Group Administrator Portal

(GAP) USER GUIDE

June 2023

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Introduction

We are committed to working with our customers to ensure we are providing you with the best tools, resources, and services to manage your accounts with Saskatchewan Blue Cross.

As our world's technology continues to evolve, we are committed to making ongoing enhancements to provide you with the most efficient, flexible, and user-friendly services.

As part of this evolution, we've updated our Group Administrator Portal to make it easier for you to input time and access information.

Your feedback drives our continuous improvement. If at any time, if you have questions or comments about your user experience, please contact your Saskatchewan Blue Cross representative. As always, we look forward to supporting you.

Logging In

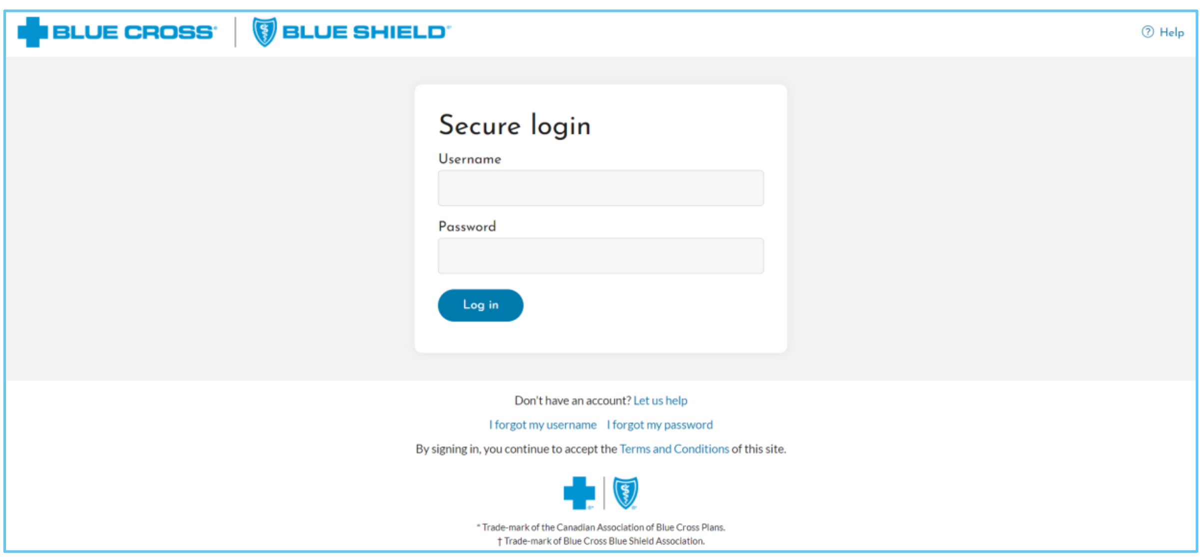
- Go to www.sk.bluecross.ca
- Click **Login** on the navy toolbar
- Under Login, click on **Group Administrator Portal**
- Enter your User ID and password.
  - » If you are a new Group Administrator, your User ID was sent to you in a separate email from no_reply@bluecross.ca.
  - » Your temporary password was sent to you in an email from no_reply@bluecross.ca
- Click Login.

New Group Administrators

If you are a new Group Administrator, you will need to:

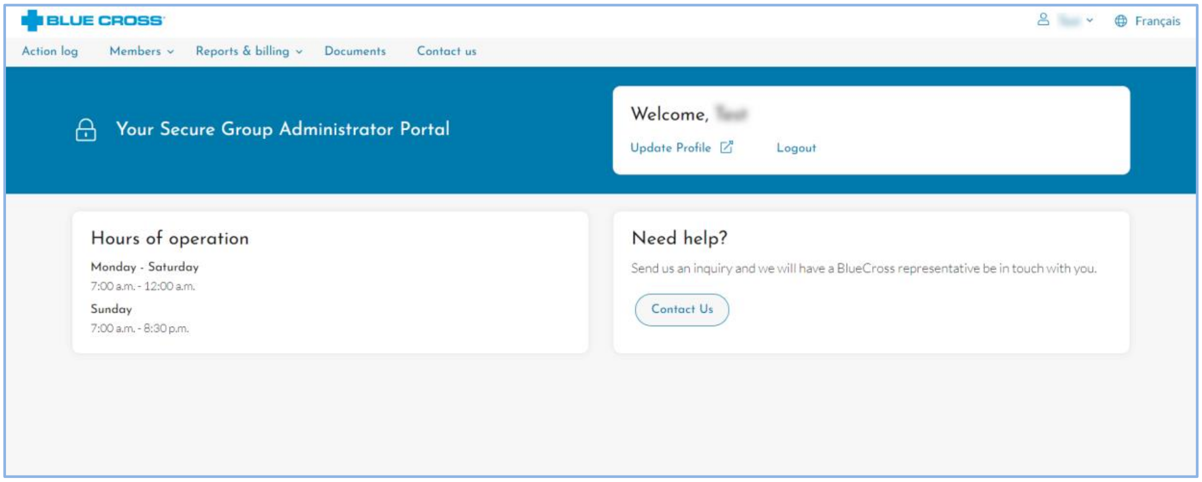
- Change your password.
  - » Select a new password following the criteria provided.
  - » Click Submit.
  - » A confirmation will appear to confirm the password change.
- Accept the Terms & Conditions.
- Set up challenge questions.
  - » This will allow you to reset your password in the future, if necessary.

Forgot your Password? Enter your Username and select the “I forgot my password” link. You will then be prompted to answer the challenge questions you set up during your initial login.



Main Navigation Menu

After logging in, you will be presented with the following screen:



Unavailable Functions

Please note that the following functions are unavailable in the portal:

- Updating any other section than Request Card, Employee Information and Coordination of Benefits for a member on a disability claim.
- Add a dependent to a member on a disability claim.
- Add or maintain contingent beneficiaries
- Update Personal Wellness Account

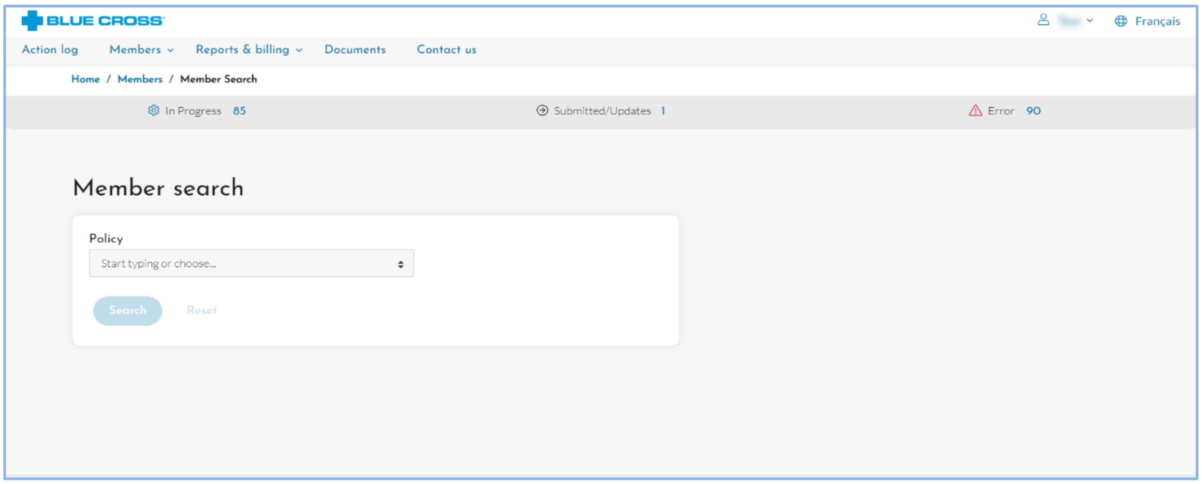
If you require any of these changes to be made, please contact your representative at Saskatchewan Blue Cross.

Enrolment

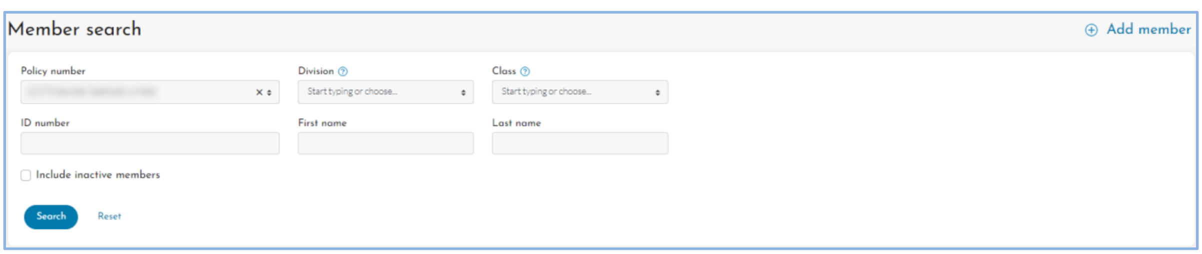
Finding an Employee who Already has Benefits

To find an employee with benefits:

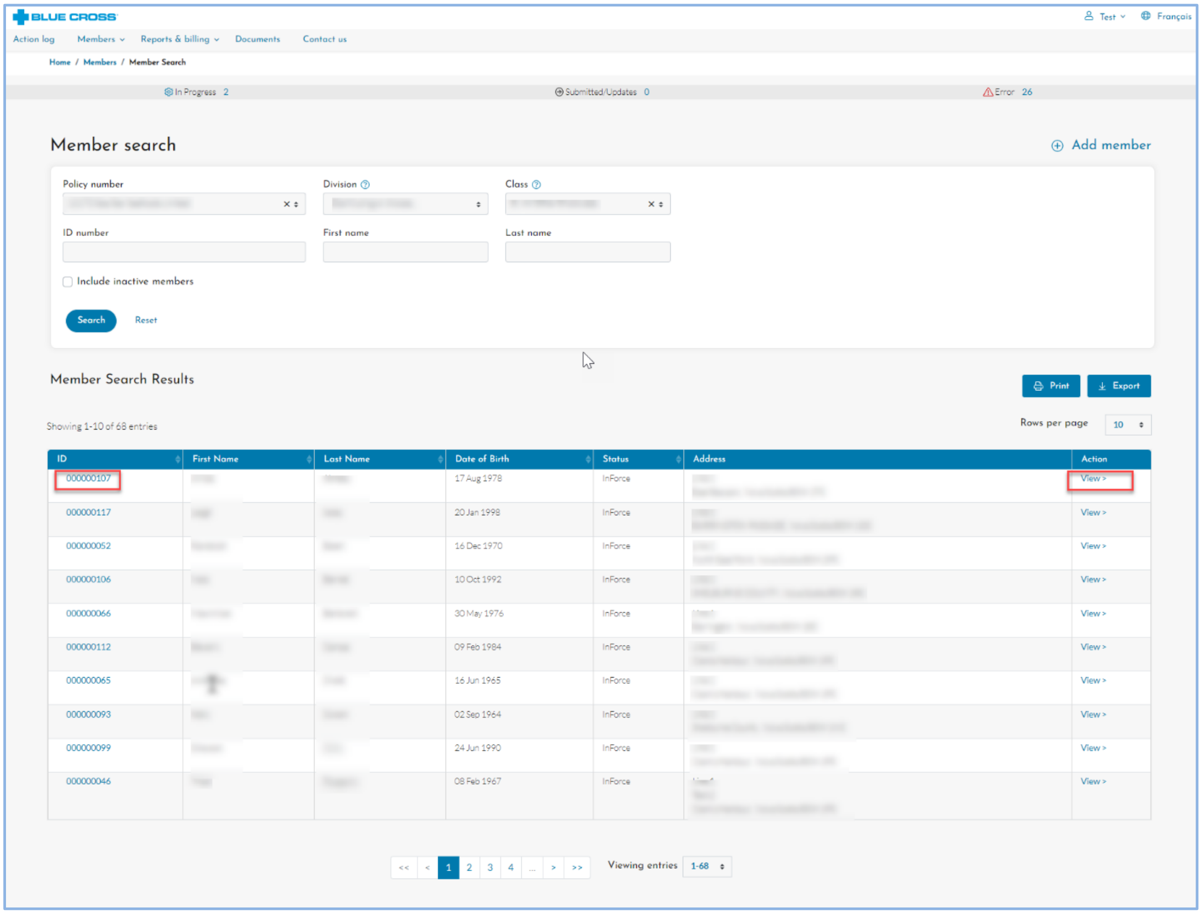
- Under **Members,** choose **Member Search.**
- From the **Member Search** screen, input the Policy Number

