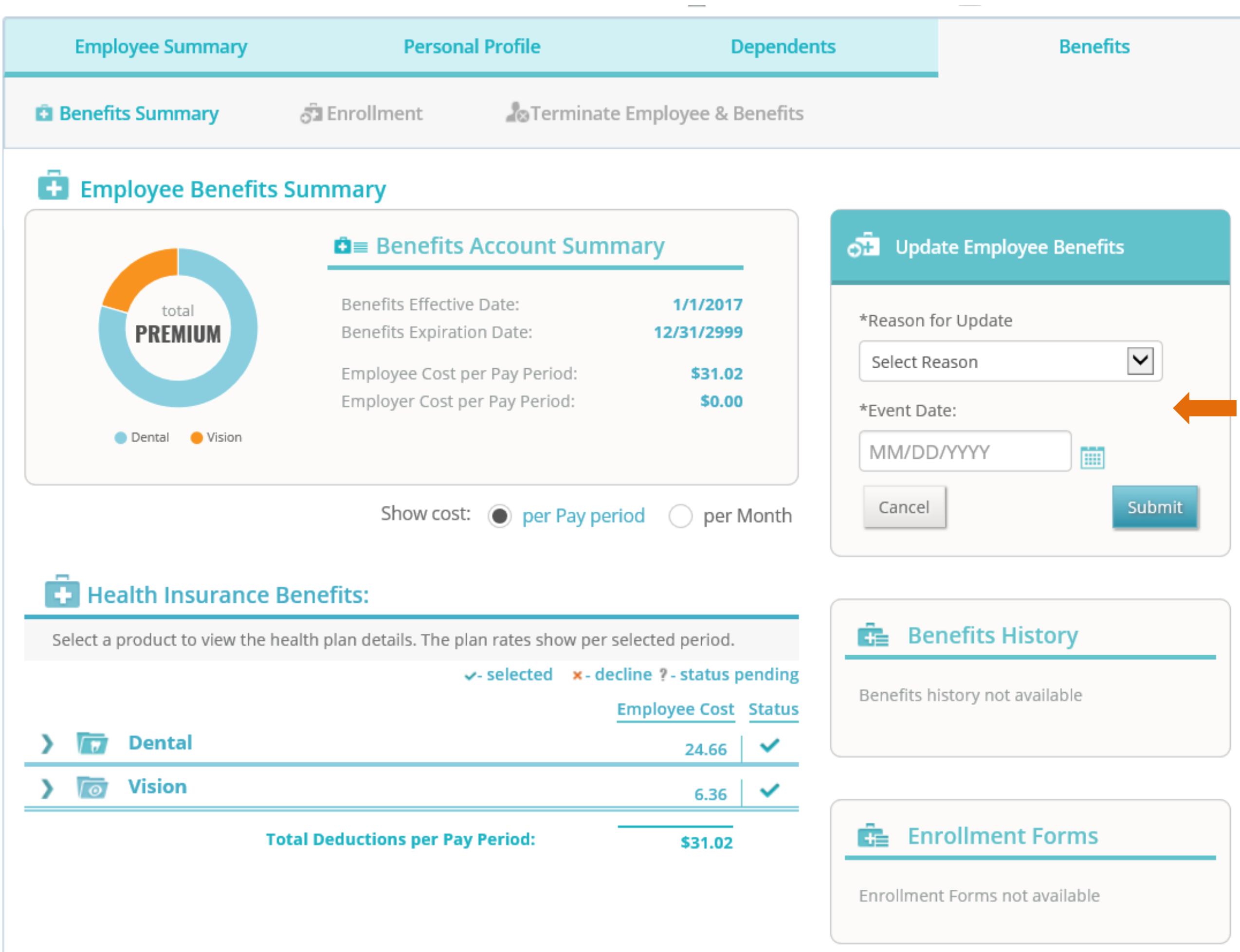
a. Enter the employee’s name or other search options into the search panel found at the top of the page.



- Once you type in the name, the system will generate all employees with that name. Simply move your cursor over the correct employee and select him or her.

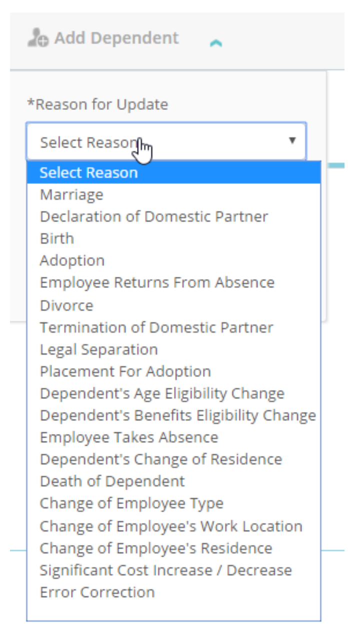


- Then click on the Benefit Summary icon () to the right of the search panel, and the system will take you directly to the Benefit Summary page.

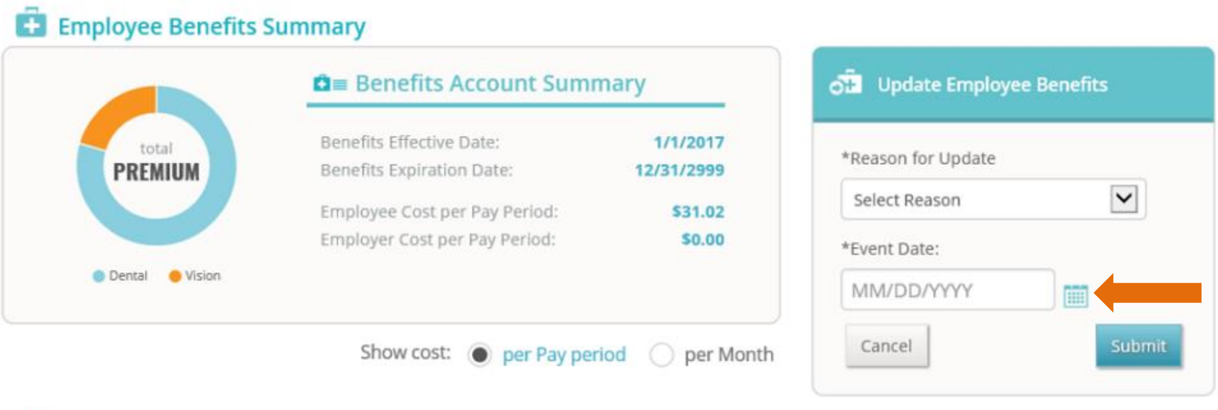


3. Click into the **Reason for Update** box and the system will provide you with various qualifying events for adding a dependent after the initial effective date.

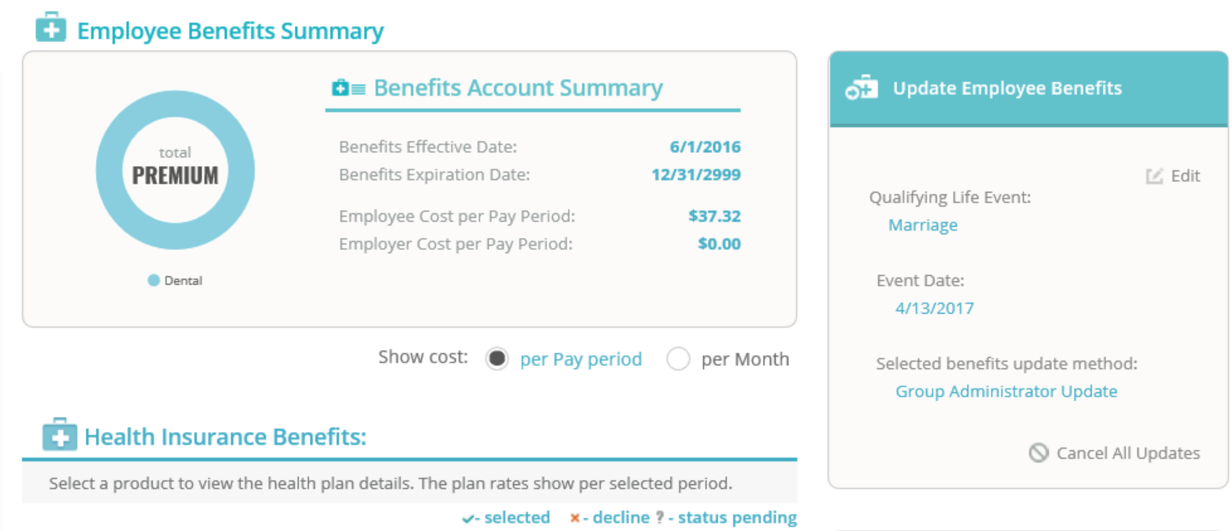
4. Select the reason that applies.



5. In the field for **Event Date**, enter today’s date or use the pop-up calendar to select the date.

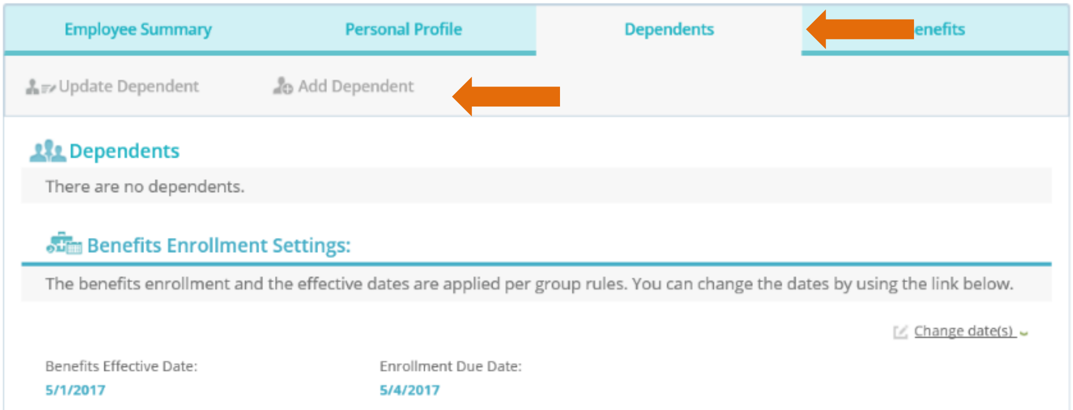


6. Once you have entered the dates, click **Submit**. The system will display the information you just entered.

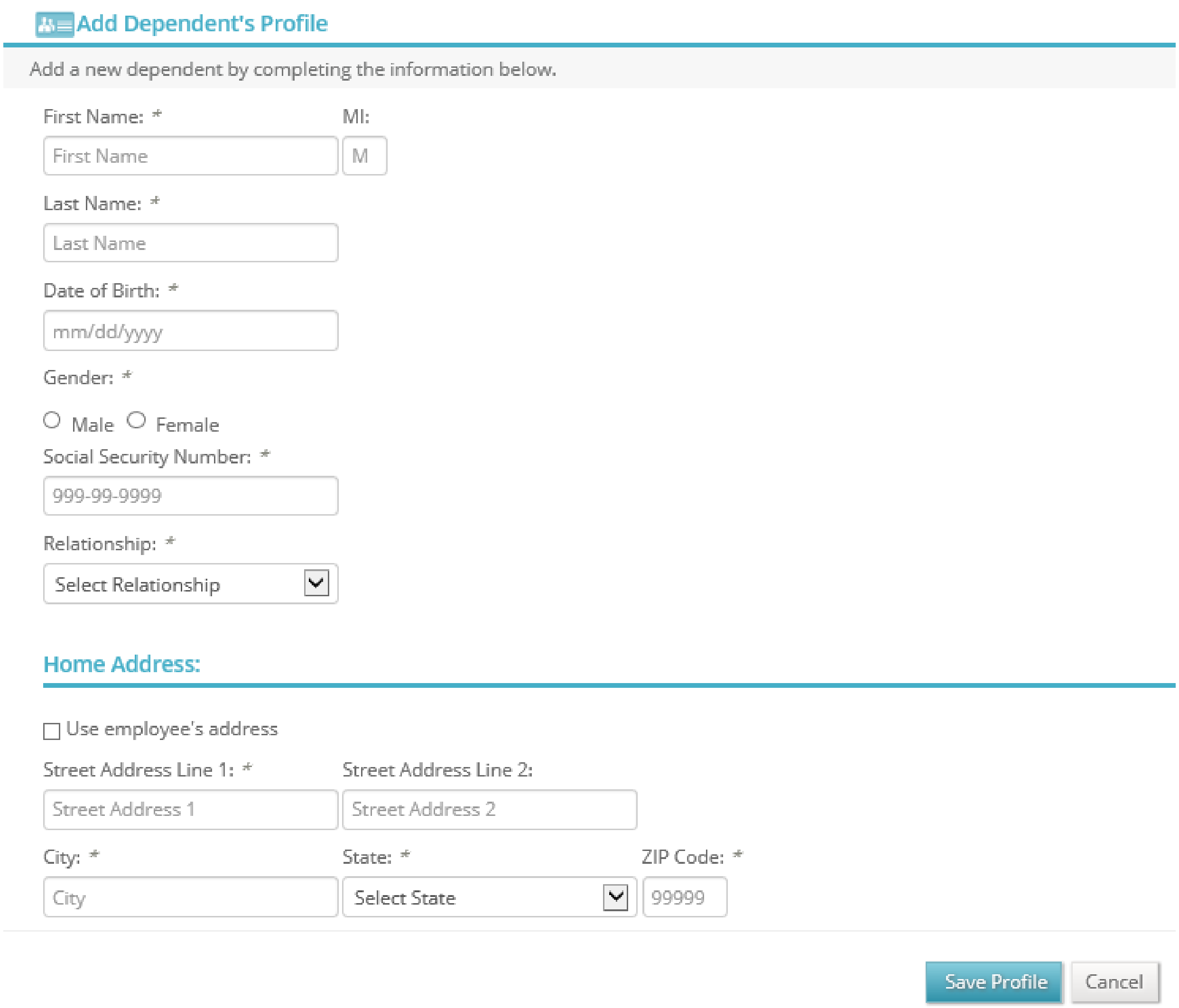


7. Then click on the **Dependents** tab

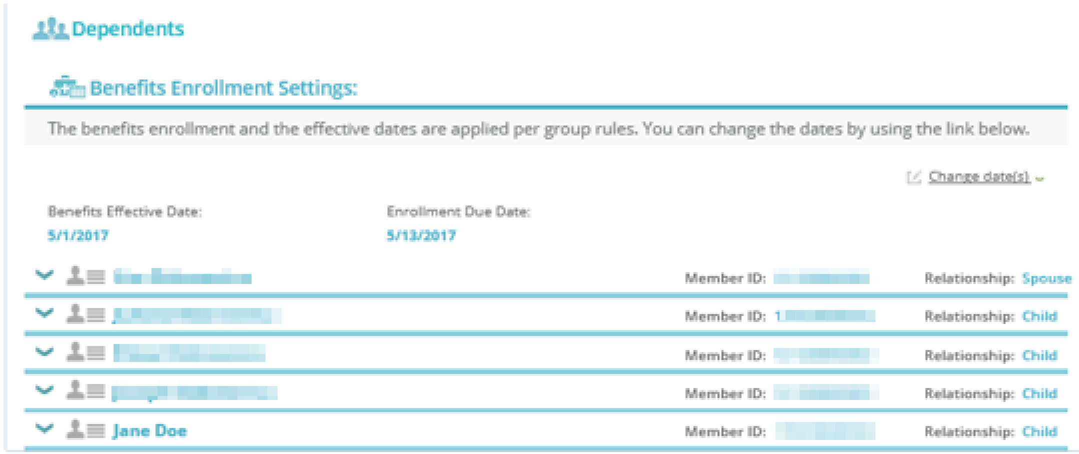
8. After that, click **Add Dependent.**



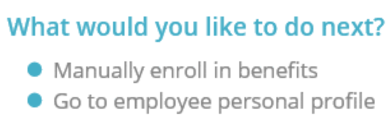
9. Then from here, fill in the requested information.