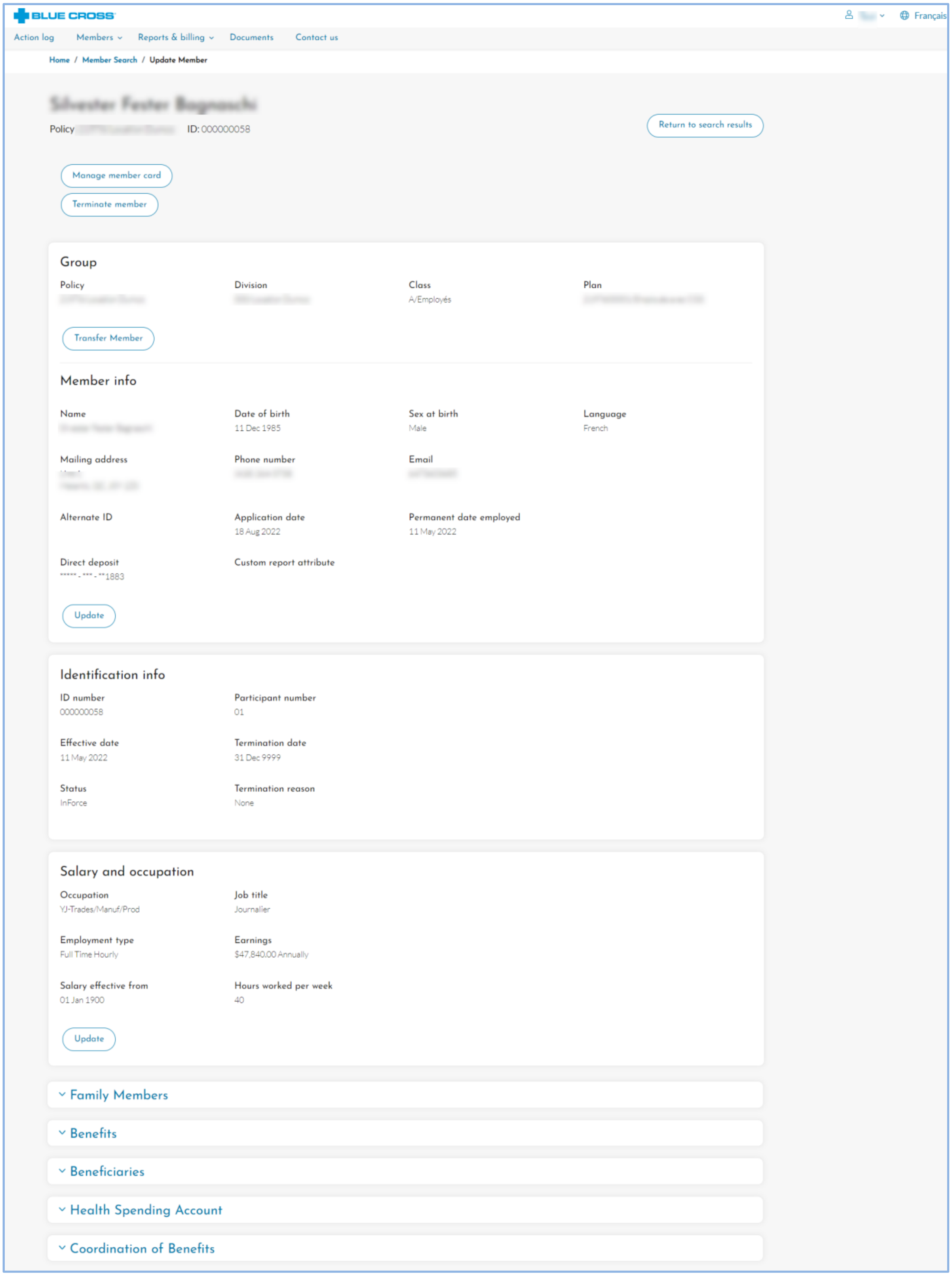


- You can then search for an employee by **First Name, Last Name** or **ID Number**.
- You can view specific groups of employees by searching for the **Policy**, **Division** and **Class**.
- To view inactive employees, check **Include inactive members**



- To view an employee's summary information, click on their **ID number** or click on **View**. The summary information for that employee will appear.


BLUE CROSS
Test
Français
Action log
Members
Reports & billing
Documents
Contact us
Home / Members / Member Search
In Progress 2
Submitted/Updates 0
Error 26
Member search
Add member
Policy number
Division
Class
ID number
First name
Last name
Include inactive members
Search
Reset
Member Search Results
Print
Export
Showing 1-10 of 68 entries
Rows per page 10
ID
First Name
Last Name
Date of Birth
Status
Address
Action
000000107 17 Aug 1978 InForce View >
000000117 20 Jan 1998 InForce View >
000000052 16 Dec 1970 InForce View >
000000106 10 Oct 1992 InForce View >
000000066 30 May 1976 InForce View >
000000112 09 Feb 1984 InForce View >
000000065 16 Jun 1965 InForce View >
000000093 02 Sep 1964 InForce View >
000000099 24 Jun 1990 InForce View >
000000046 08 Feb 1967 InForce View >
1 2 3 4
Viewing entries 1-68



- On the Member summary page above you will see some sections that can be expanded to view more information: Family Members, Benefits, Beneficiaries, Health Spending

Account and Coordination of benefits. If a policy has Personal Wellness Account, an expandable section would be displayed as well.

- For policies that have physical cards The **Manage member card** button allows you to go save or print the information on the card by clicking **Print Card** or to **Request Card** according to a desired date.
- For policies that have digital cards **The Manage member card** button allows you to go save or print the information on the card by clicking **Print** or to **Send** a **Card Notification** according to a desired date by clicking the **Schedule** button.

- If the function is available, **Update** buttons will display at the bottom of the specific sections of information. Click the **Update** button to change the information in that section. Effective dates are based on the applicable grace period that applies to policy/division/class.

- The **Transfer Member** button allows the member to be moved to another Plan, Class, Division or Policy.

- The **Terminate Member** button allows the termination of the member's coverage.
- The **Reinstatement** button allows the reinstatement of an employee's coverage from a temporary loss of work within the last 6 months, or 12 months if he/she had health and dental coverage only.

- The **Action log** tab counts the number of actions that are not yet completed specifically in-progress enrolments and submitted enrolments as well as updates and actions that have provided an error. You can view more details for Actions that are **in progress or in error** by clicking on the hyperlink beside the Action type.
- Completed card requests can also be searched there.

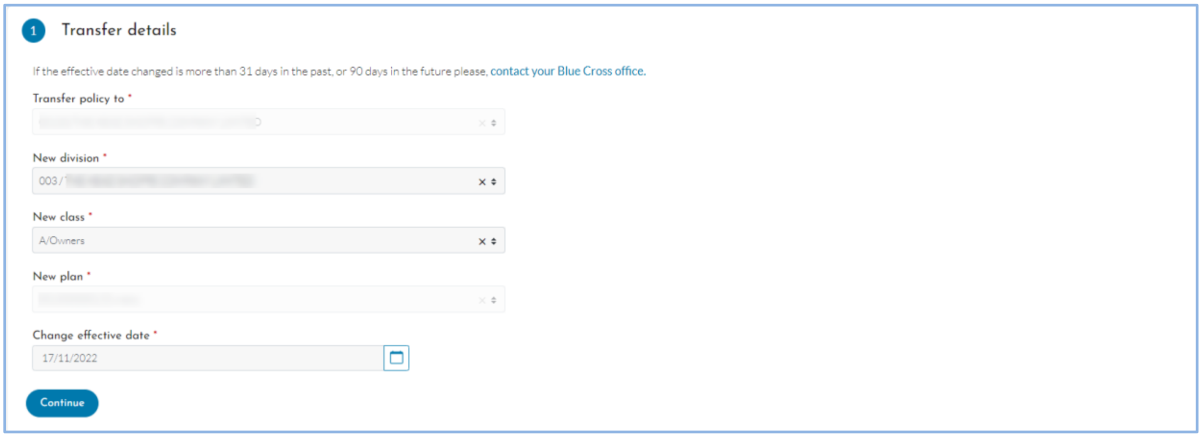
Transferring an Employee

To transfer an employee to another Plan, Class, Division or Policy, click the **Transfer Member** button under Group.

The **Transfer Member** screen will appear with the employee's current information displaying in the upper part. Choose the new Policy, Division, Class and Plan along with the effective date of the change.

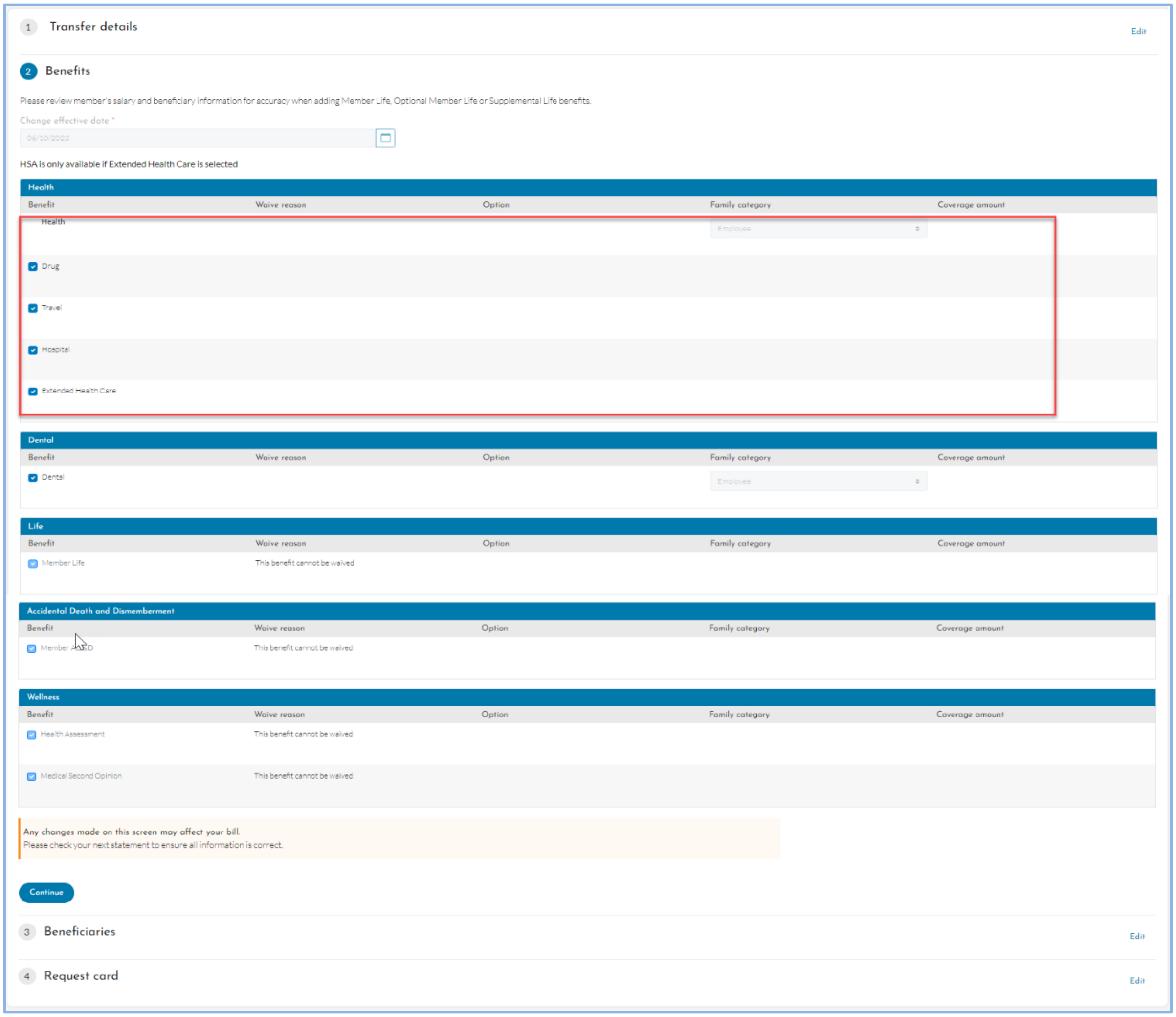
Note that if the effective date of the change is in the future, you can request a new card however, you will need to add the effective date of the change in the card request.

***Note**: If policy has H.S.A., policy to policy transfer is not possible.Please send to Saskatchewan Blue Cross.*



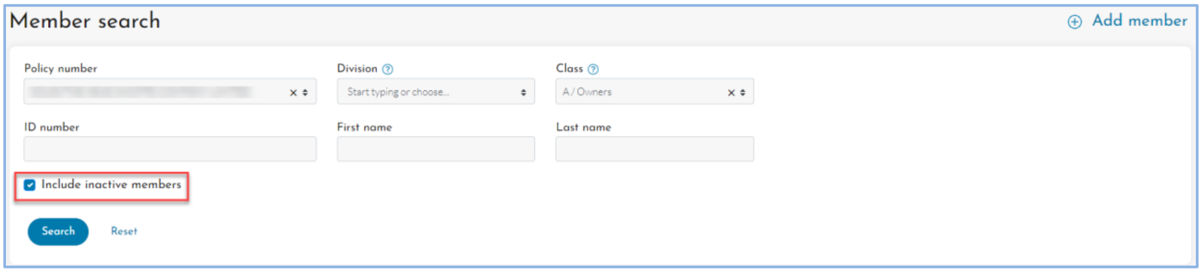
- If the transfer effective date is more than 30 days in the past or 90 days in the future, contact your service representative at Saskatchewan Blue Cross.
- The employee's current choices will display and can be clicked on and changed as needed.
- After updating benefits, you will be automatically navigated to the Beneficiaries page.

Notice that all 4 health benefits should always be checked or unchecked together.

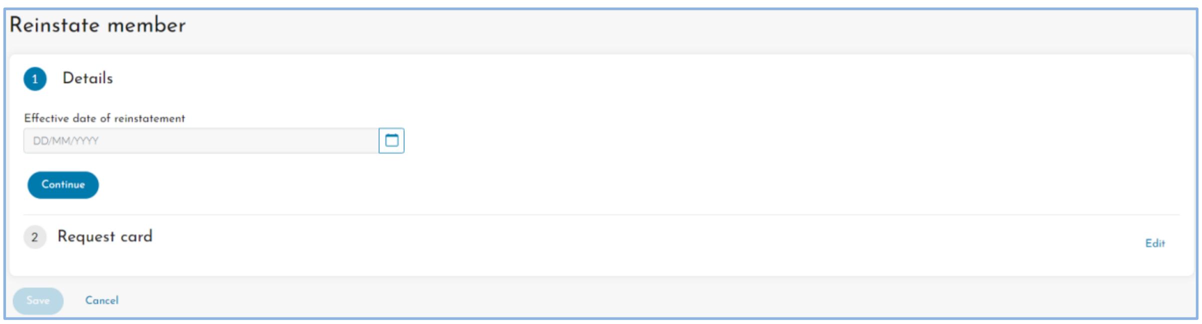


Reinstating an Employee

To find terminated employees, the **Include inactive members** box needs to be checked before clicking Search.

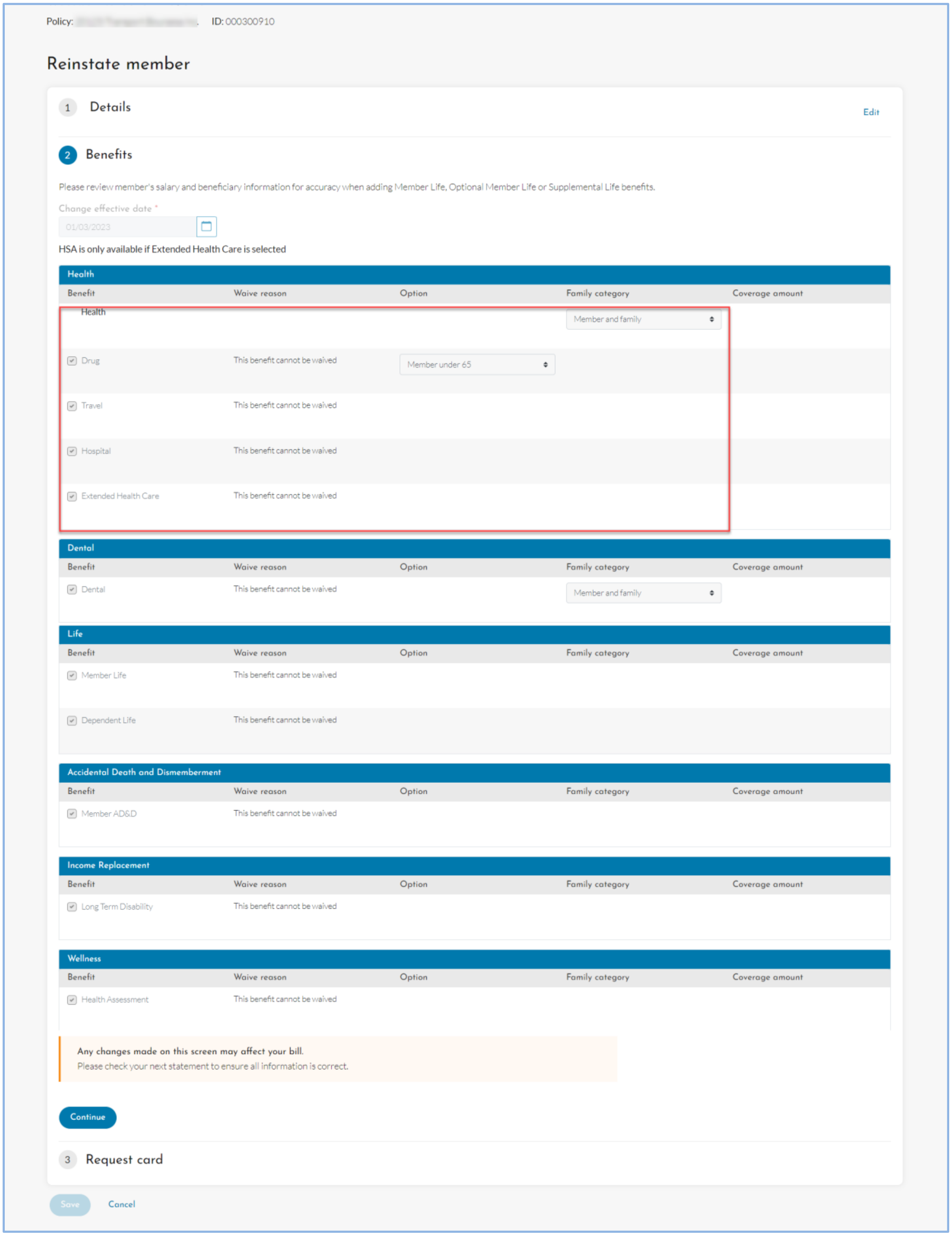


- After selecting the employee to reinstate, click on **Reinstate Member**.
- This function allows reinstating coverage for an employee who's been on temporary layoff for less than 6 months, or 12 months if he had health and dental coverage only.
- **Note: HSA** will also automatically be reinstated if an employee had it. A new enrollment should be made if the intent is not to carry forward this HSA.
- You will be prompted to choose the **Reinstatement Effective Date**.



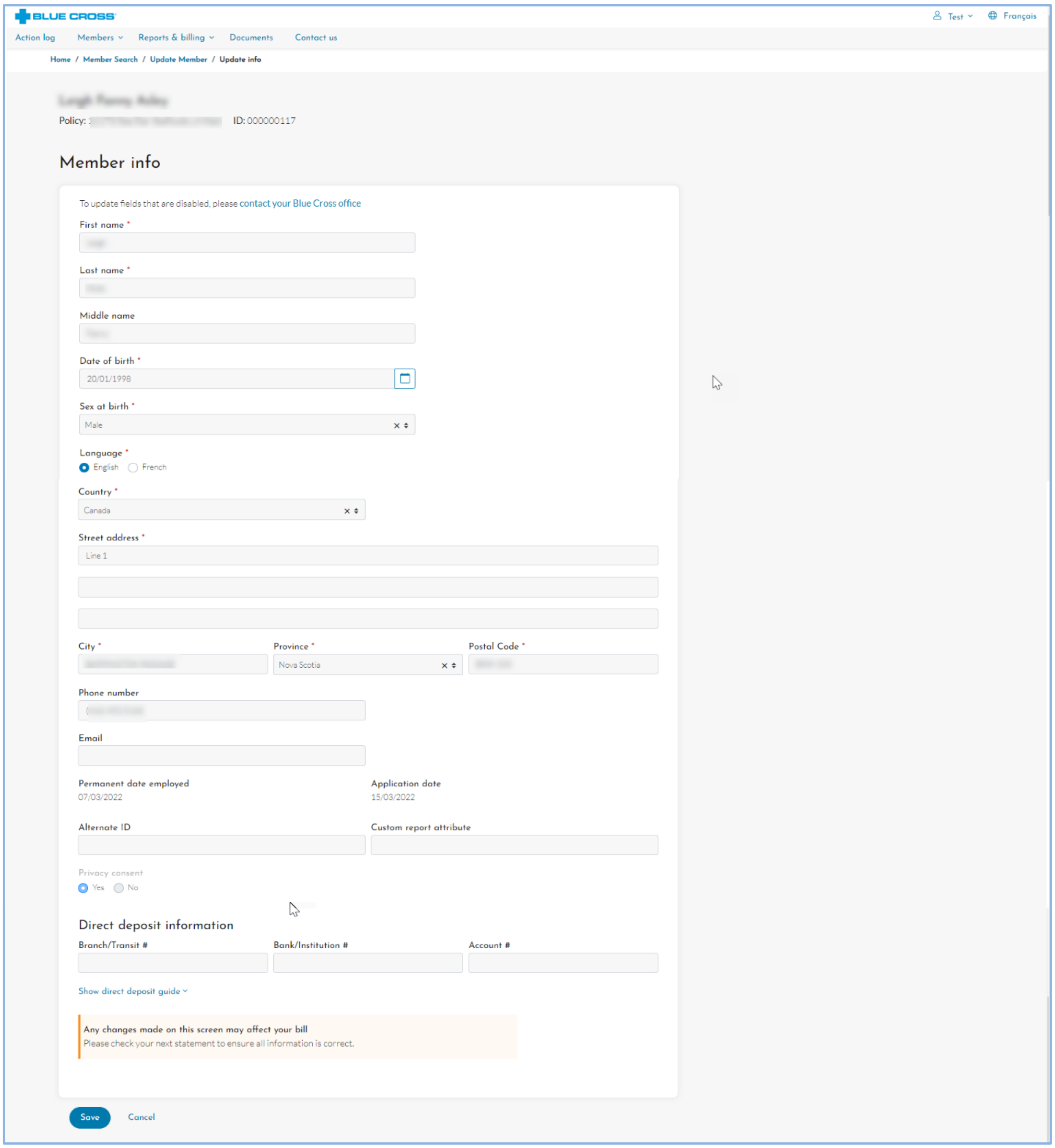
- Then, the employee's previous choices will display, and can be clicked on and changed as needed.
- After updating benefits, you will be automatically navigated to the **Request Card** page.

Notice that all 4 health benefits should always be checked or unchecked together.



Updating Employee Information

To update an employee's information, such as name, address, or direct deposit banking information click the **Update** button at the bottom of **Member info** section. A screen with input fields will appear.



If Country, United States is chosen, State and Zip Code fields will be available.

If Other Country is chosen, use the three fields provided to enter the full address.

Note: Some fields, such as “Permanent Date Employed” or “Application Date”, cannot be changed on the portal. Should these fields require a change, please contact your service representative at Saskatchewan Blue Cross.

Family Member Changes

To make family member changes for an employee (e.g. updated marital status), click the **Update** button under the Family Members section.

To update an existing family member, click on their name. The Edit Family Member section will open.

When a child is within 60 days of maximum age of being a minor, or when they have reached the maximum age within the last 30 days, a check box titled **Change Relationship Type to Student** will appear and can be checked off before clicking **Save** if the minor will be attending post-secondary education for the next year. If not, the **Reinstate Family Member** button will appear.

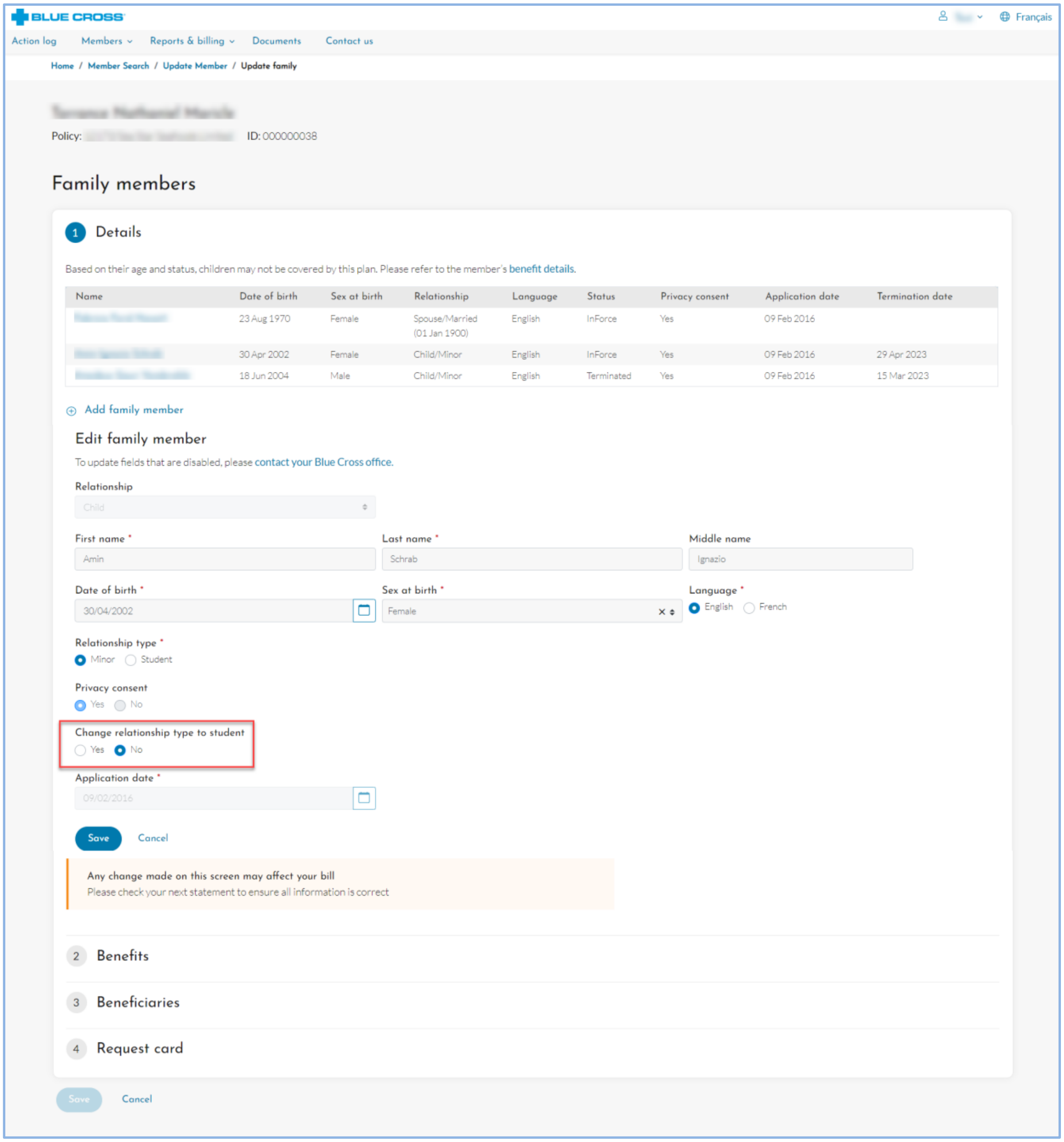
To add a dependent, click **Add Family member.** Disabled dependents cannot be added through the portal.