10. Once this is complete, **Save Profile**. The system will display all dependents.



Right below this screen, you will see two quick links.



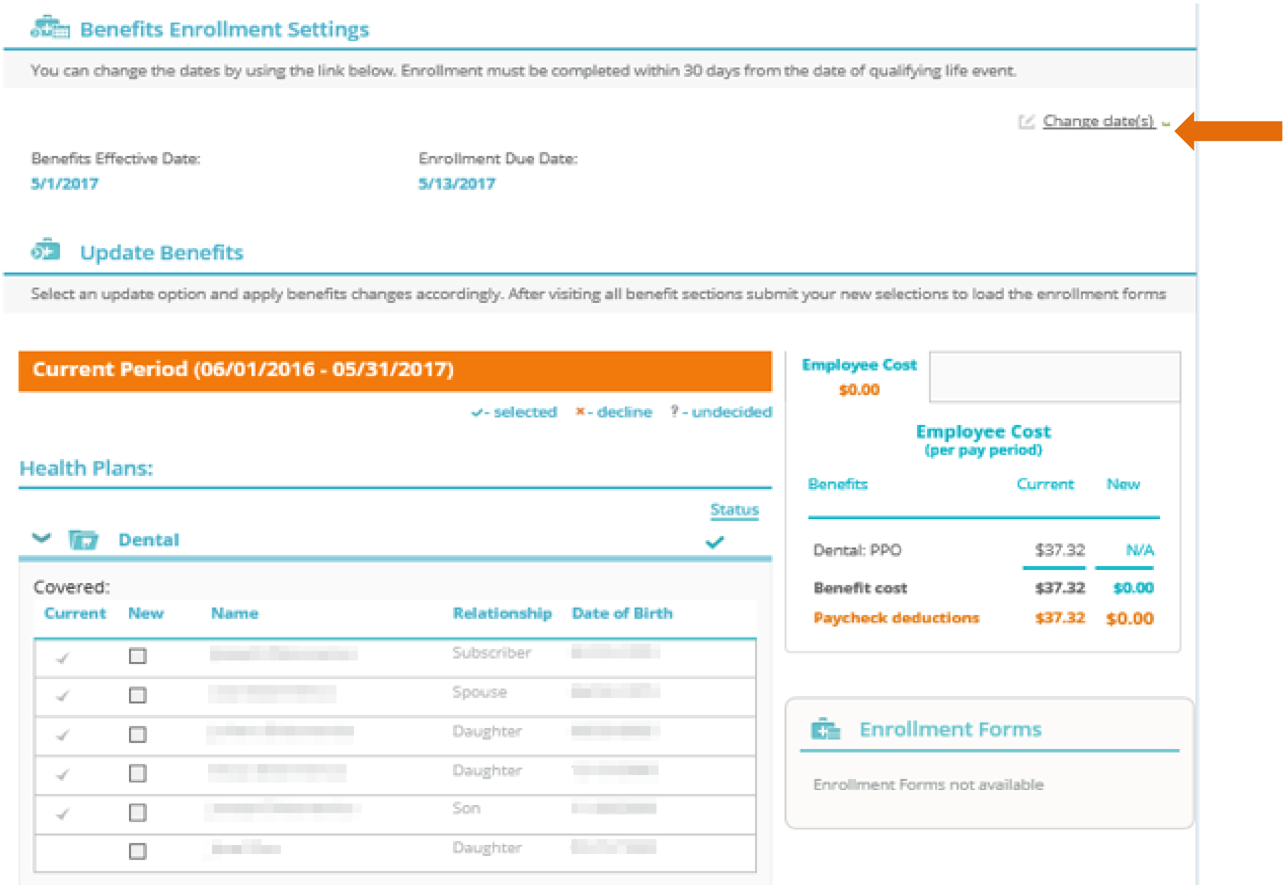
11. Select the **Manually enroll in benefits** quick link to add benefits to the newly added dependent(s).

Some things to keep in mind:

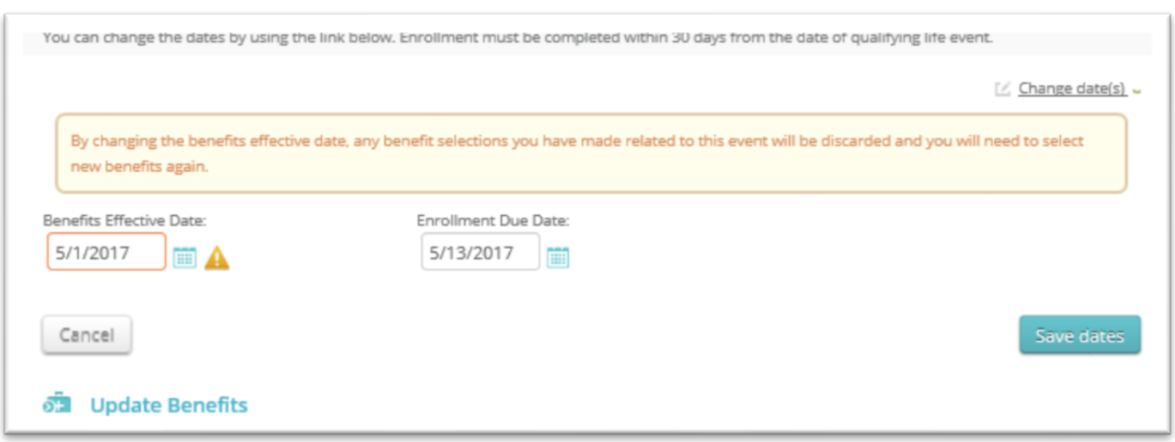
a. The benefit effective date must be listed as the **first of a month**.

b. The enrollment due date should be listed as the same date the event is updated in the system (today's date).

12. Once you get to the **Benefits Enrollment** page, click on the option to **Change dates.**

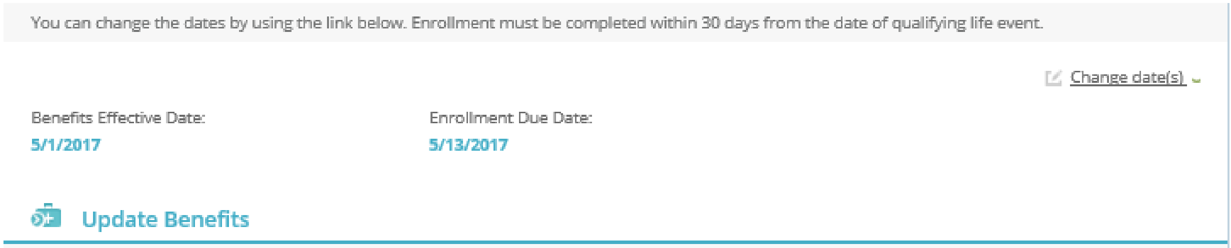


You will see the following note.

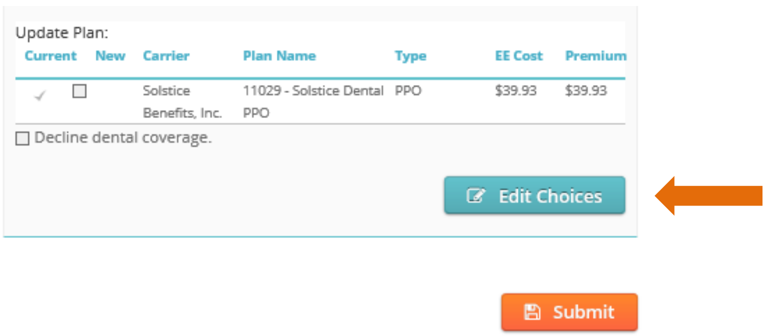


13. Update the **Benefits Effective Date.** Do not change the **Enrollment Due Dates**.

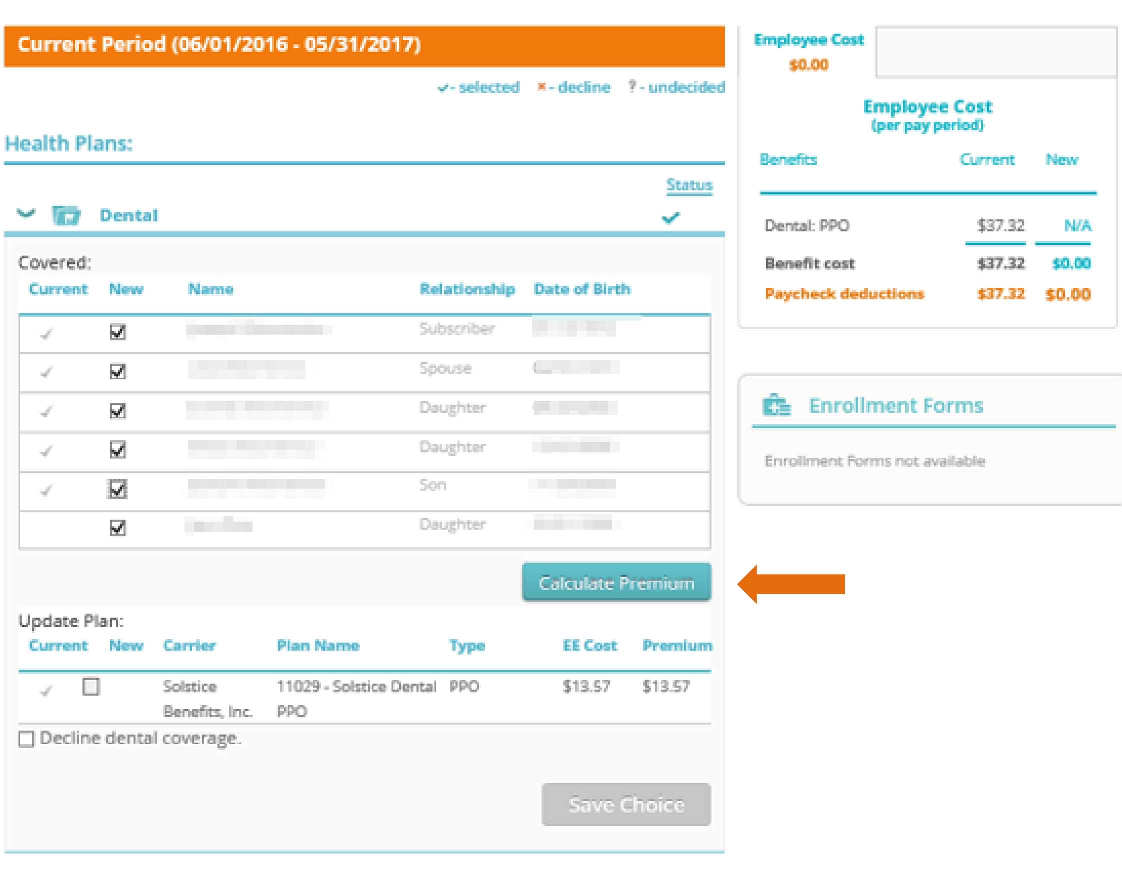
14. Then, select **Save Dates**.



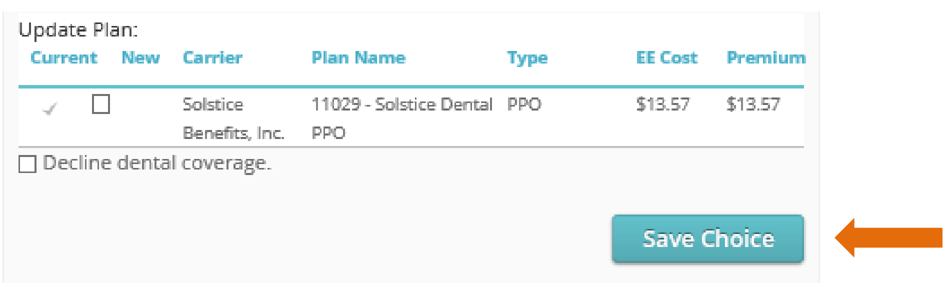
15. You will see the option **Edit Choices** on this page. Select it, and it will allow you to select the dependents to whom you want to assign benefits (seen on page 27).



16. Click **Calculate Premium**.

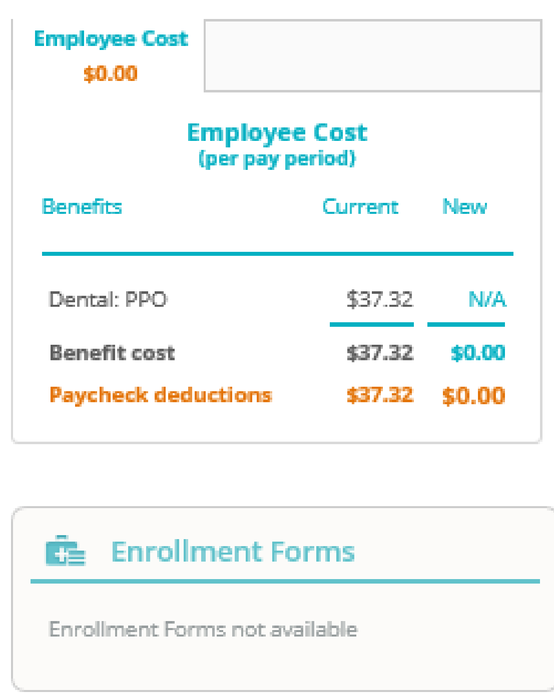


17. Click the checkbox in front of the appropriate plan.

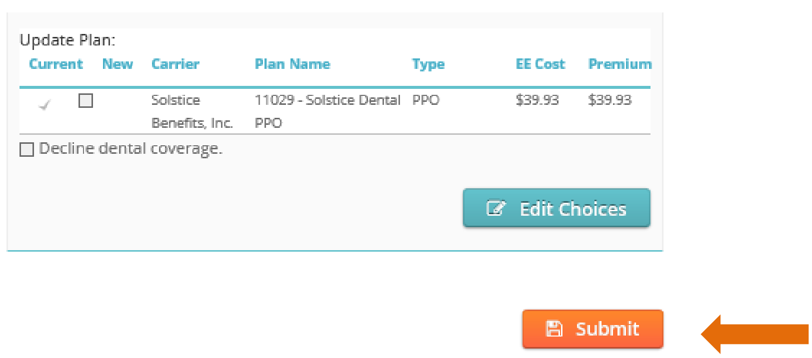


18. Then **Save Choice**.

The **Employee Cost** calculator directly to the right, will display the new dollar amount the subscriber will be billed per pay period.



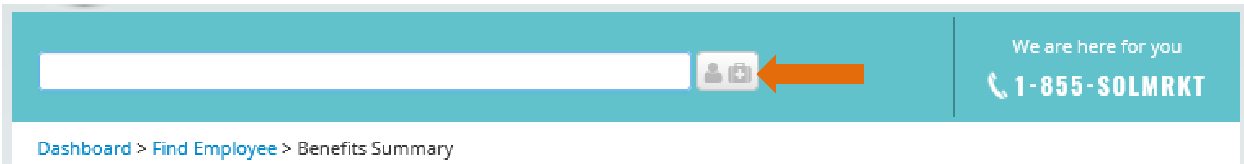
19. Once you are OK with the update, then click **Submit**



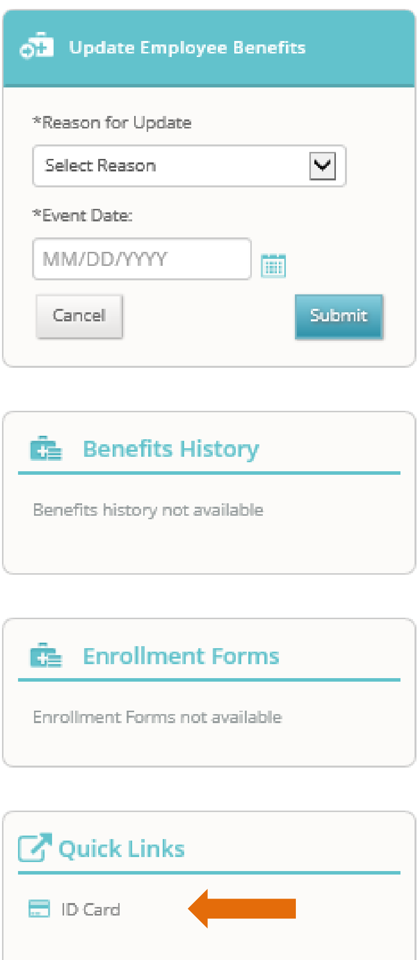
Print an ID Card

With your benefits portal, you can easily print an ID card for an employee. It might even be one of the easiest things you do all day. Here are some quick instructions:

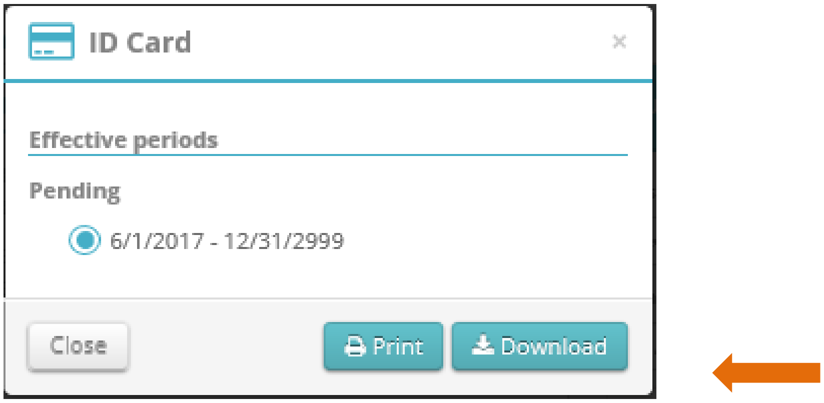
1. First, find the employee. You can simply type in the employee's name into the top search panel, enter his or her DOB, or member number.



2. Once you have entered his or her name, click on the briefcase icon and this will take you to the **Benefits Summary** page. When you get there, look on the right column and you will see the **ID Card Quick Links** option.

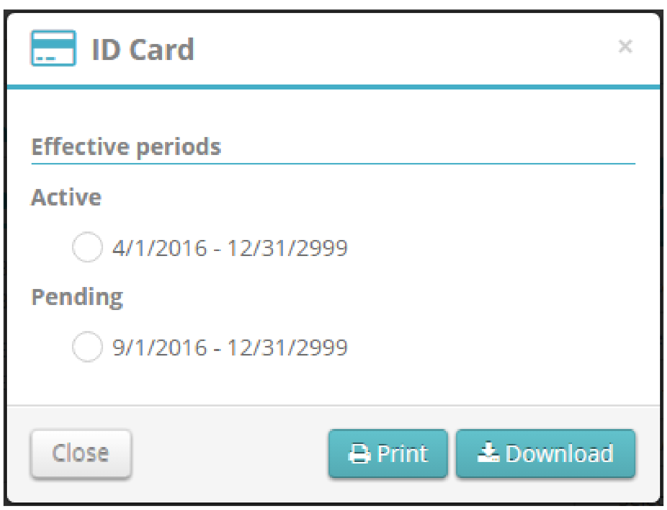


3. Click the quick link option, **ID Card.** From here**,** you can simply print or download the ID and email it to the employee.



There may be times if your group is about to go through a renewal, that you will see two **Effective period** options: active and pending. This means, you can select to have an ID card that reflects the employee's current benefits information **(Active**) or one that reflects the new benefits information (**Pending**).

4. Select the desired **Effective periods**



Some things to keep in mind:

- Once you download the ID card, you can email it to your employee.
- Don't forget that employees can print an additional ID card by going directly to their Solstice portal (www. mySolstice.net portal).
- **Reminder:** If your group has vision with our partner, Davis Vision, Inc. (Davis), they will send your employees their ID cards; therefore, your benefits portal will not be able to generate ID cards for employees with this plan.

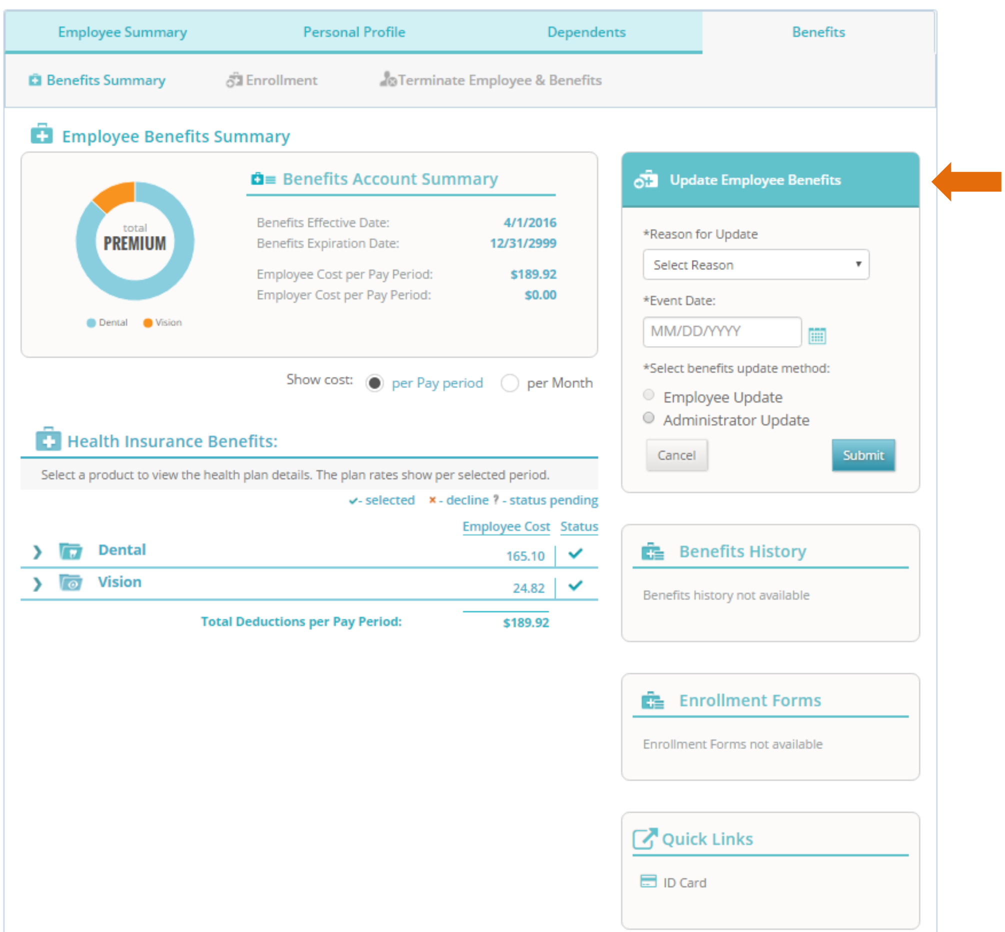
Terminate Employee Benefits

Here's how:

1. First, find the employee. You can simply type in the employee's name into the top search panel, enter his or her DOB, or member number.

Once you have entered his or her name, click on the briefcase icon and this will take you to the **Benefits Summary** page.

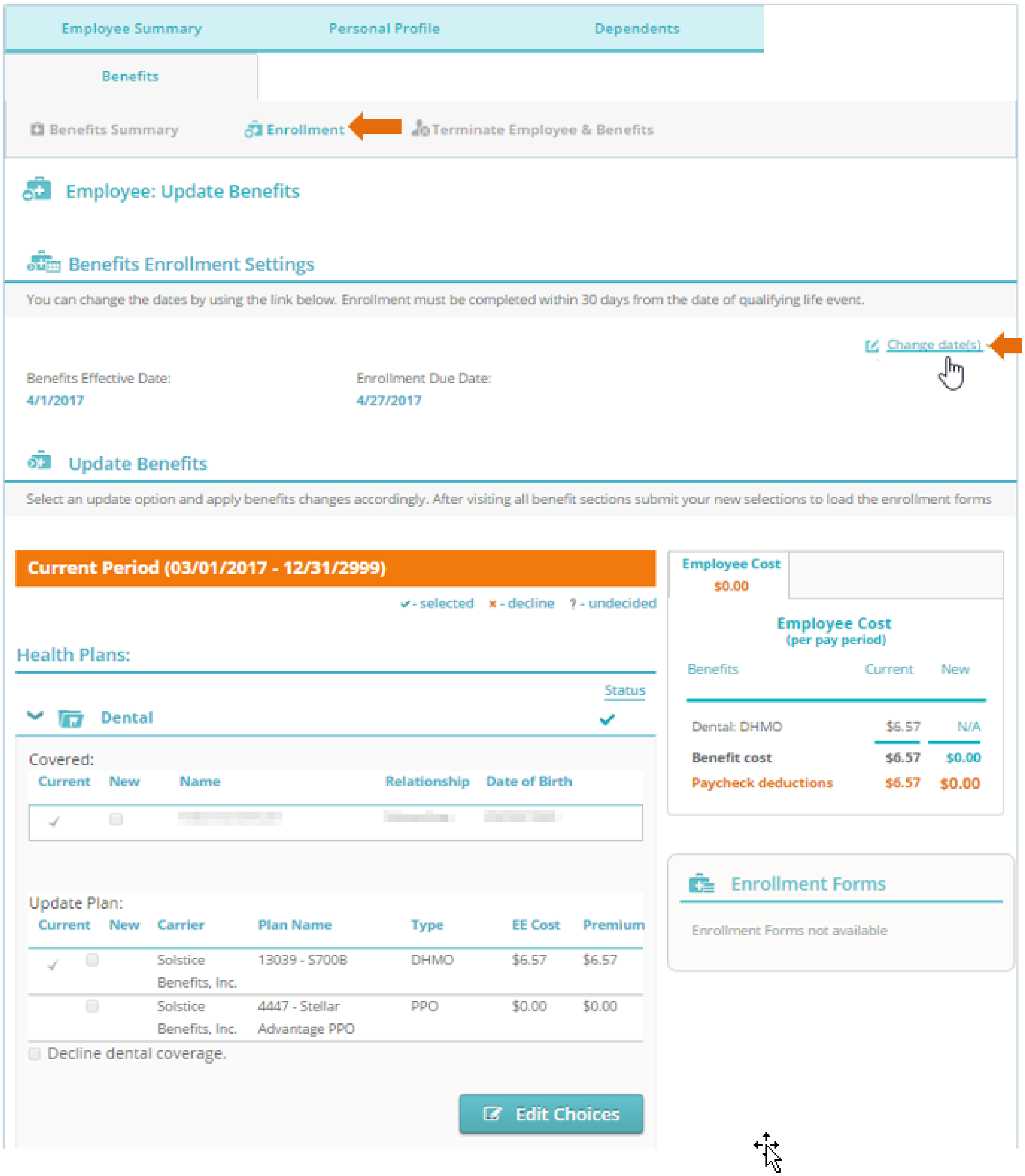
2. To terminate benefits navigate to **Update Employee Benefits** and enter the reason for terminating benefits under **Reason for Update.**



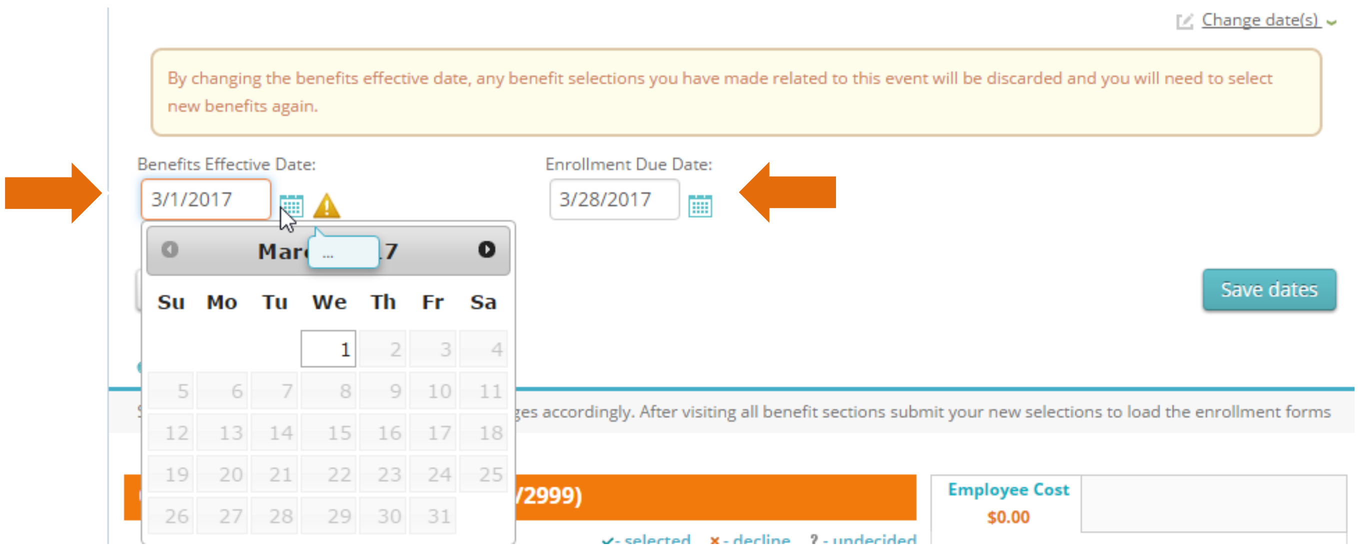
5. In **Event Date**, enter *today's date* and select **Submit.**