After adding or updating one or more family members, you will be automatically navigated to the **Benefit Changes** page. Be sure the Family Category to **Member and Family** if they need to be covered. You will then be automatically navigated to the Beneficiary page.

Note: When adding family members, you will also need to review the Selected Benefits Details to ensure the new family members will be covered.

To **terminate a dependent**, click on the dependent hyperlink name and add a termination date and select a termination reason.

After terminating one or more family members, you will be automatically navigated to the Benefit Changes page. If there are no more active dependent, be sure to change the Family Category to **Member**. You will then be automatically navigated to the Beneficiary page.

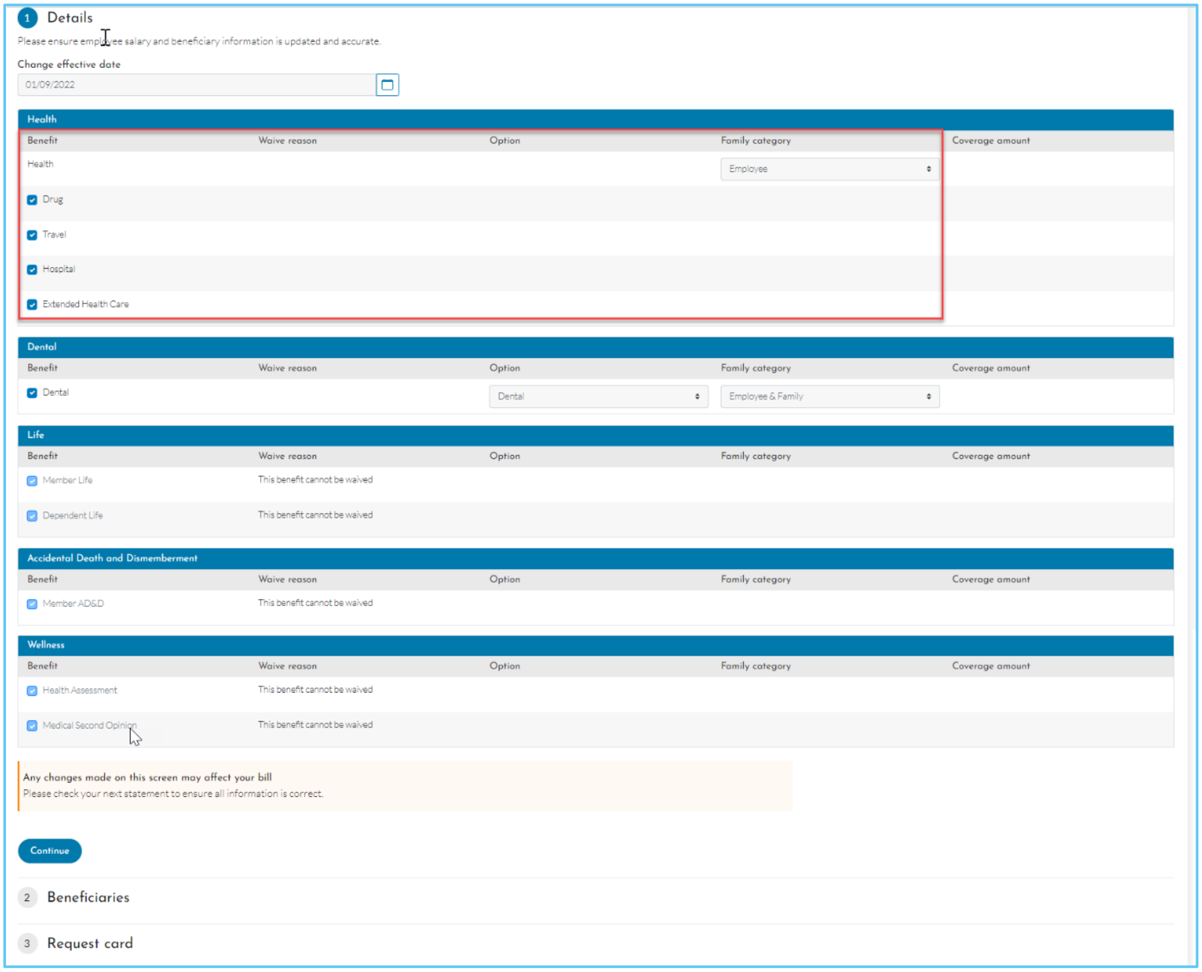


Benefit Changes

To view and/or change an employee's benefits:

- Click the **Update** at the bottom of the **Benefits** section.
- The employee's current choices will display and can be clicked on and changed as needed.
- After updating benefits, you will be automatically navigated to the **Beneficiary page.**

Notice that all 4 health benefits should always be all checked or unchecked together.



To Review an Employee's Benefits

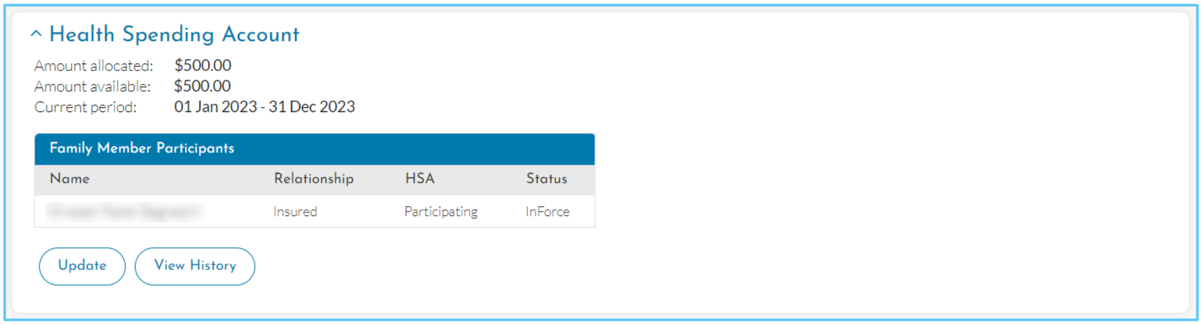
- Ensure that the correct setting is chosen for each benefit (e.g. Dental)
  - » For: Member = Only the employee is to have coverage
  - » For: Member & Family = Everyone in the family can submit claims for that benefit.
  - » Employee & Family = The employee and eligible family member can submit claims for that benefit. If a dependent has waived out of the coverage, you will need to check the benefit details for that specific dependent to ensure coverage is InForce.

Health Spending Account and Personal Wellness Account

If the member has access to these accounts, the information can be found in this section.

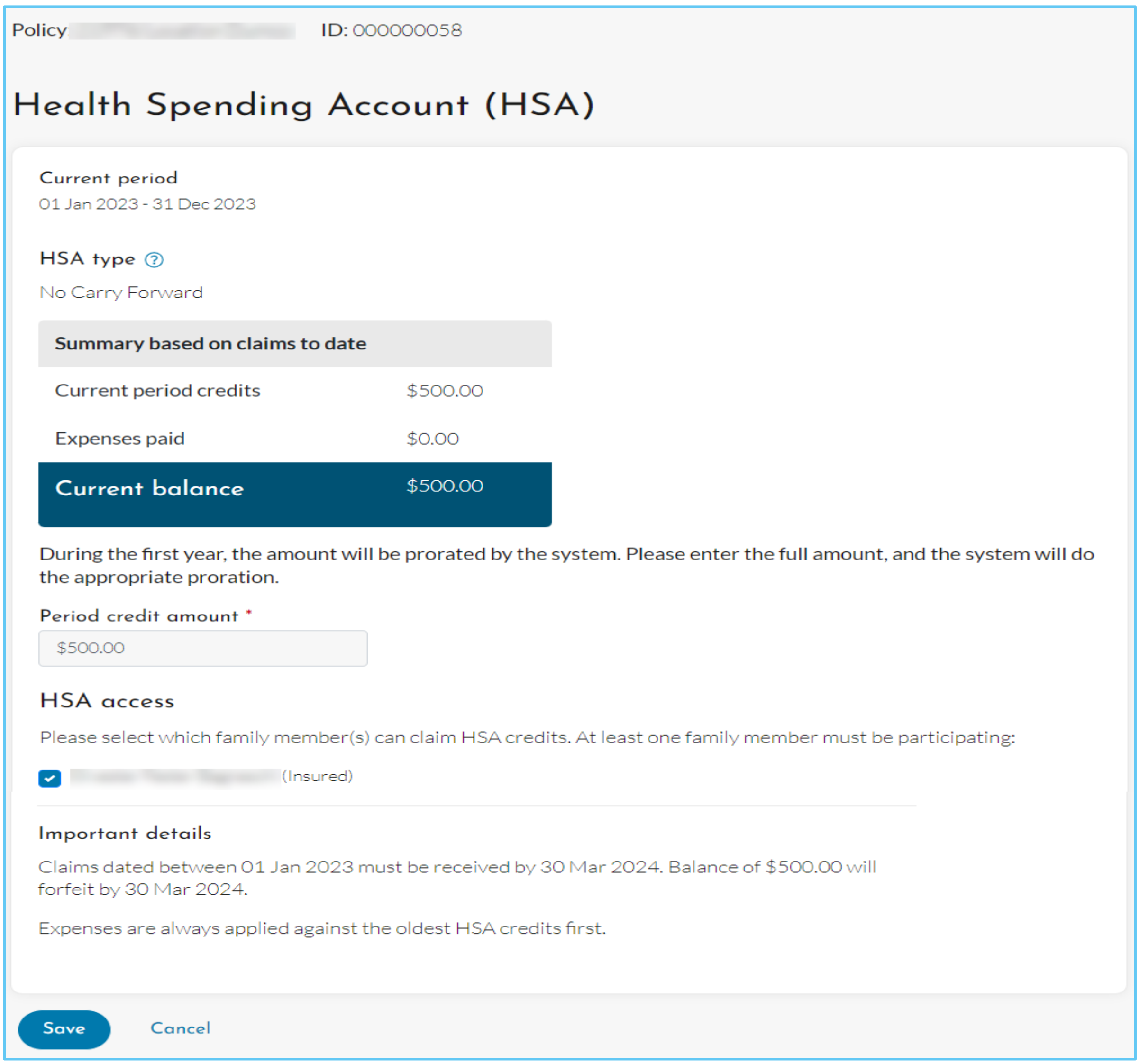
- The employee's **Current Balance** will display.
- To see balance from previous years click **View History**.

Note: PWA cannot be updated on the portal. Please send updates to Saskatchewan Blue Cross.



To update the employee’s Allocation Amount and the participation of family members to the H.S.A.:

- Click the **Update** button under the Health Spending Account section.



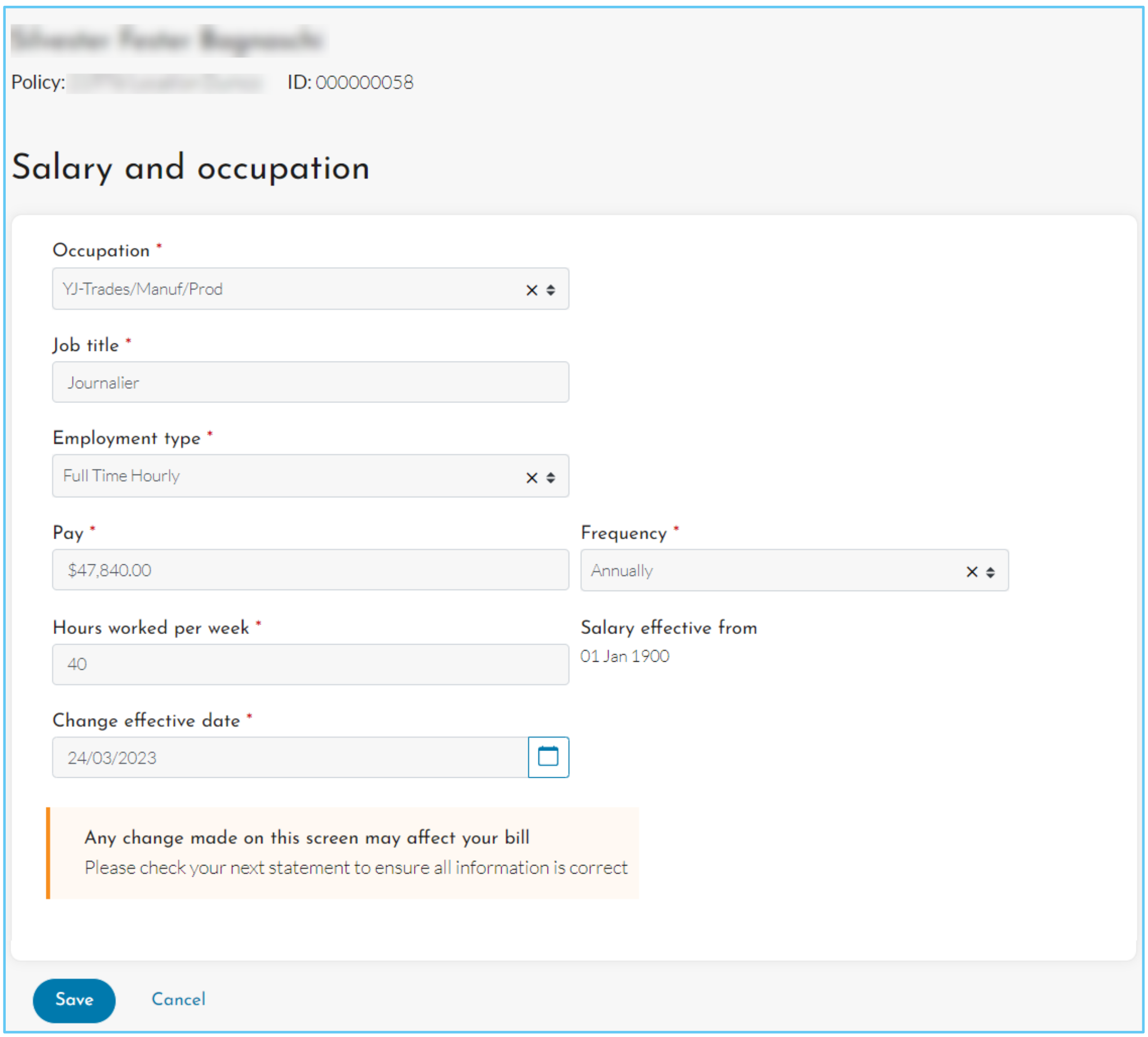
Salary and Occupation Changes

If the employee changed their occupation, or has received a salary change, click the **Update** button under **Salary and Occupation** to update an employee's occupation and/or salary amount. When you change the salary, you must provide a new salary effective date.

When inputting the salary amount, it is important that the Salary Amount and the frequency match. If the Salary Amount enter is an annual amount, the frequency field should read Annually. If the reported amount is the member's hourly rate, then the frequency would need to read Hourly. Frequency does not reflect rate of pay.

Note: Be sure to choose a valid **Occupation** when making a change to this screen. The **Salary Amount** can be set to zero if there are no salary impacted benefits. In this case, please ensure that the **Frequency** is set to **Annually**.

Caution: It is important to maintain updated salary information, especially if employees have benefits based on salary (e.g. LTD).



Beneficiary Changes

To change the beneficiaries on an employee's Life, Supplemental Life or Optional Life Benefits, click the **Update** button in the **Beneficiaries** section. It is very important to maintain the signed and dated updated Change Form or Beneficiary Designation in your records in the event of the employee's death. The **Beneficiary Information** screen will open.

To change current beneficiaries:

- Update First name, Last name and relationship.

To remove existing beneficiaries:

- Click the **X** button next to the existing beneficiaries and fill in new values.

To add additional beneficiaries:

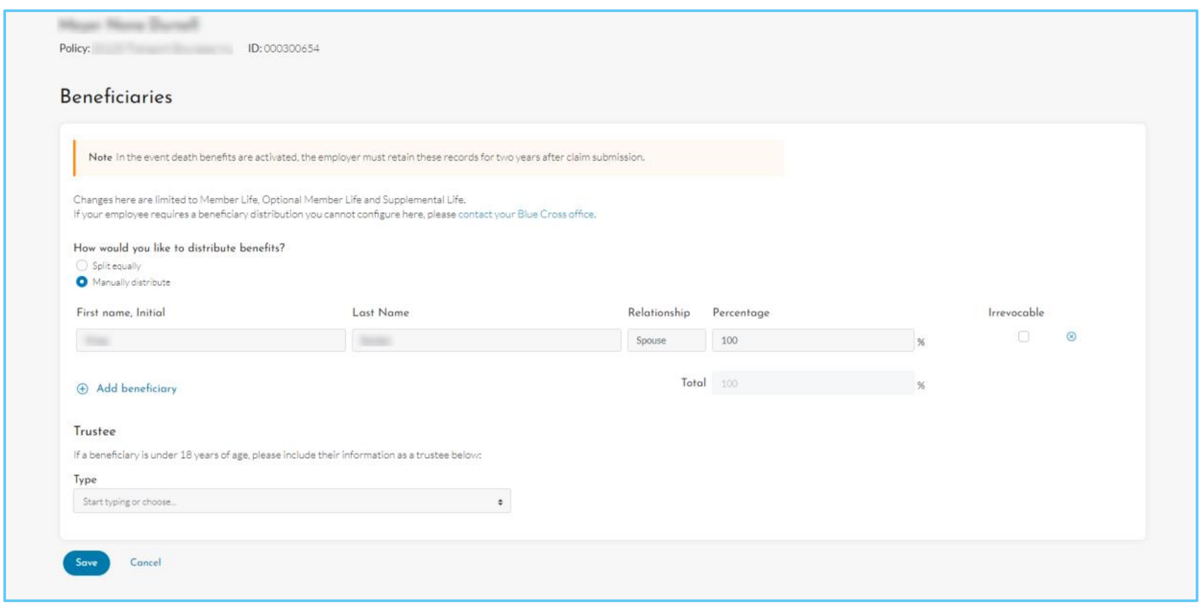
- Click **Add Beneficiary**, and a new blank row will be added.

If you choose the "contact Blue Cross office" radio button option, you will need to send in a copy of the completed and signed Change Form or Beneficiary Designation form to Saskatchewan Blue Cross for processing.

To change irrevocable beneficiaries:

- Changing an **irrevocable beneficiary** requires the written consent of said irrevocable beneficiary.
- After having the employee complete a Change Beneficiary Form (available under **Documents** tab in the Administrator Portal), please submit the completed form to Saskatchewan Blue Cross.

Note: When making changes, ensure that the total percentages add up to 100%.



Note: To see if a beneficiary is irrevocable, look under the **Update Member** section of the screen at **Beneficiaries**.

A ✓ under **Irrevocable?** means the beneficiary is irrevocable and requires the written consent of said irrevocable beneficiary.

An ✗ under **Irrevocable?** means the beneficiary is revocable and the Employee can change the beneficiary at any time.

Coordination of Benefits

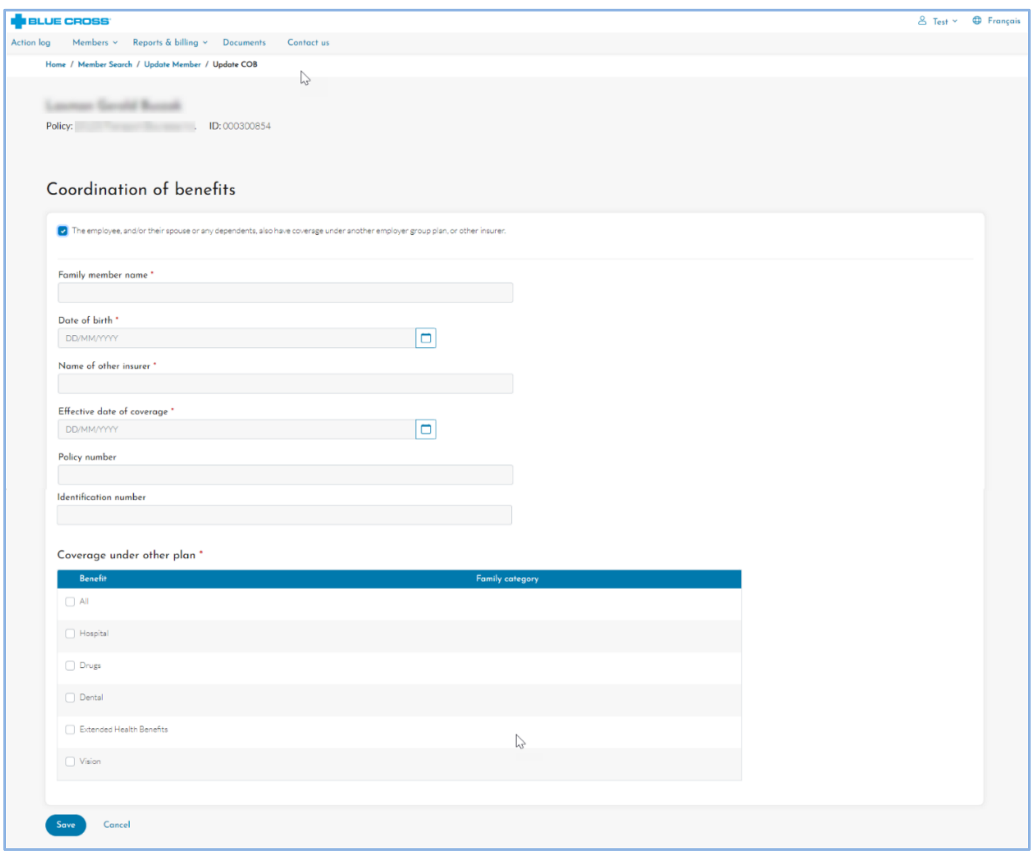
To change the data relative to other coverage of the employee or other family member(s), click on the Update button in the **Coordination of Benefits** section. The **Update Member** screen will open.

To indicate that there is no longer other coverage:

- Uncheck the box **The employee, and/or their spouse or any dependents, also have coverage under another group plan, or other insurer**. Then **Save**.