6. Click **Enrollment**

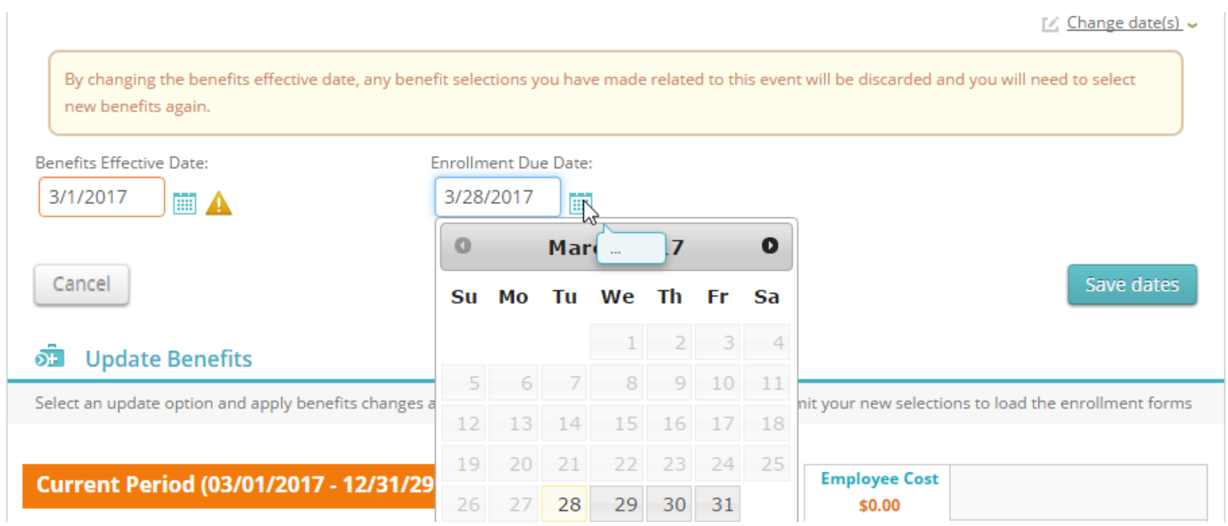
7. Then, click **Change dates.**



8. Click into the **Benefits Effective Date** and use the pop-up calendar to change the **Benefits Effective Date** to the first of the following month, which represents the date you want coverage to cease. In the example shown below, selecting 3/1/2017 will end coverage on 2/28/2017.

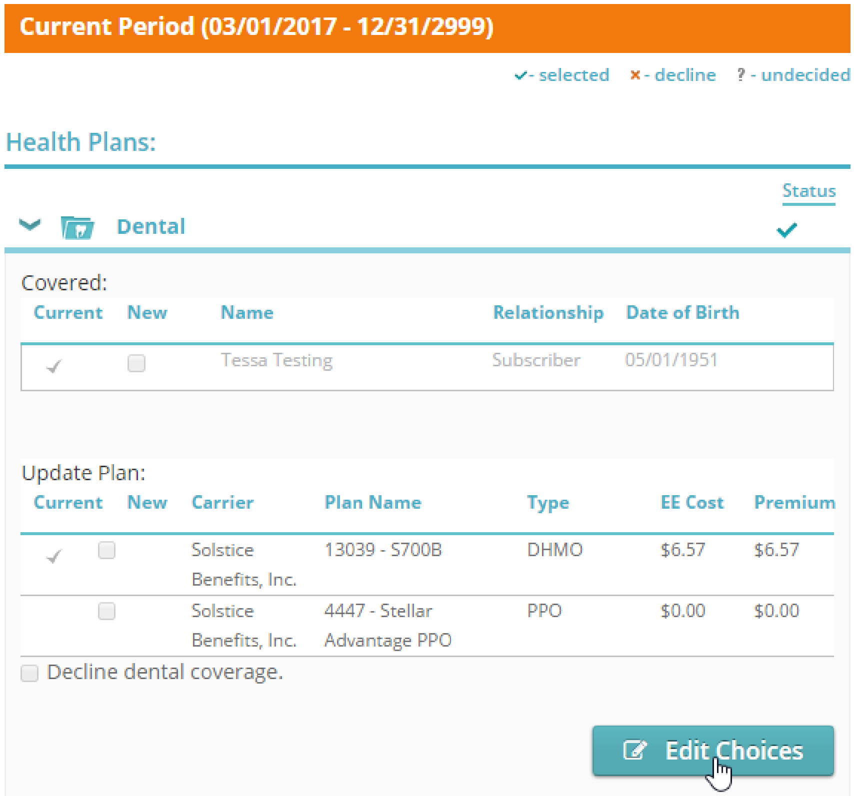


9. Then, change the **Enrollment Due Date** to today's date.

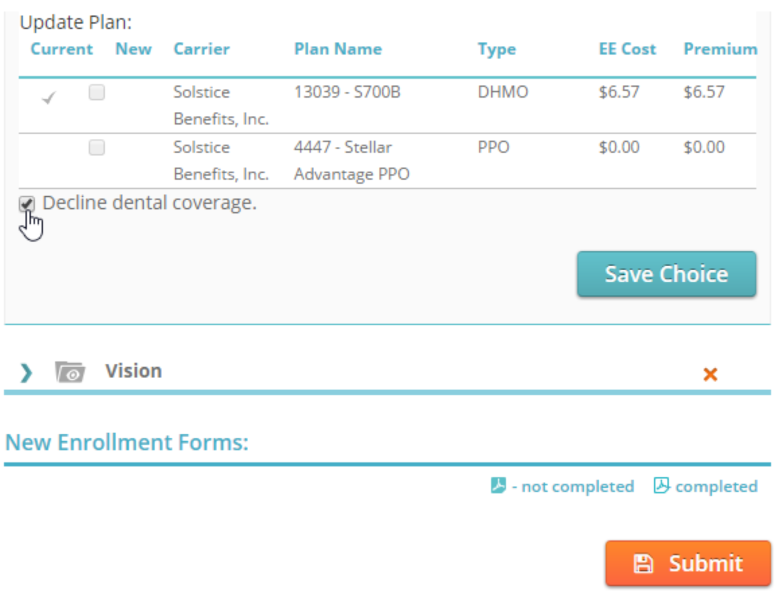


10. After that, select **Save Dates.**

11. Scroll down and select **Edit Choices**.



12. Click into the **Decline coverage** checkbox and then **Save Choice.**



13. Then finally, hit **Submit** to complete the process of removing an employee's benefits. You are done!

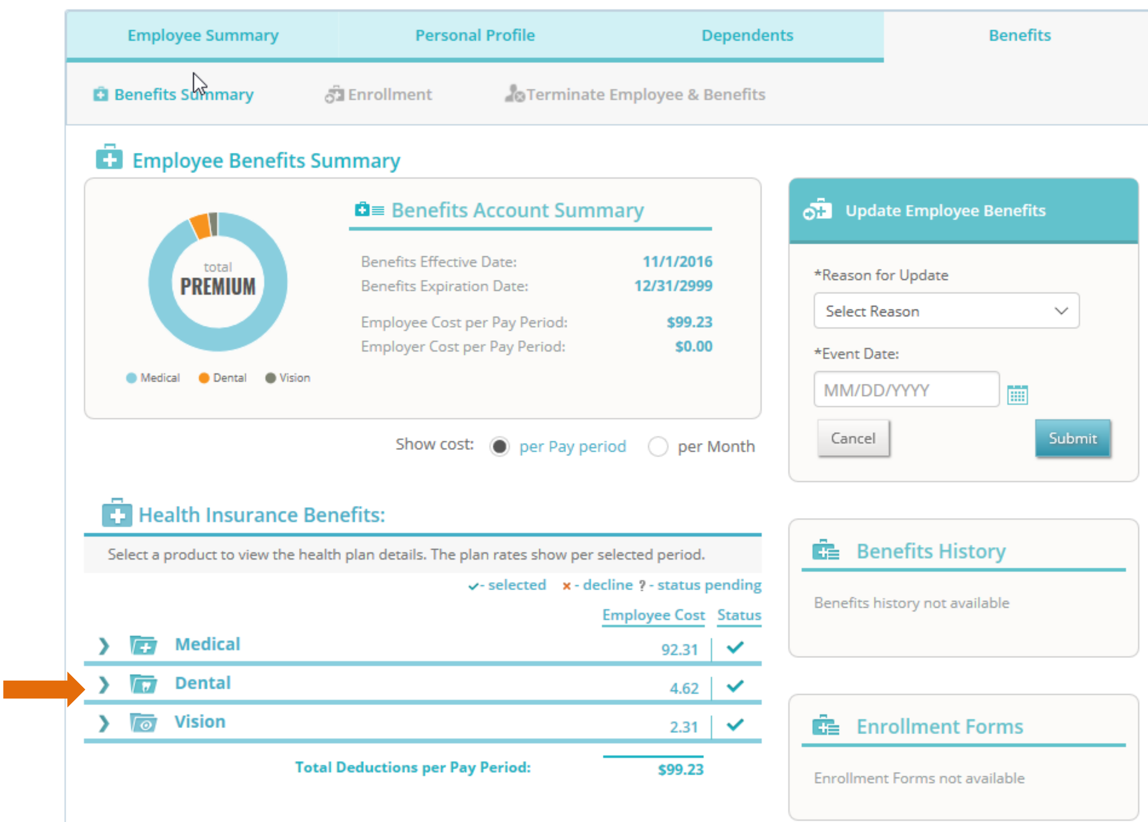
Remove Dependent Benefits Due to Qualifying Event

Another task that you perform throughout the year is removing the benefits of a dependent who is no longer eligible for coverage. To do so, follow these steps:

First, find the employee of the dependent. You can simply type in the employee's name into the top search panel, enter his or her DOB, or member number.

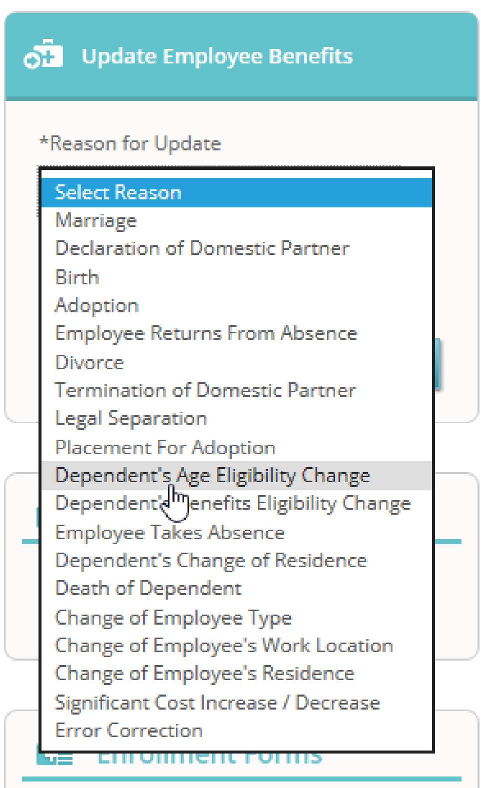
Once you have entered his or her name, click on the briefcase icon and this will take you to the **Benefits Summary** page.

This will take you to the **Benefits Summary** page. On the main panel, you will see the employee's benefits account summary and on the lower half, you can see which benefits the member has.



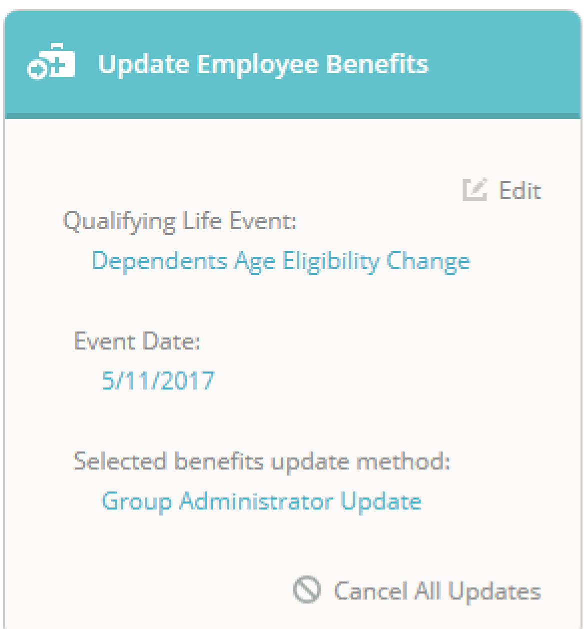
4. Click on the arrow right before **Dental,** and it will expand and show the dependents covered under the dental plan.

5. Then to the right, under **Update Employee Benefits**, click into the cell beneath **Reason for Update** and you will be provided with various qualifying events. Select the appropriate event. In this example, we are removing benefits for a dependent child that is no longer eligible, because he or she just turned age 26.