To add or change information about other coverage:

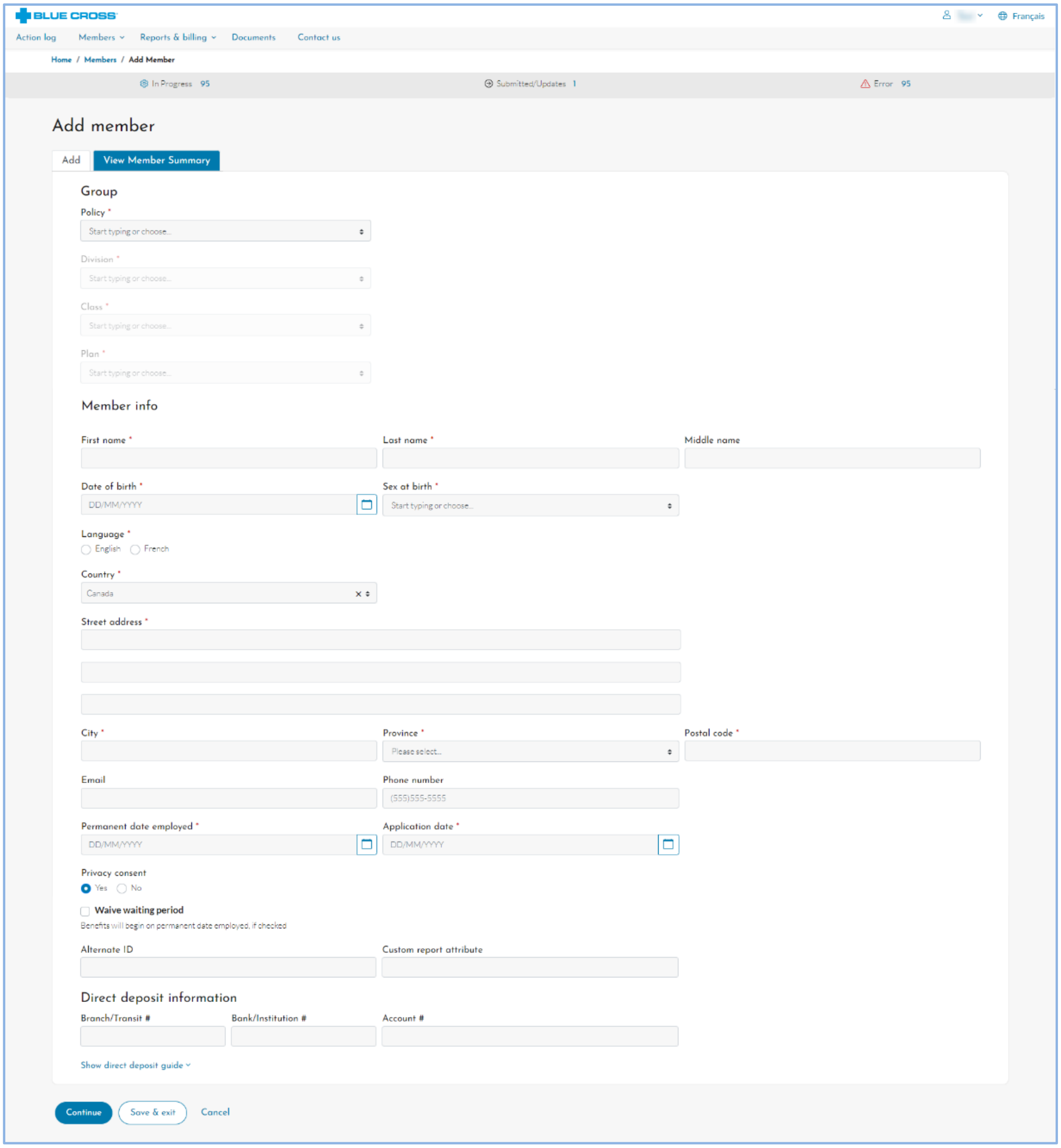
- Enter the information in the fields and check the appropriate boxes relative to the coverage type. Then **Save**.



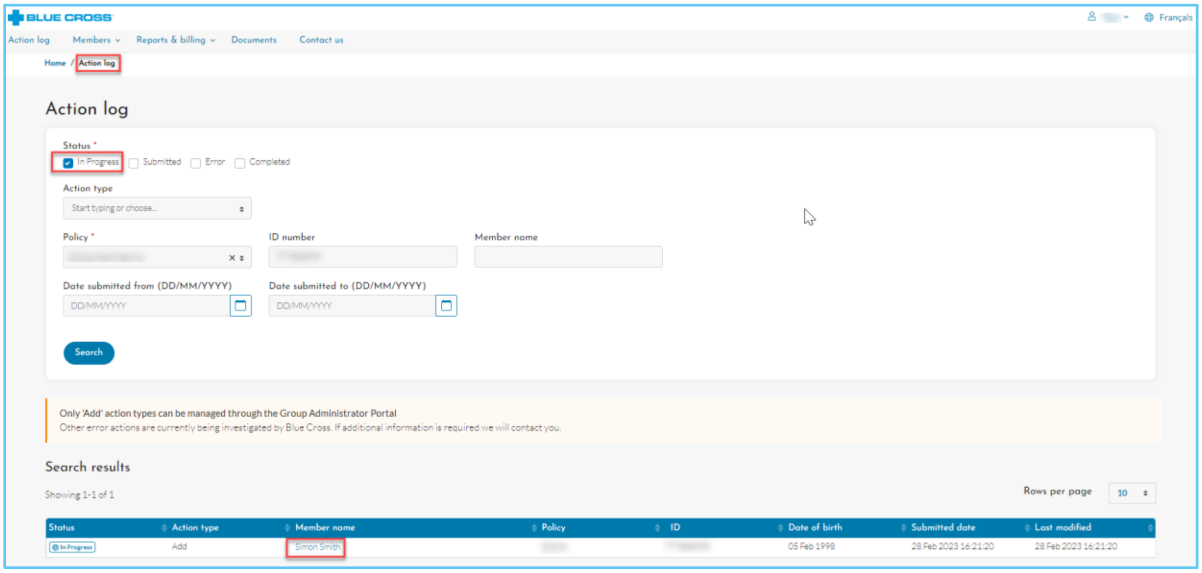
Adding an Employee

To add a new employee:

- Under **Members**, choose **Add Member**. The Add Member screen will open.
- Any employees whose new enrolments have been started, but not completed, can be found in the Action Log section.
- Fill in the form by choosing the **Policy**, **Division**, **Class** and **Plan** that the employee should be in.
- Add the employee information. The **Application date** is the date the employee signed the application form.
  If you need to waive the waiting period due to a hiring condition you can check the appropriate box.
- If your group requires the keying of an Identification Number, it must be 9 characters long (A-Z, 0-9, no spaces or special characters). First character cannot be A, K, R, M.
- Should members or participants request to have their privacy consent revoked, meaning if "no" is selected within the Group Administrator Website, Member portal and claims payment will be impacted. For more information, please refer to the Group Administration Guide.
- When the above fields are complete:
  - » Click **Save & Exit** to finish adding the member at a later time; or
  - » Click **Continue** to continue adding the member.
- At this point, the information added will begin to accumulate in the **View Member Summary tab** at the top of the page.
  - » The **Member Summary** will be updated throughout the entire process. Any errors will display there.



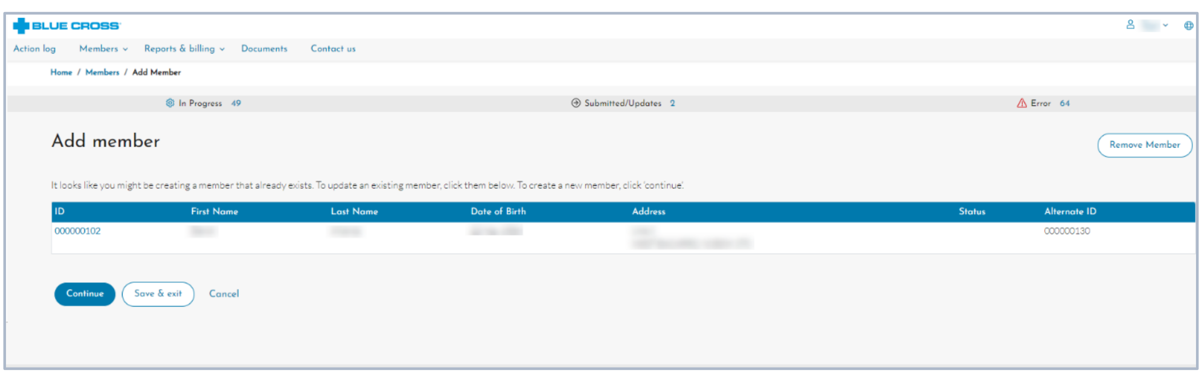
If you are interrupted, you can continue where you left off by finding the employee in the **Action Log** section and clicking on the employee’s name.



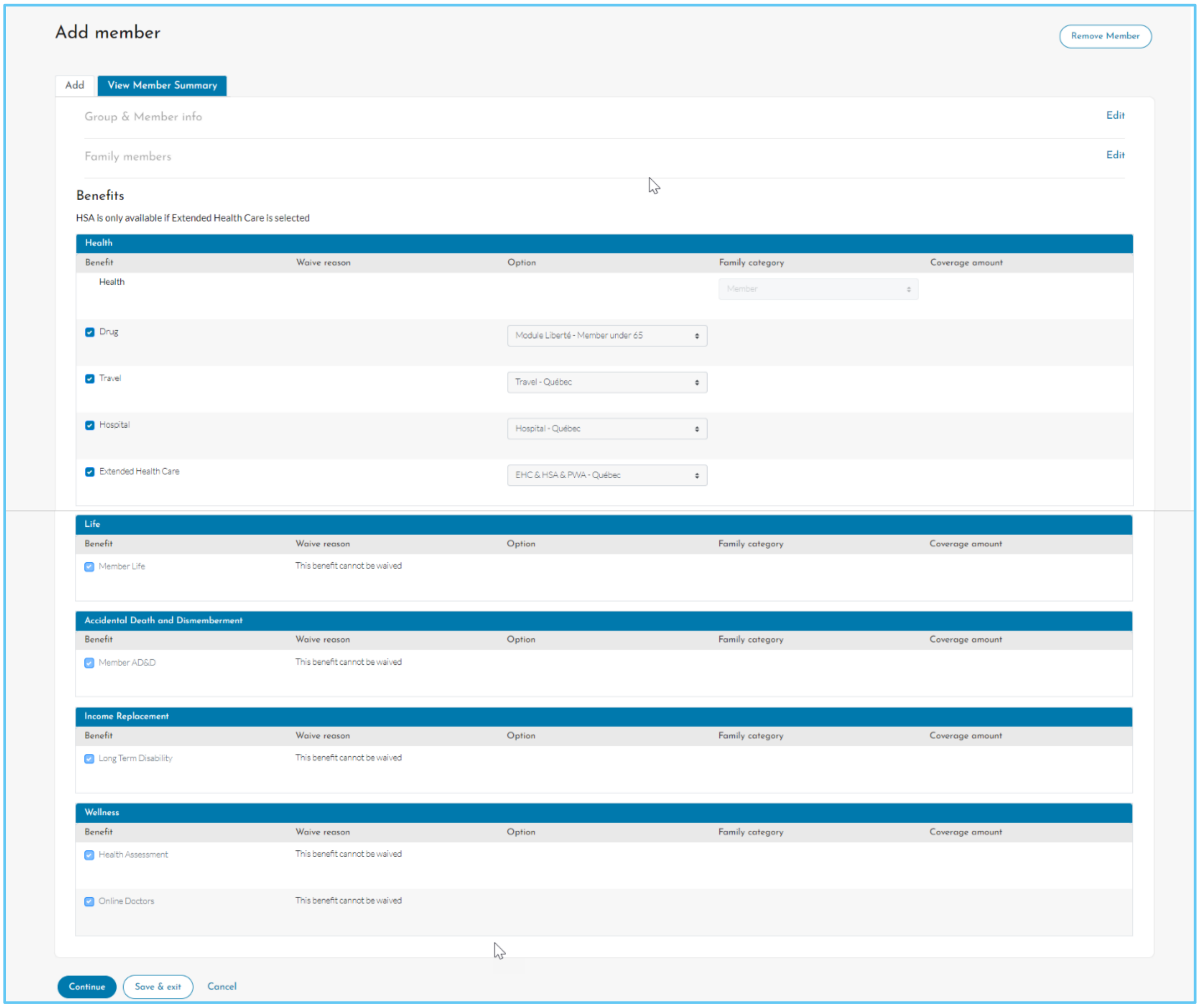
Note: If an existing employee has a similar name and birthday, that member's information will display along with the following message: "**It looks like you might be creating a member that already exists.**"

This makes sure that a member isn't added to the system twice. Should you encounter this message, you can do one of the following:

- Update the employee found by clicking their **ID**,
- Continue to add the new employee by clicking **Continue**; or
- Cancel adding the member by clicking **Cancel**.



Clicking **Continue** from the **Member info screen** will take you to the **Add Family Members** screen, followed by the screen to **select benefits**, where you can choose the **Options** from the dropdown menus if they are available in the plan chosen.



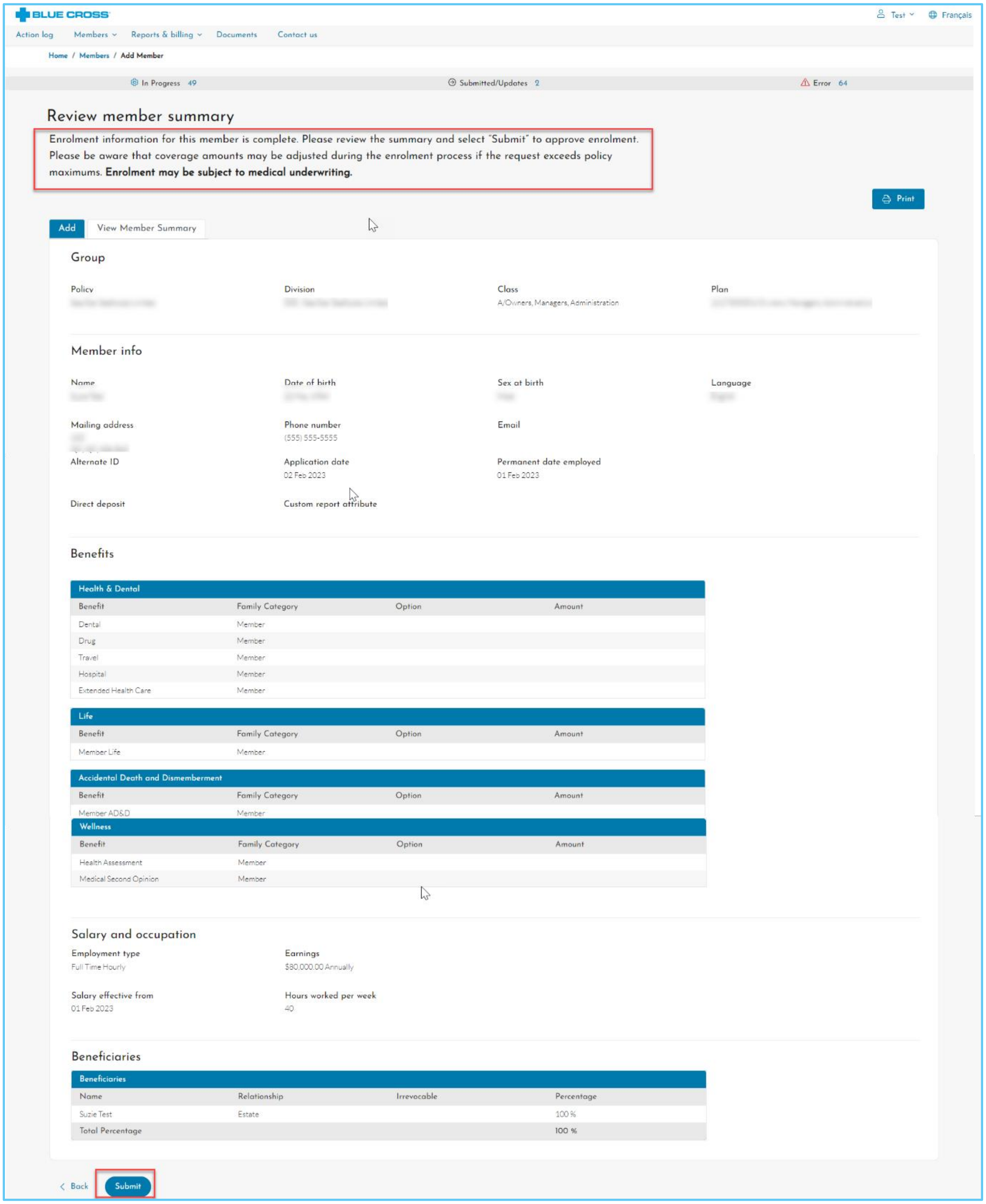
Clicking **Continue** will navigate to the screens to provide salary, employment, beneficiaries, and Coordination of Benefits. The information can be found on the employee's enrolment form.

Once all the information for the new member has been entered, the following message will display: "Please be aware that coverage amounts may be adjusted during the enrolment process if the request exceeds policy maximums**. Enrolment may be subject to Medical Underwriting**."

- At this point, please review the **Member Summary** to confirm all the provided information and make any necessary corrections.

Important:

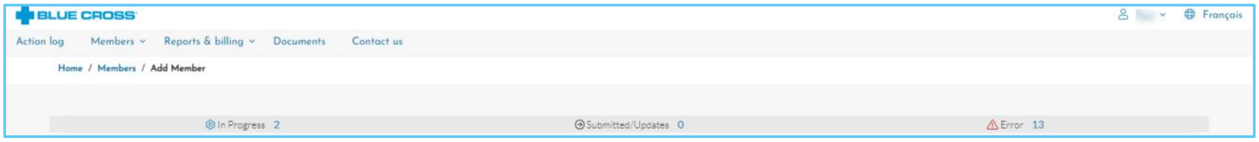
Once you are satisfied with your entries, **Click Submit**, and the employee's enrolment will be sent to Saskatchewan Blue Cross. The entry under **In-Progress Enrolments** will change to **Submitted Enrolments/Updates**.



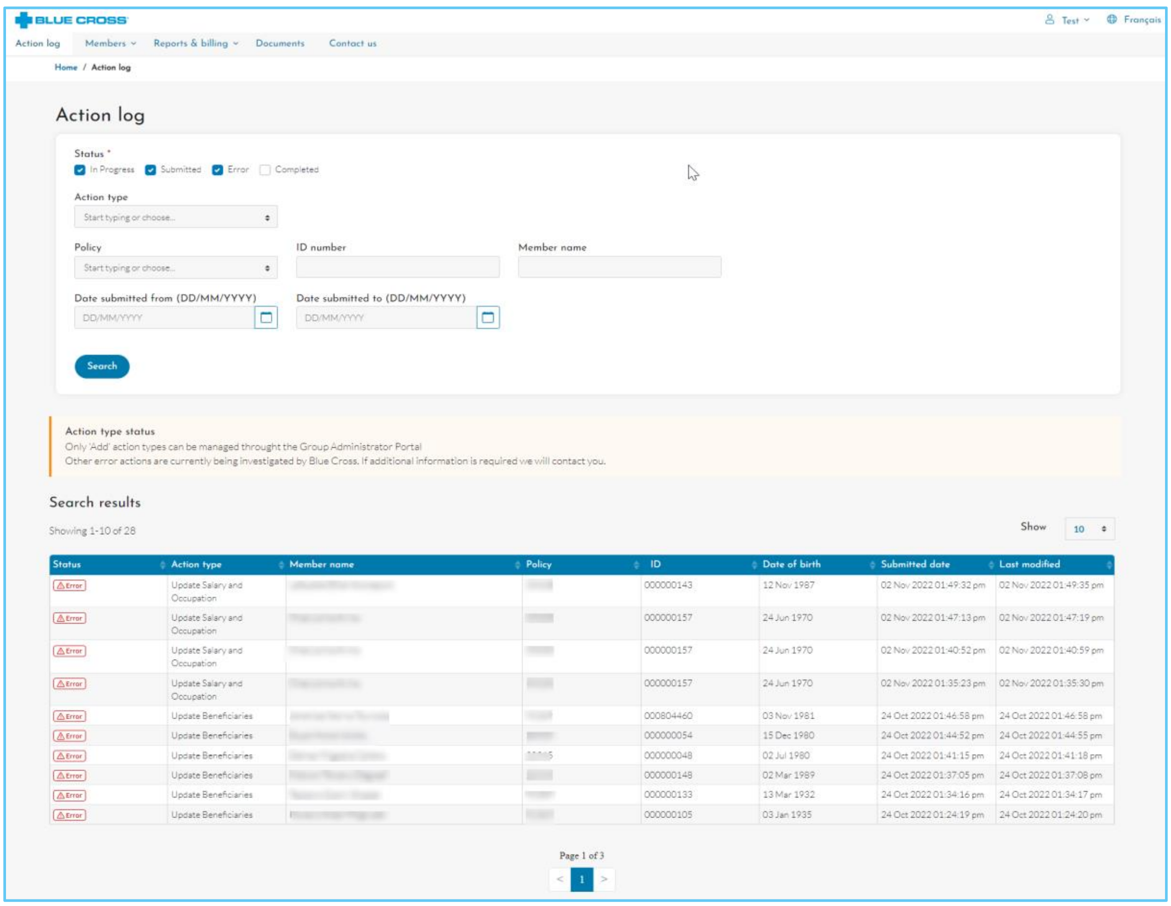
Action Log

You will have access to counts under **Action Log** that are in-progress enrolments, submitted enrolments, as well as updates and transactions that have provided an error or updated successfully.

- You can access **Action Log** from the Add Member or Member Search screen by clicking on the counts at the top of the screen; or



- by clicking the sub-menu item called Action Log.
- When you navigate to this screen by clicking on one of the counts from either **Add Member** or **Member Search**, the **Action Log** page does an automatic search for those types of actions.
- If you navigate to this screen by clicking on the sub-menu item Action Log, you will see all actions with **In-Progress, Submitted, Error and Completed** status (to a maximum of 100 records).

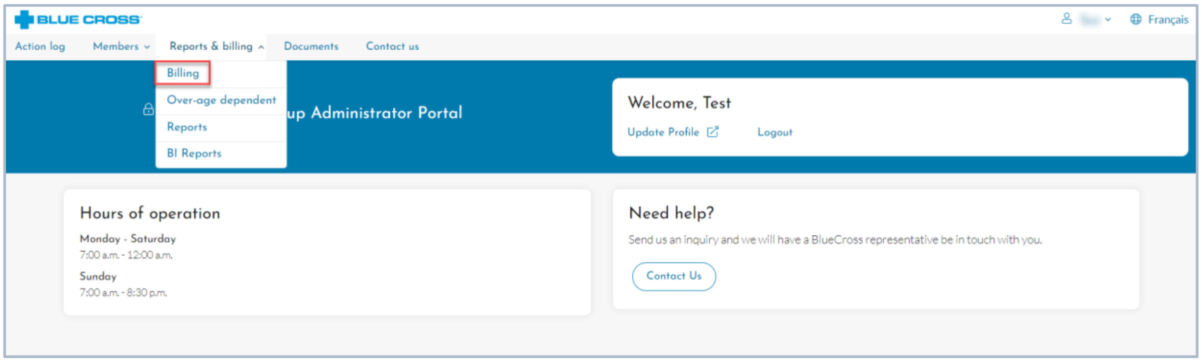


- In this section, you can change the **Search By** criteria to better target the actions you are looking for.
- You can also access any in-progress enrolments by clicking on employee name. This will return you to the Add Member page to continue or edit.
- Your Saskatchewan Blue Cross representative is available to manage any error updates.

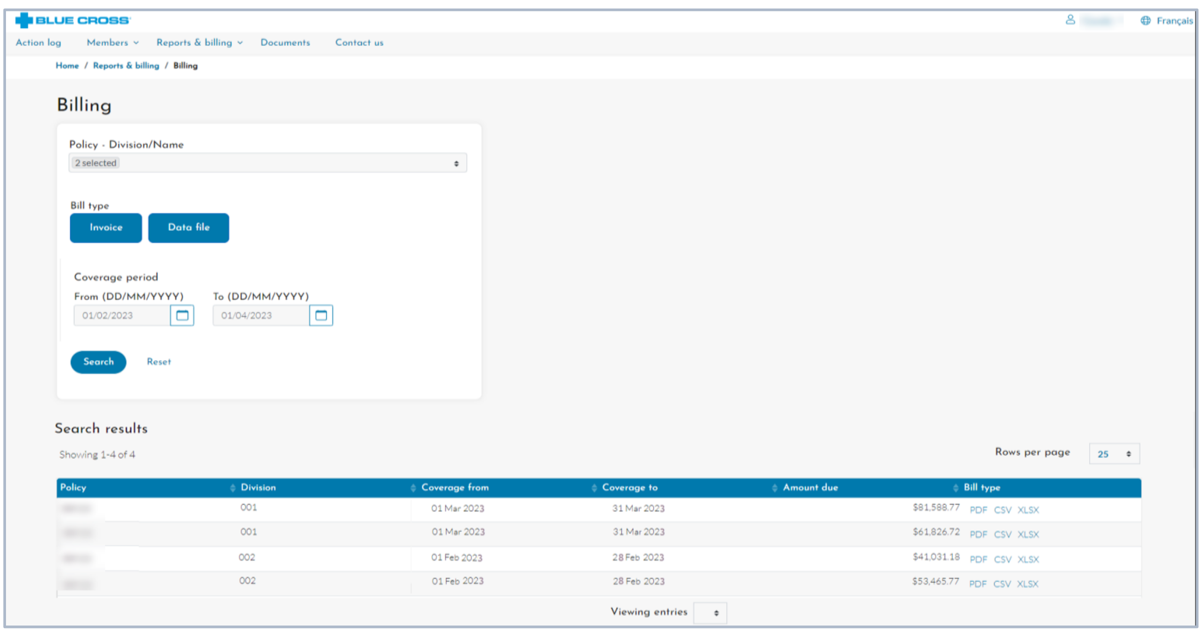
Billing

Viewing Bills (Formally known as eBills)

To view a Bill, click **Reports & Billing** on the Welcome screen. Then select Billing from the menu.

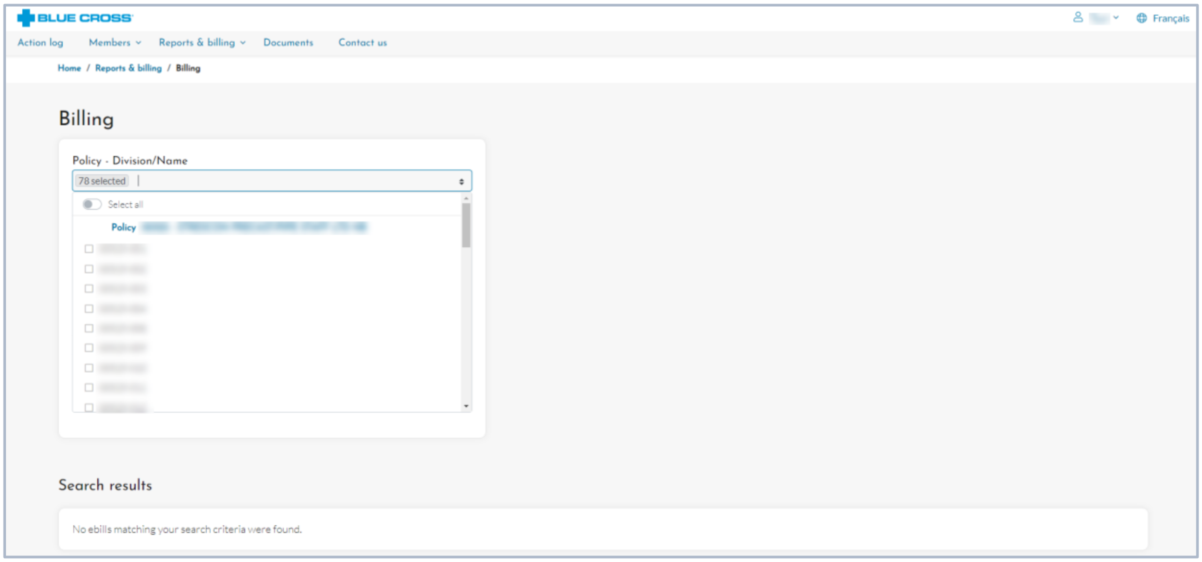


On the **Search Bills** screen, the most recent Bills, will automatically appear under the **Search Results**.