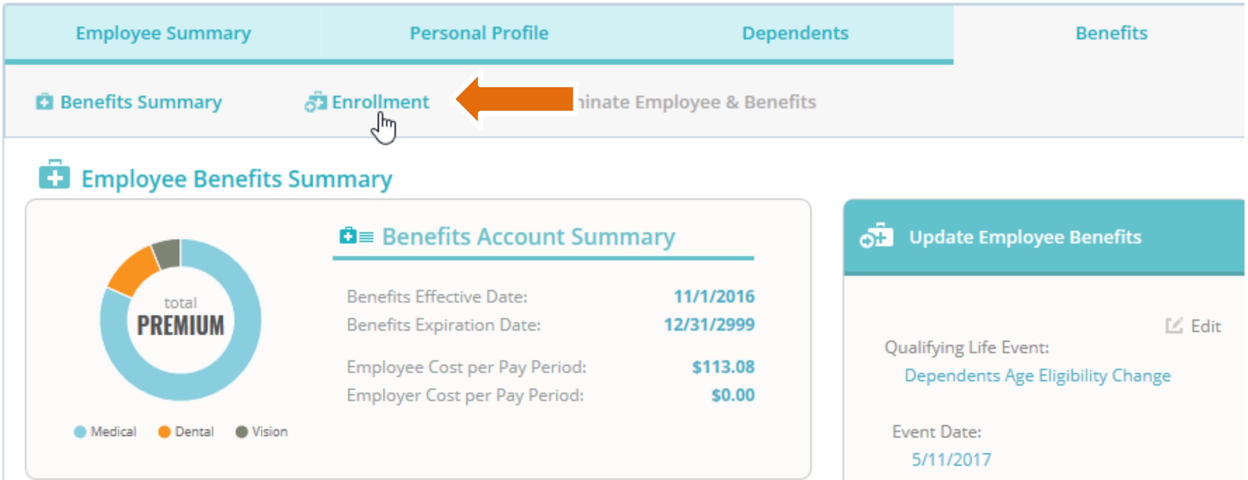


6. Enter today's date into the **Event Date** cell and click **Submit**.

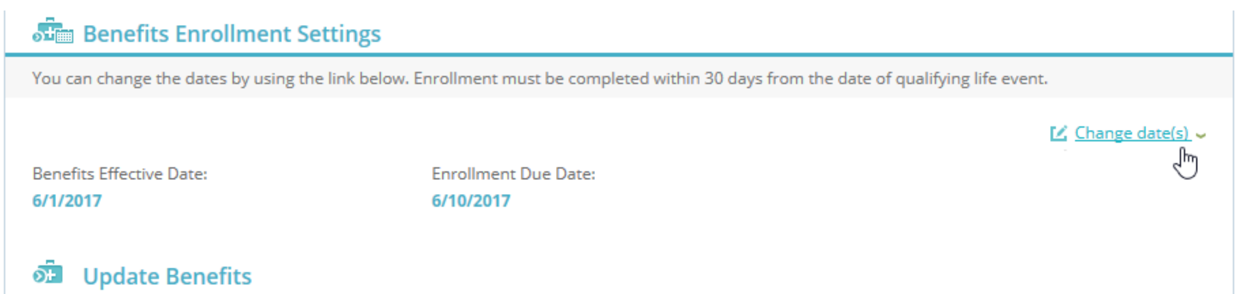
7. The **Update Employee Benefits** tab will show that you successfully created a pending event. If you realize you made a mistake, you can still **Edit** or **Cancel All Updates** by double clicking on the appropriate option.



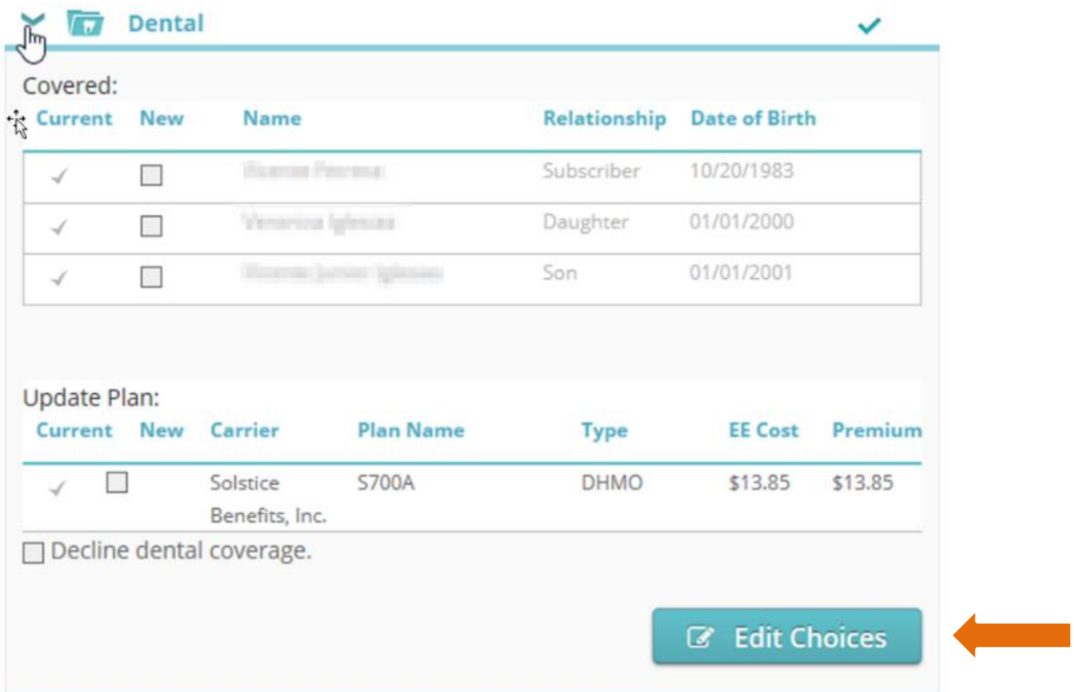
8. To proceed with the change, click on **Enrollment**.



From here, you will be able to update benefits. You will see that the **Benefits Effective Date** is the first of the following month, the default. If you want to change this, you may do so by selecting the **Change dates** link to the right.



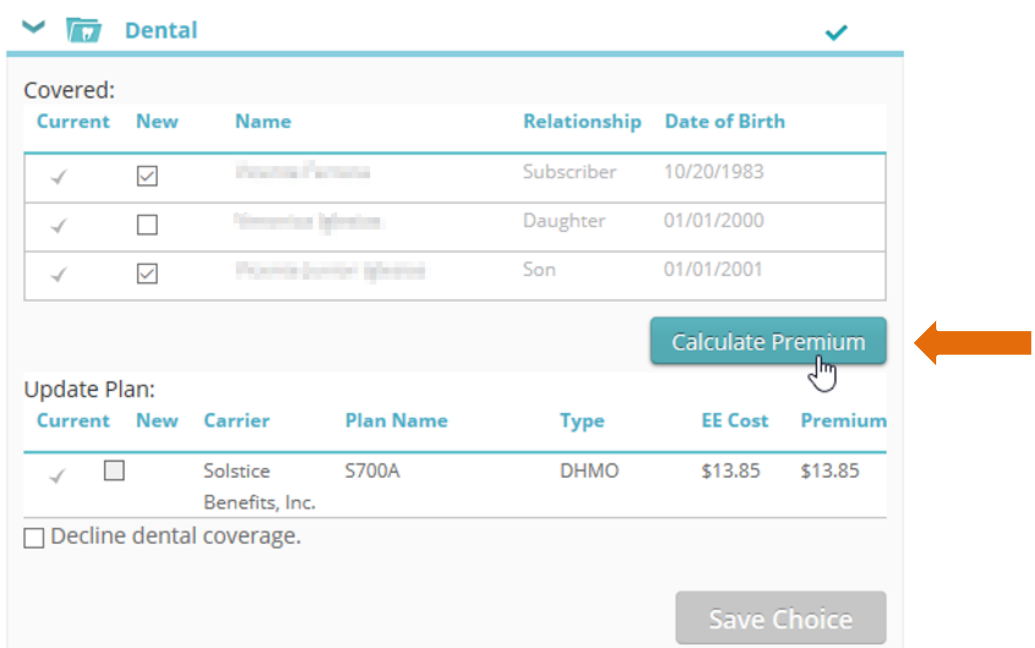
9. Once you have the dates locked in, navigate down the page and click on the drop-down arrow by the appropriate benefit – **Dental** in this case.



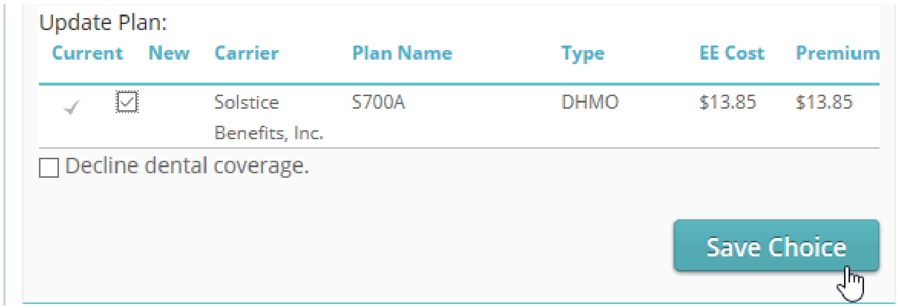
10. Then click on **Edit Choices**.

11. Select all the members that **<u>will remain</u>** on the plan, by clicking on the appropriate checkboxes.

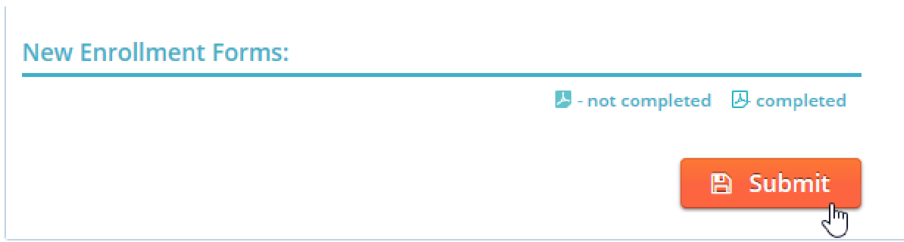
12. Afterwards, click on the **Calculate Premium** button.



13. Right below that, select the dental plan you want the selected members to have, and then **Save Choice.**



14. Finally, **Submit** your changes.



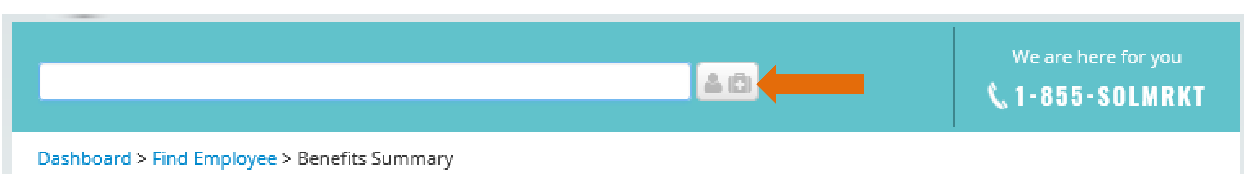
Update Employee Profile

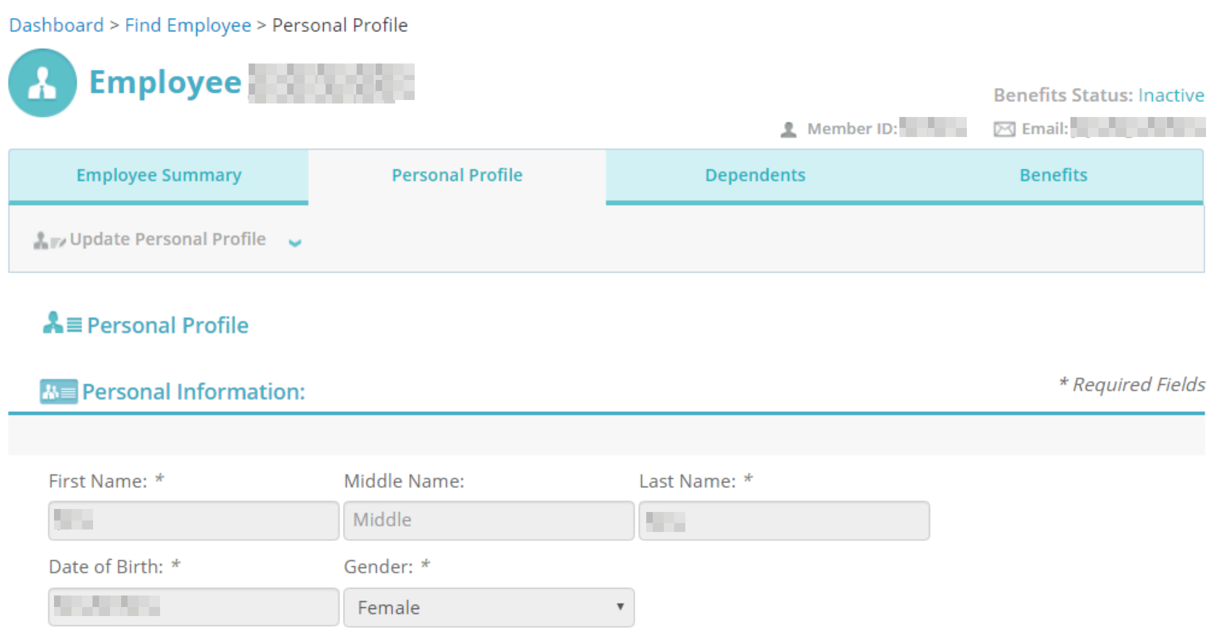
Things change all the time. Addresses. Email addresses. Phone numbers. Your benefits portal allows you to quickly make these changes for your employees and get to the other things you have to do. To update an employee's profile, do the following:

1. Click on the home icon to go back to the **Benefits Administration** Dashboard.

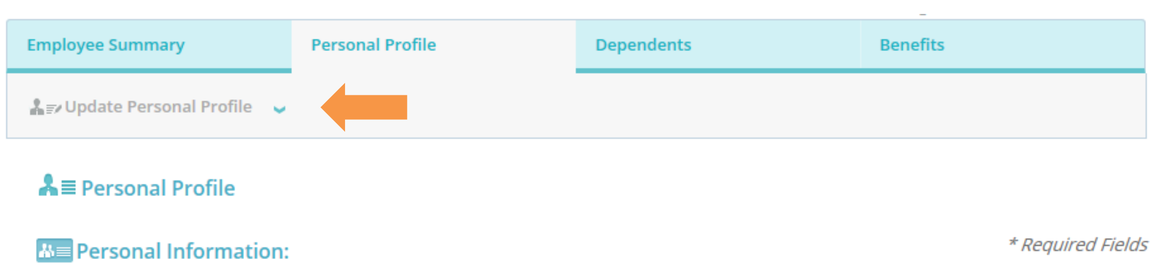
First, find the employee of the dependent. You can simply type in the employee's name into the top search panel, enter his or her DOB, or member number.

There are two action icons ( ) to the right of each employee's record. Select this icon ( ) to update the employee's personal profile. This will take you to the **Personal Profile** Page.

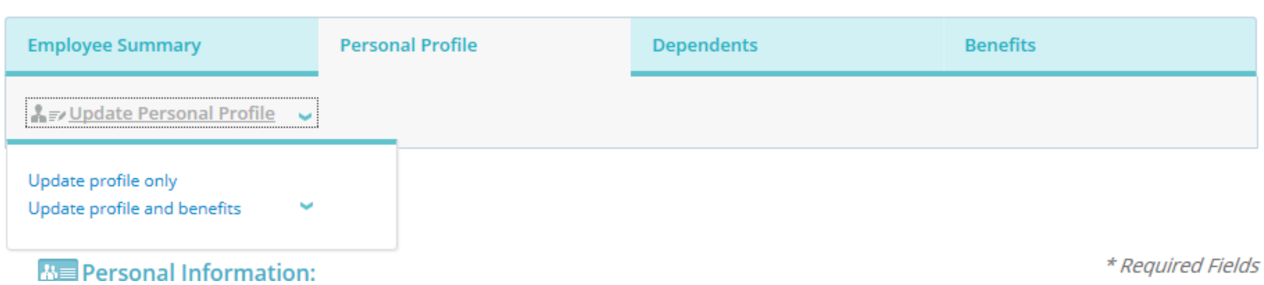




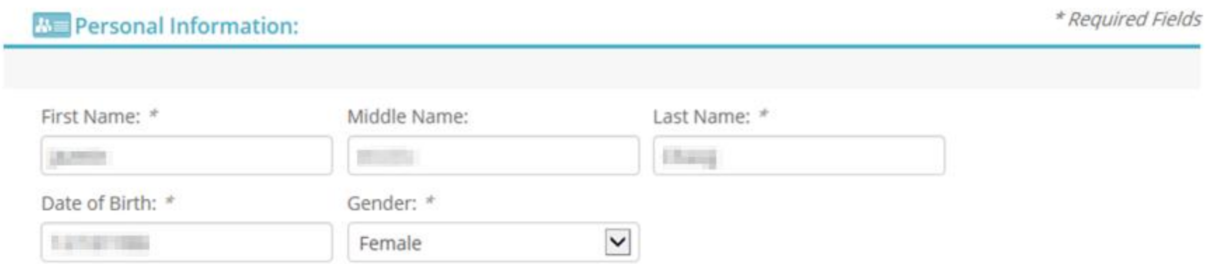
4. Right below the column titled, **Employee Summary**, you will see **Update Personal Profile**. Click on the drop-down arrow to view your options.



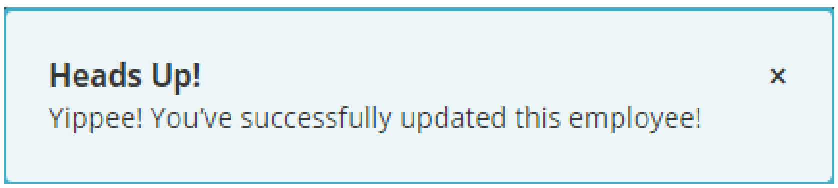
5. You will see two options. Please select **Update profile only.**



Once you've selected this option, the page will become fill-able, allowing you to edit the employee's information, as seen on page 42.



6. Make the necessary changes and select **Save Profile**. You will know that your update was successful because you will see the following:

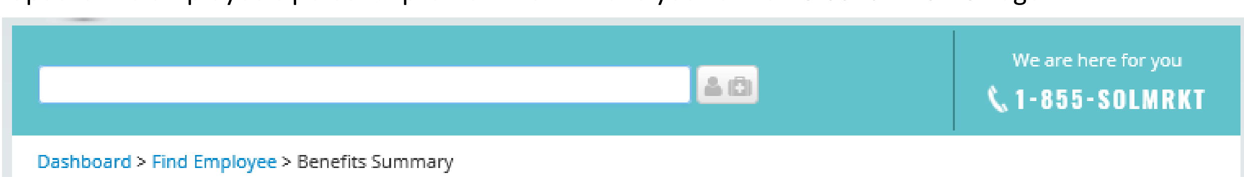


Update an Employee's Dependent Profile

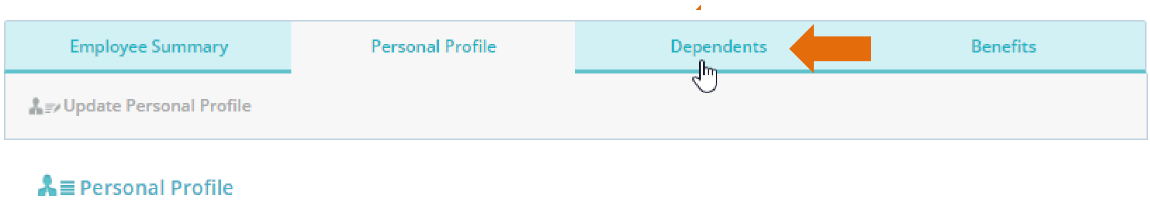
What if a dependent's information changes? How do you update that? Quick and easy. Follow these steps:
1. Click on the home icon to go back to the **Benefits Administration** Dashboard.

First, find the employee of the dependent. You can simply type in the employee's name into the top search panel, enter his or her DOB, or member number.

There are two action icons ( ) to the right of each employee's record. Select this icon ( ) to update the employee's personal profile. This will take you to the **Personal Profile** Page.

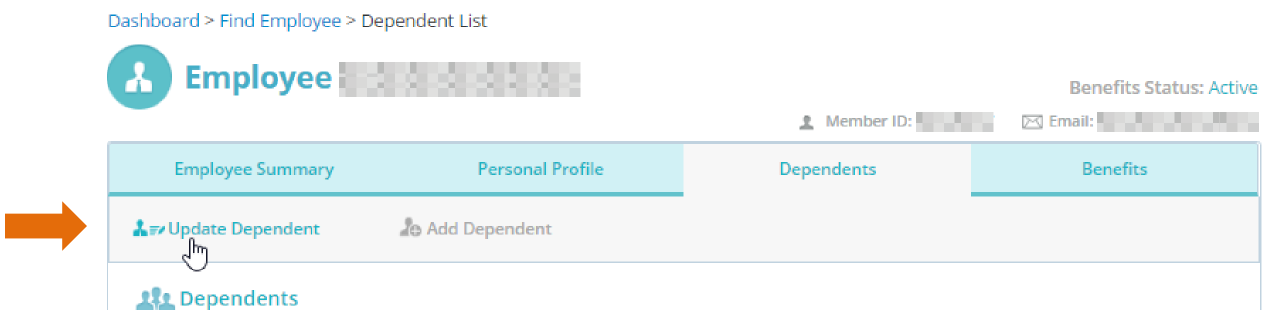


3. Once you get to the **Employee Profile** page, click on **Dependent.**

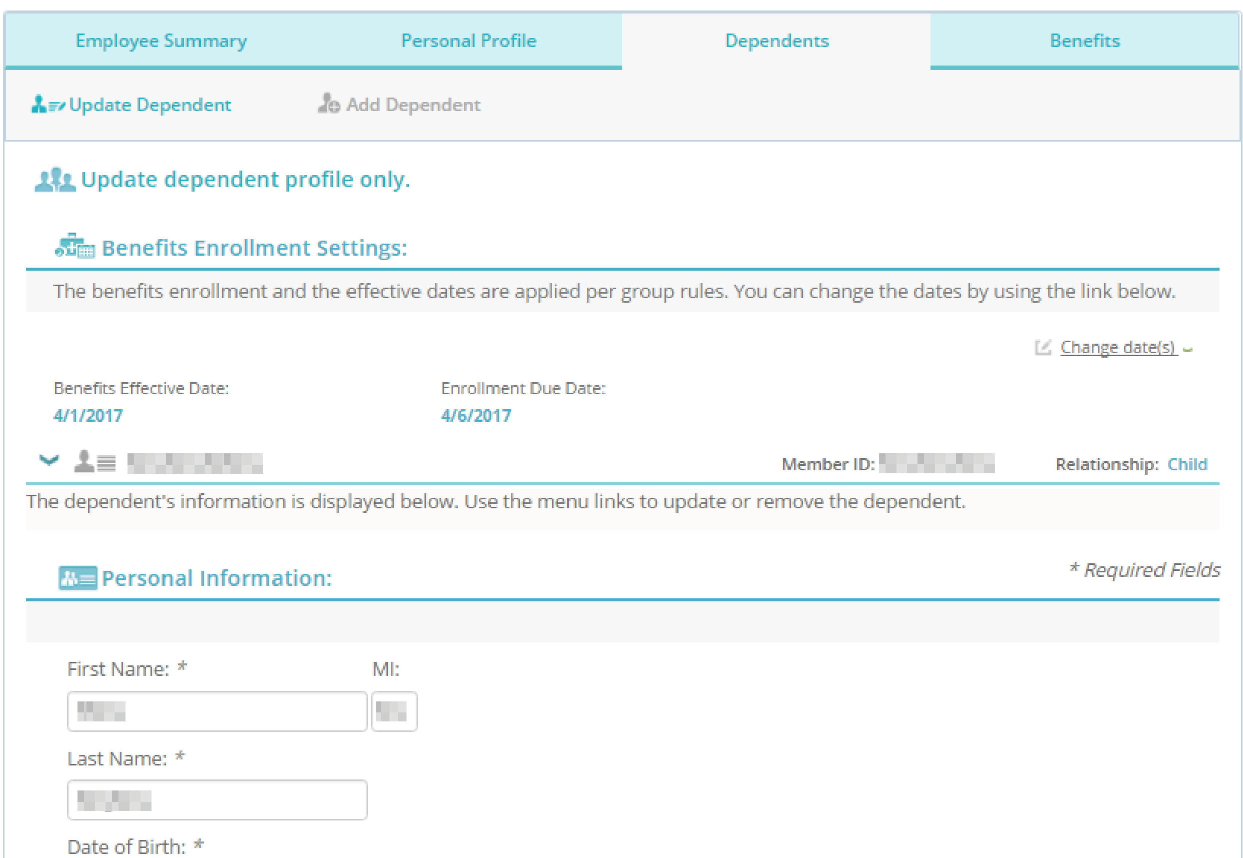


Right below that ribbon, you will see the option to **Update** or **Add** more dependents.

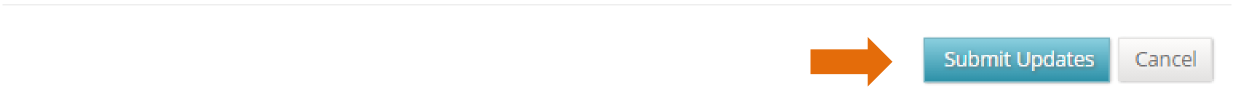
4. Click on **Update Dependent.**



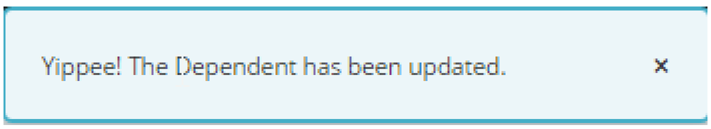
5. Go ahead and make the changes to the dependent's profile in the form that's provided.



6. Then, click **Submit Updates.**



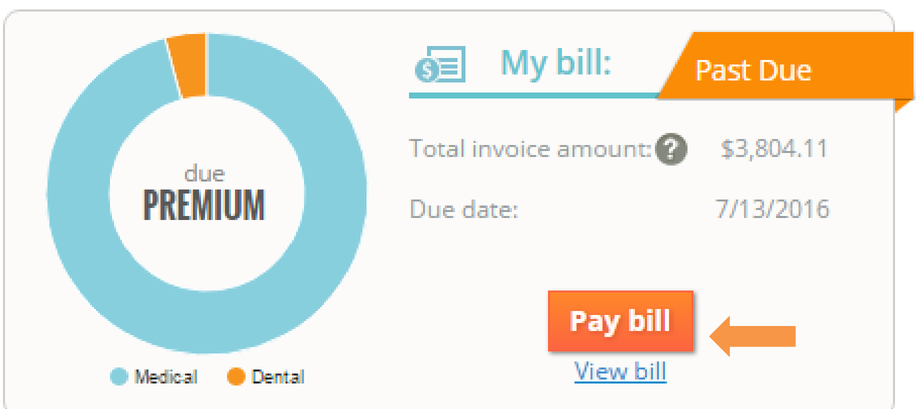
You'll see this confirmation, letting you know the dependent's information was updated.



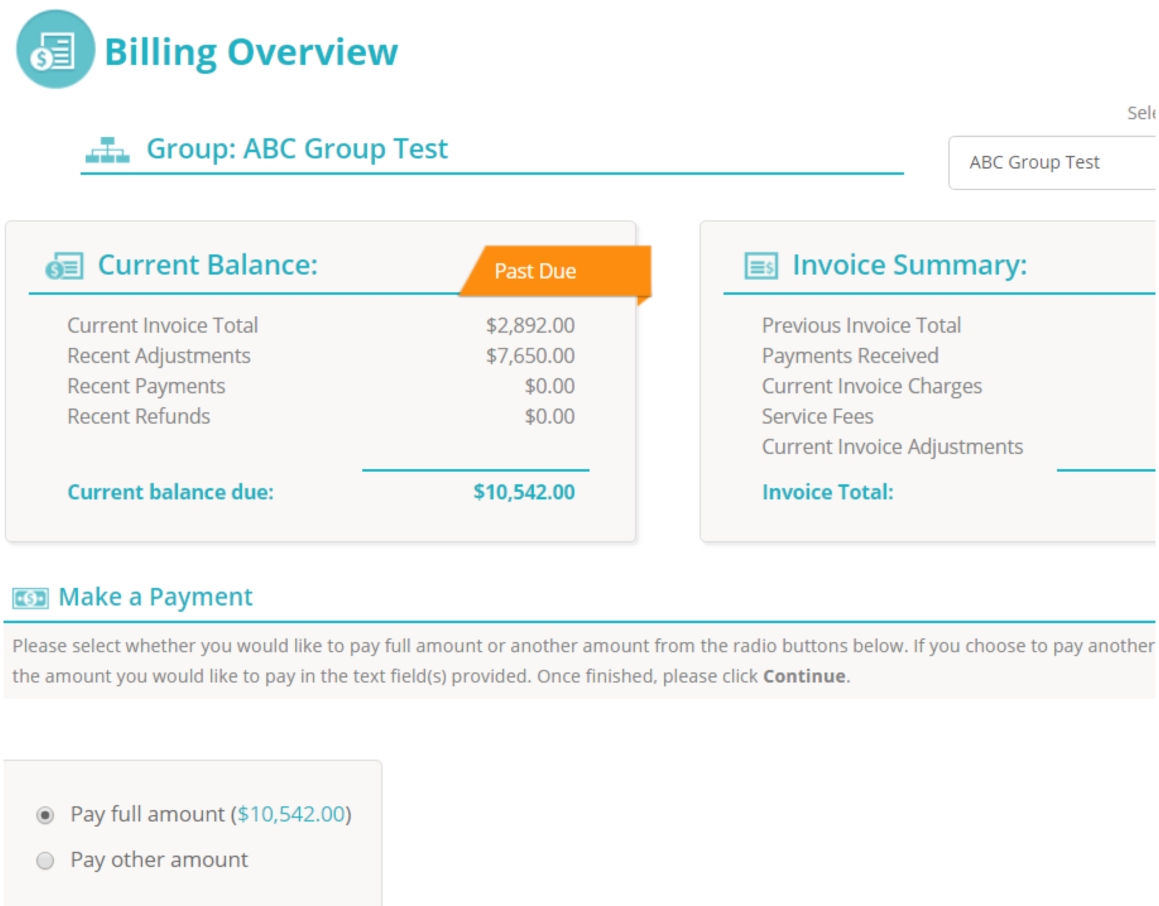
Pay Bill

Paying your bill has never been easier!

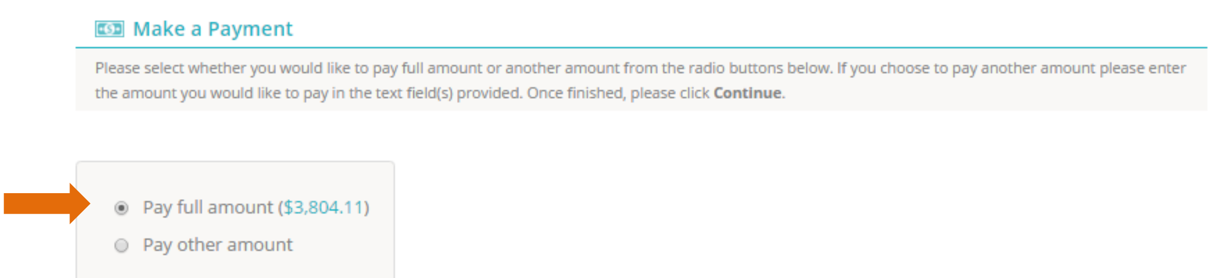
1. From your Dashboard, click on **Pay Bill**.



This will take you to the **Billing Overview** page where you can see your **Current Balance** (left) and **Invoice Summary** (right) as seen on page 45.

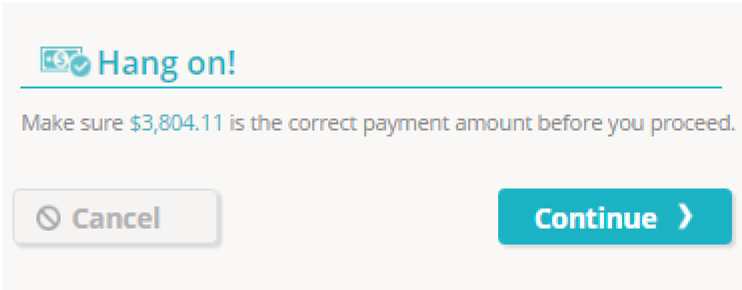


Paying the full amount ensures that you start each month fresh, and only pay the balance incurred for that month. Paying a portion will result in the balance owed rolling over and being added to the next month's balance. Therefore, it's best to pay the full amount of each invoice.



2. For the purposes of this guide, let's select to pay the full amount. An alert will appear, asking you to check and make sure that the payment amount is correct.

3. If you are sure, click **Continue** again.

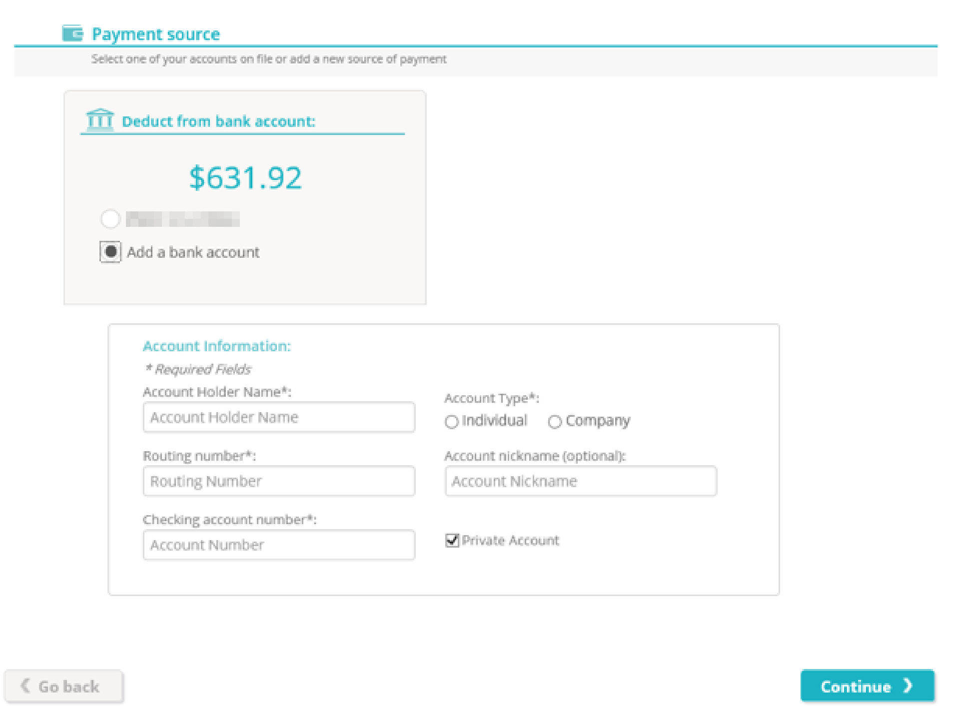


On the new page, you will have three tasks, which will show on the top half of the page:

- Select Payment Source
- Verify & Submit Payment
- Payment Confirmation

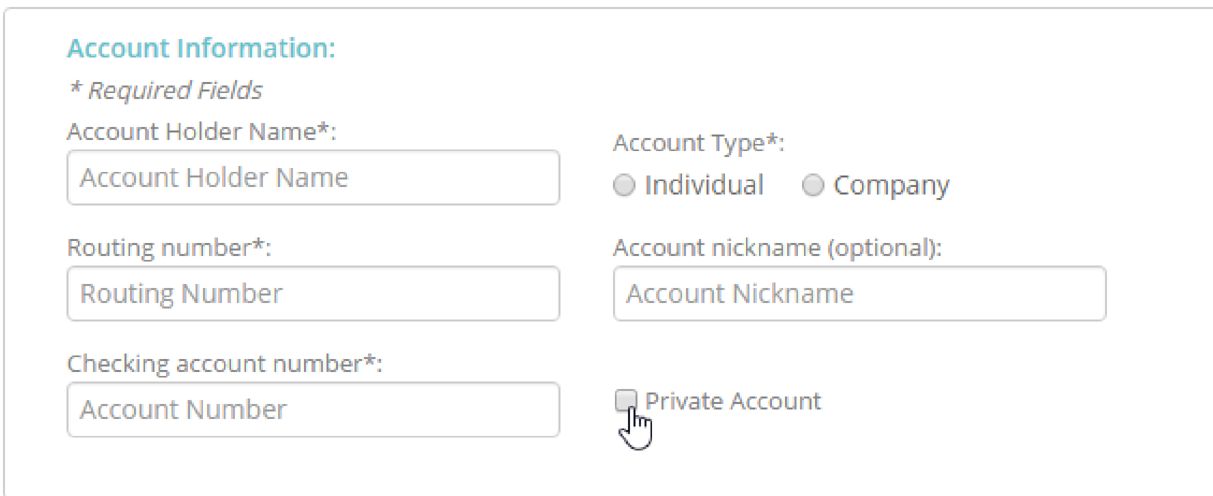
Let's review each step:

A. **Select Payment Source:** Click the checkbox beside the option, **Add a bank account,** and then enter the requested information into the fields of the available form.



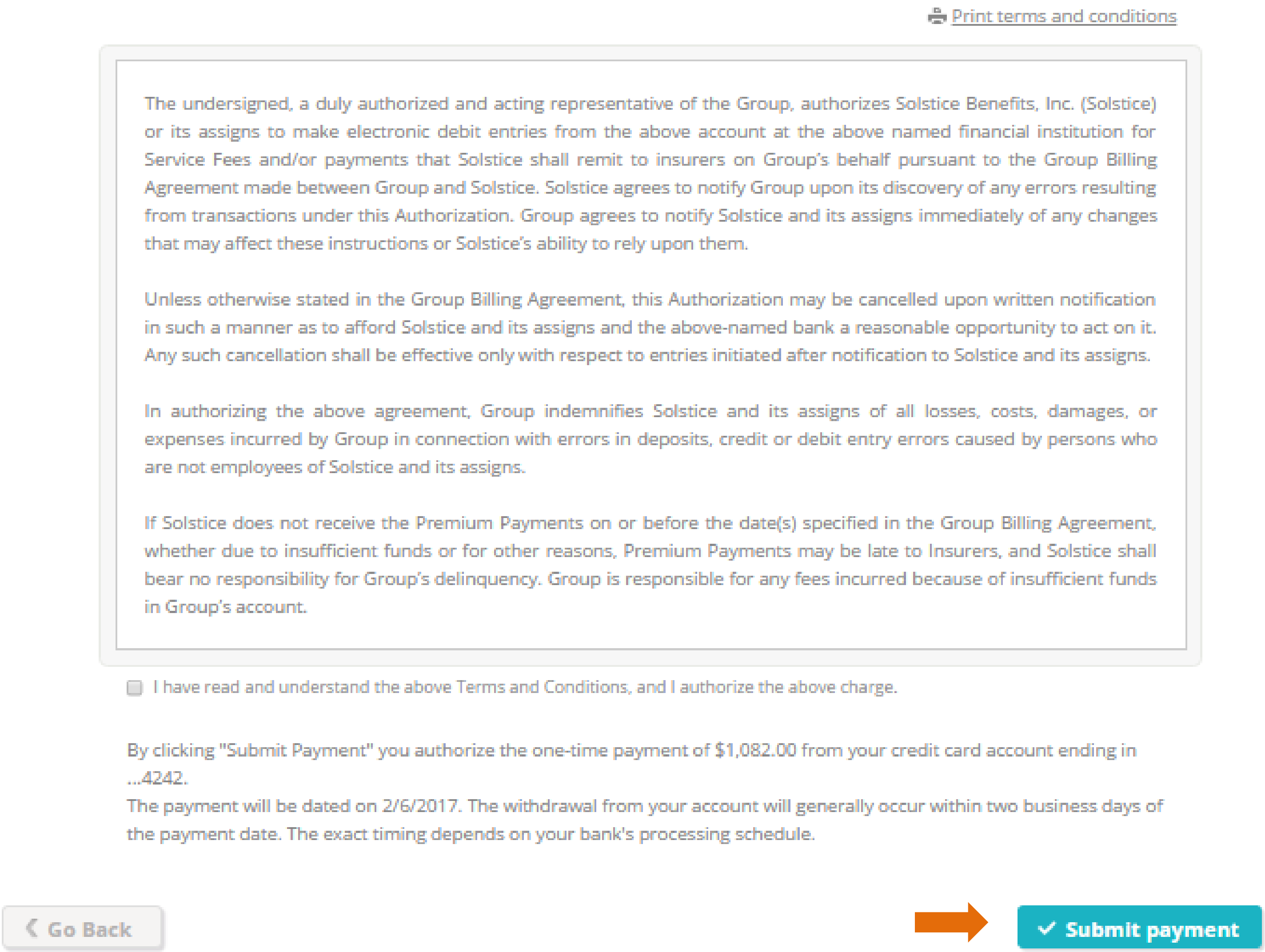
Note: To ensure that you are always on time with your payments, once you have entered your bank information, you may contact your eligibility and billing coordinator and they can enroll you in autopay. This convenient feature allows you to make recurring, automatic monthly payments, without having to log into your account, or remember to send a check.

Click in the checkbox before **Private Account** to ensure that the bank account information you entered is visible only to you. Leave this unchecked if it you would like for it to also be visible to the other members of your benefits staff.



5. **Verify & Submit Payment:** Now that you've entered your payment information, your benefits portal will display it, as shown below. Review and verify the payment information you entered.

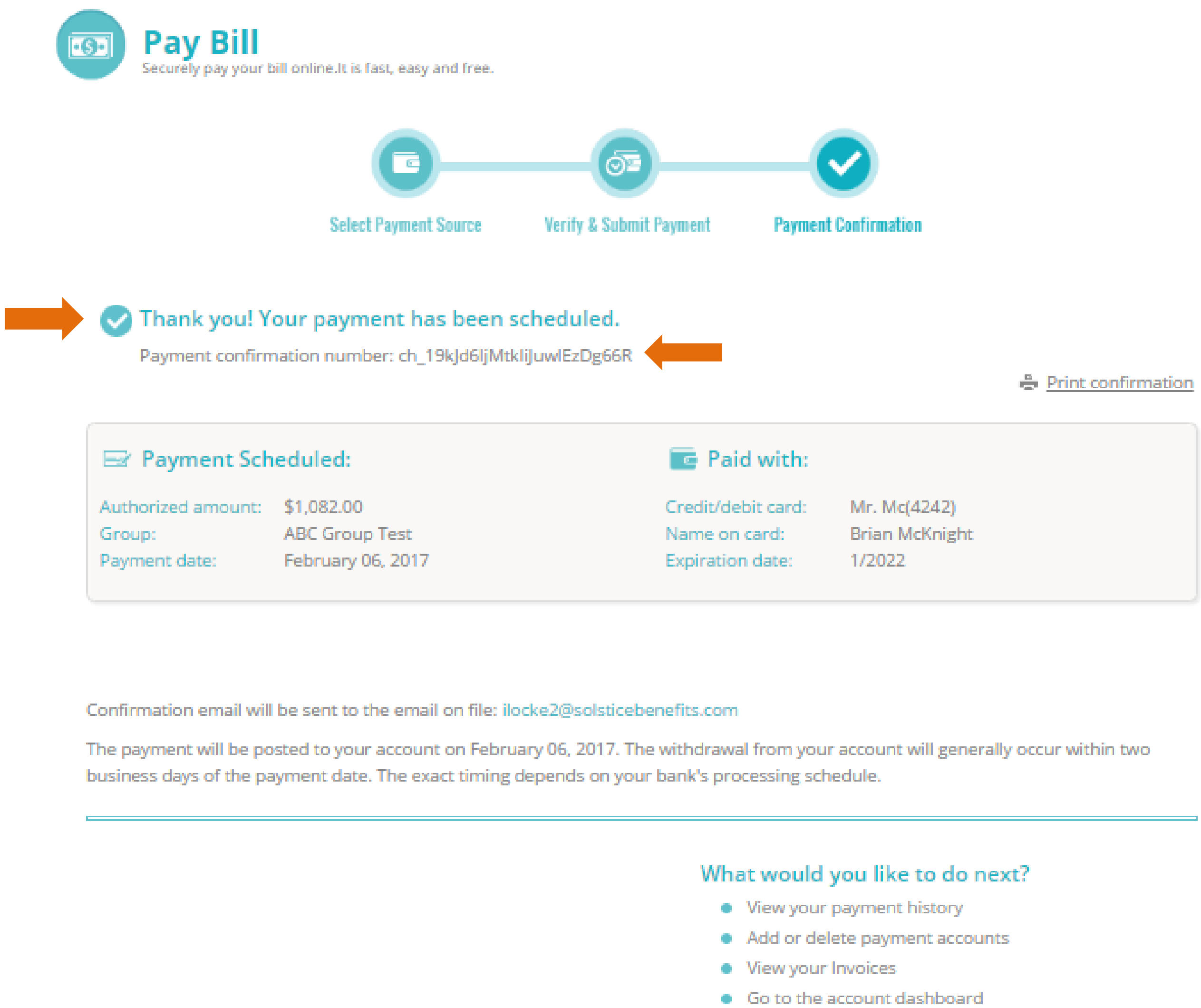
6. If it’s correct, then, review the **Terms and Conditions** and click the checkbox, which indicates that you’ve read, understood and agree to the terms and conditions. Clicking the checkbox also means you are authorizing the payment. And that’s it. You’re finished!



7. Once this is done, then go ahead and **Submit Payment.**

8**. Payment Confirmation**: Now you're at Payment Confirmation, the last portion of the **Pay Bill** process.

After you click to **Submit Payment**, you will see confirmation that your payment was scheduled (below), along with an alpha-numeric payment confirmation number, and the option to print your confirmation. Additionally, an email confirmation will be sent to the email address that's listed on the account.

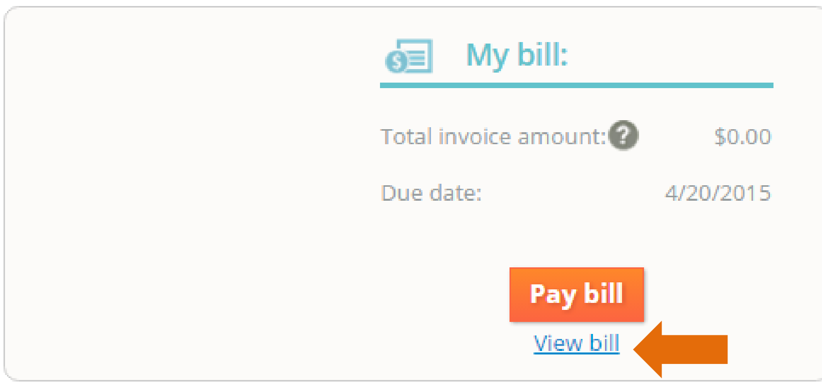


Access and Filter Invoice Report

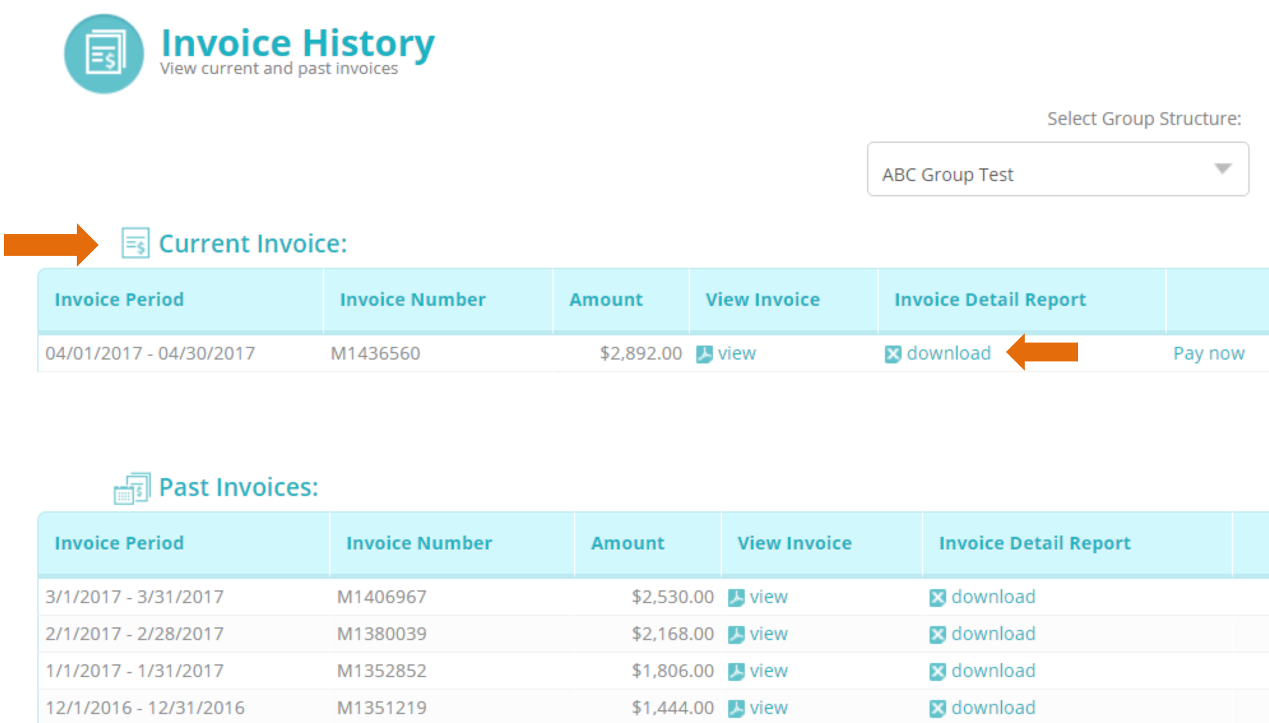
Based on feedback we received from our clients, we also provide our monthly invoice in a downloadable Excel file called an Invoice Detail Report. Here are some guidelines on how to access and filter the report so you capture exactly what you are looking for:

How to Access the Invoice Detail Report

1. From your dashboard**, c**lick on **View Bill.**



2. Under the section titled **Current Invoice** under **Invoice Detail Report**, click *download* to view and analyze your monthly invoice in Excel.



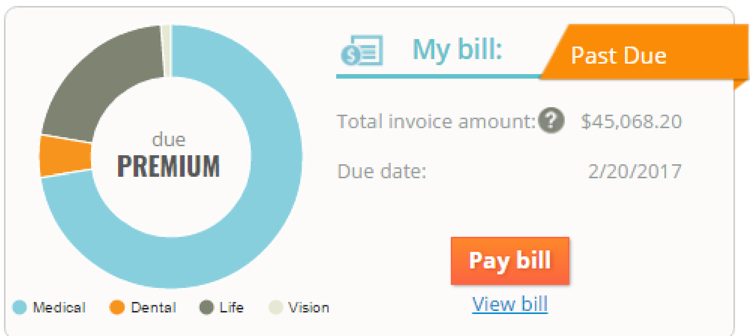
Invoice Period	Invoice Number	Amount	View Invoice	Invoice Detail Report	
04/01/2017 - 04/30/2017	M1436560	$2,892.00	view	download	Pay now

Invoice Period	Invoice Number	Amount	View Invoice	Invoice Detail Report
3/1/2017 - 3/31/2017	M1406967	$2,530.00	view	download
2/1/2017 - 2/28/2017	M1380039	$2,168.00	view	download
1/1/2017 - 1/31/2017	M1352852	$1,806.00	view	download
12/1/2016 - 12/31/2016	M1351219	$1,444.00	view	download

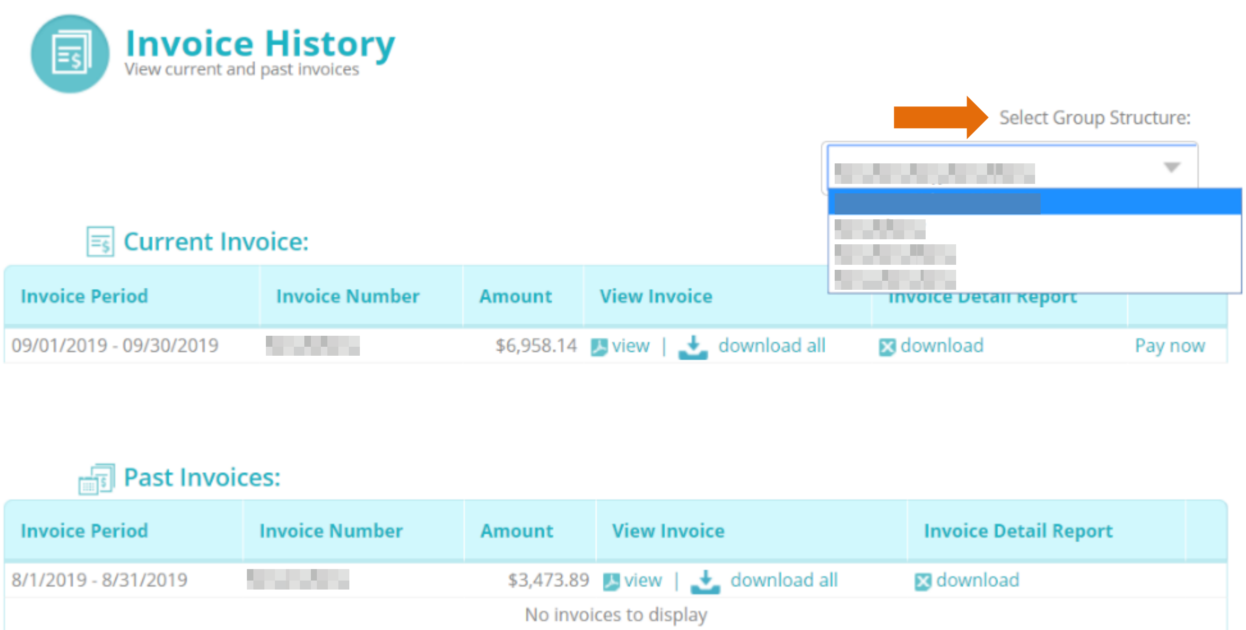
View invoices by group division

If your company is set-up to bill-by-division, here are a few steps to access invoices for specific divisions of your organization.

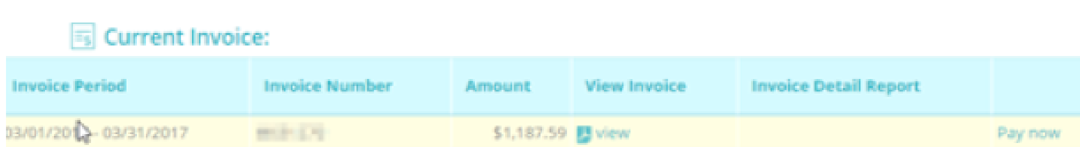
1. From your dashboard, select **View bill.**



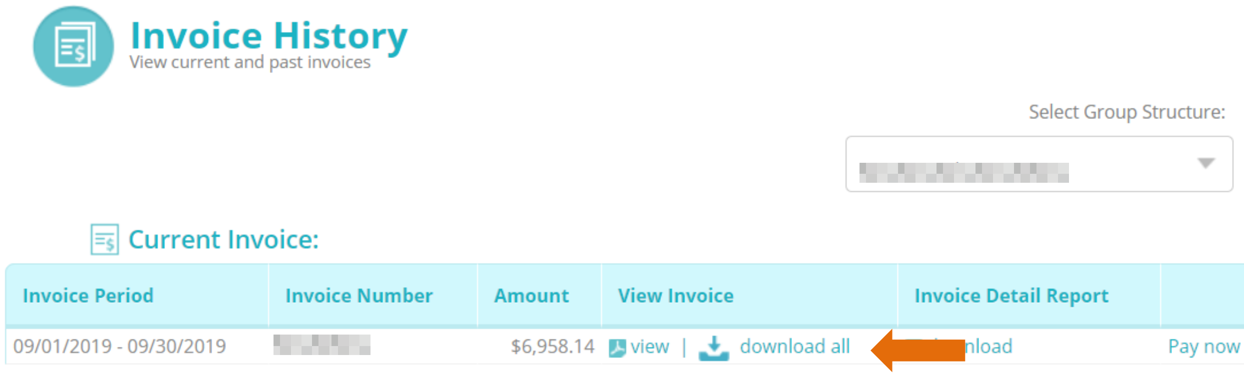
2. This will take you immediately to the **Invoice History** page, where current and past invoices associated with your Master Group will be displayed.



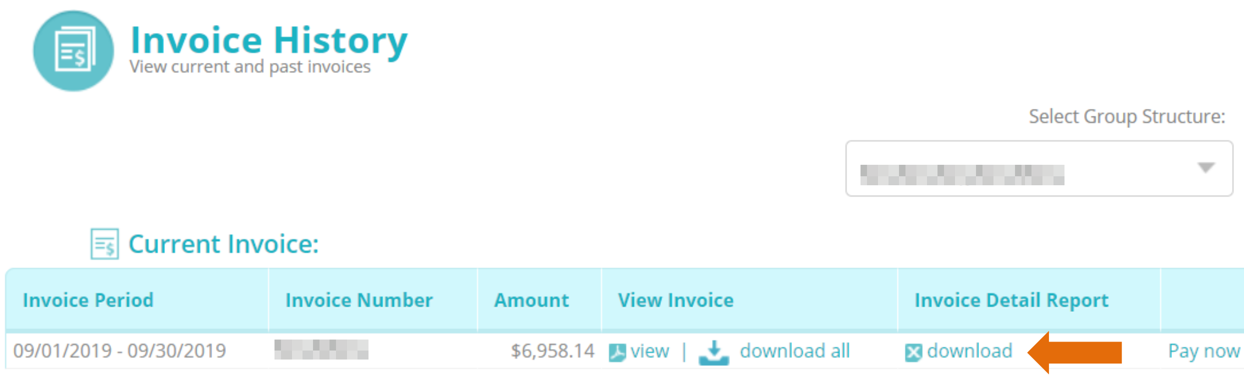
3. Click on the box right below the section titled, **Select Group Structure**; this will provide you with a drop-down menu of all the divisions associated with your group.
4. Click on the appropriate division; the system will show you the **invoice period, invoice number, amount** owed and allow you to see the invoice for that specific division.



5. You also have the option of downloading all the division invoices as a batch ZIP file rather than downloading them individually. Click on the download all link and you will be prompted to save the batch file of all invoices generated for the month.



6. If you would prefer, download an Excel version of your invoice by clicking on the link for the Invoice Detail Report. The Excel version gives you access to more detailed information including enrolled dependents, coverage tiers and divisions.



Now that you have the tools you need to make your job simpler, go ahead and dive in!

Have questions or concerns? Please contact your Solstice billing and eligibility coordinator or your account manager. We're happy to help you!