Viewing Specific Policies/Divisions

To view Bills for specific policies and/or divisions, select one or more options from the **Policy – Division/Name** drop-down. For a complete list of Bills, select **Select All**.



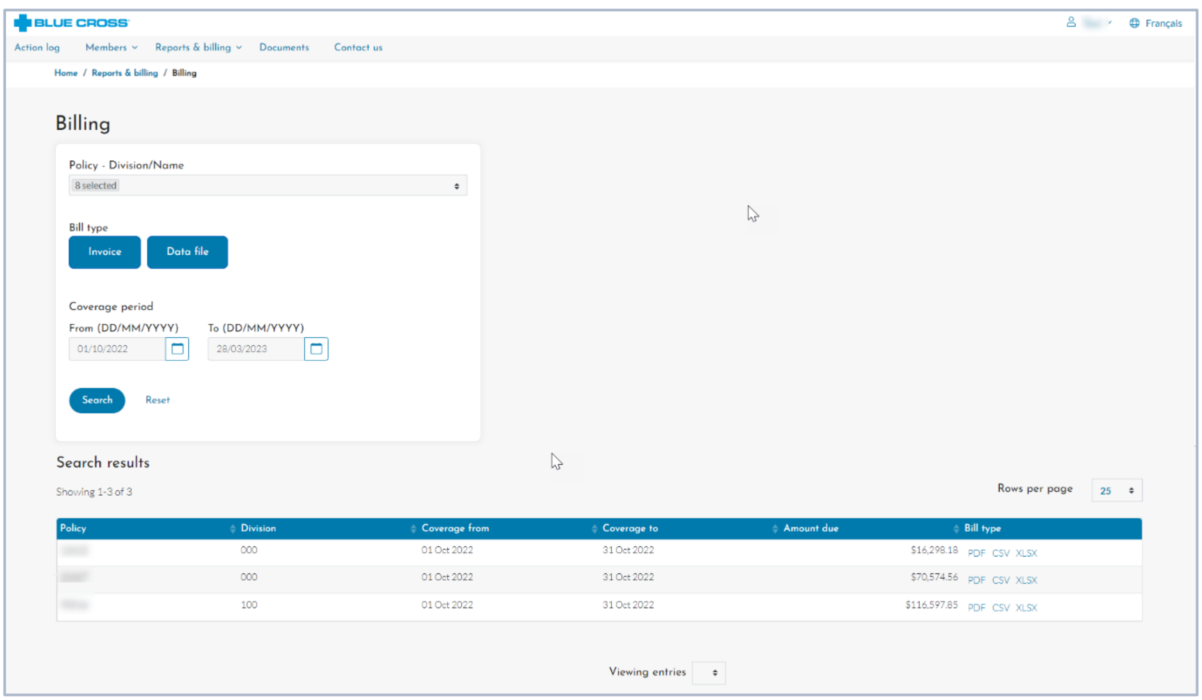
From **Bill Type**, the following options are available for viewing eBills:

- **Invoice:** PDF format (Remittance and Invoice Details)
- **Data File:** CSV, XLSX format (Excel spreadsheet data file).

*Both formats will appear by selecting both **Invoice** and **Data File**

Viewing Billing Period

In **Coverage Period**, **From** and **To** fields must be completed.



Within your Bills Search results, click either the PDF, CSV or XLSX links to view, print or save the Bill.

How to Read a Bill

Please refer to the Saskatchewan Blue Cross Invoice Guide for Group Administrators.

Other Things to Know

Online Reports

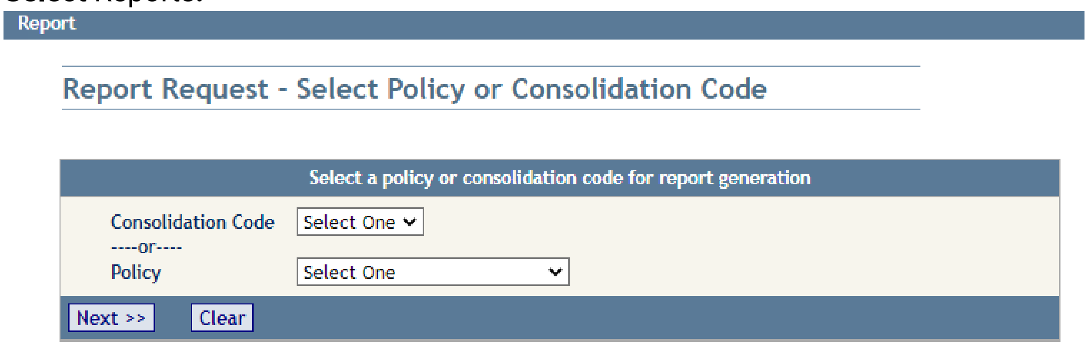
The Online Reports system allows Group Administrators and Agents/Consultants to query their own claims data and benefit information with an easy online interface.

The following information will help guide you in accessing these reports.

How to Run a Report

Note: If no reports are available, the following message will display: “No reports available for download.

- **Select** Reports**.**



- **Click the** Consolidation Code **or** Policy/Division **drop-down box.**

  Note: If no reports are available, the following message will display: “No reports found."

- Select a report from the list available. Each report has its description noted alongside the report number. The reports available online to be displayed are as follows:

- Click **Next**.
  Note: If no reports are available, the following message will display: “No reports found.”

Entering Query Parameters

When entering the appropriate query parameters:

- Any field marked with an (*) is a required field.
- The standard date formatting for all reports is YYYY-MM-DD.

- Note what dates are available for the query parameters. This is noted directly below the description of the report.
- Choose the language for the report to be presented in (**English** or **French**).
- Select the **Report Format (PDF, RTF, or EXCEL).**
- Click Submit Report Request. The report will open in the specified format.
  Note: Appropriate computer applications are required for the various file types. The following is recommended:

File Type	Application
PDF	Adobe Reader
RTF	Microsoft Word
Excel	Microsoft Excel

Note: Error messages may appear when submitting a request. The error message will often indicate why certain parameters did not work.

Selecting a Previously Requested Report

To select a previously requested report:

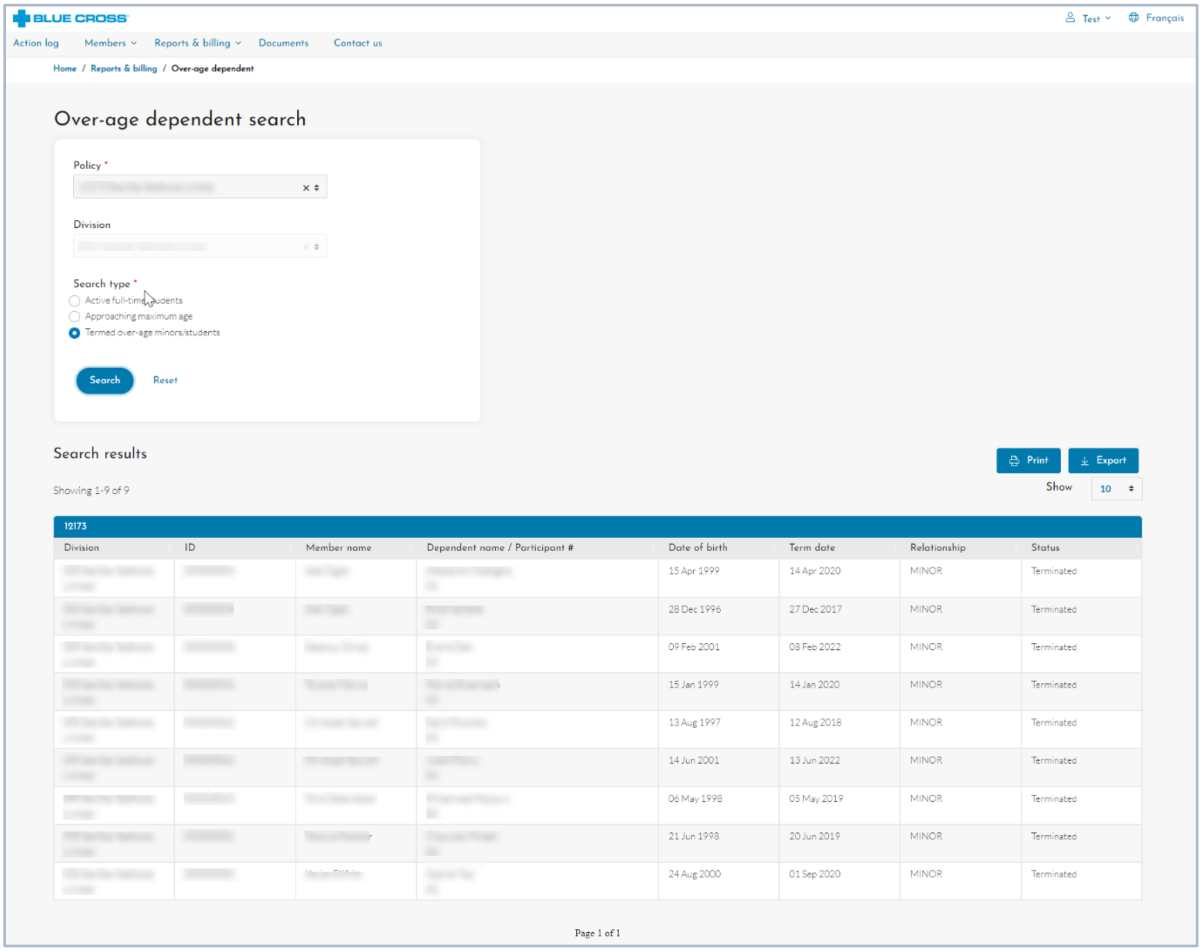
- Click Report at the top left of the screen and select Download Report.
- Select the report to be downloaded.
- Click **Download**.

View Overage Dependents

You can view, print, or extract a listing of dependents that are currently Active Full-time Students, Approaching Maximum Age, or Termed Overage Minors/Students. This listing will help you to manage students in your policy.

To view the overage dependent listing:

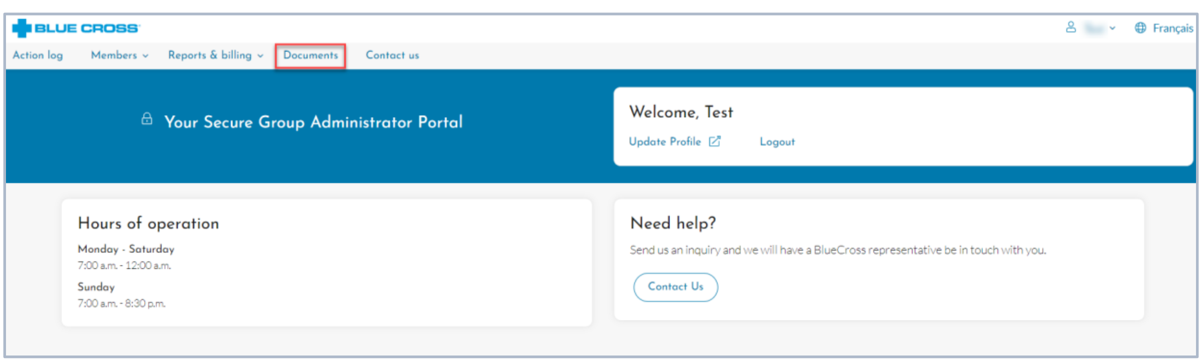
- Under **Reports & Billings**, choose Overage **Dependents**. The Overage Dependent and Student Status search screen will open.
- Specify the **Policy** number you are searching for. The Division field is not mandatory and by leaving this blank your results will include all divisions.
- Choose the **Search Type** by selecting Active Full-time Students, Approaching Maximum Age, or Termed Overage Minors/Students, depending on the required search results.
- You can also Search for a specific Dependent or Employee using the Search field within the Search results
- The search results may be extracted to Excel (save to CSV), printed, or simply viewed.



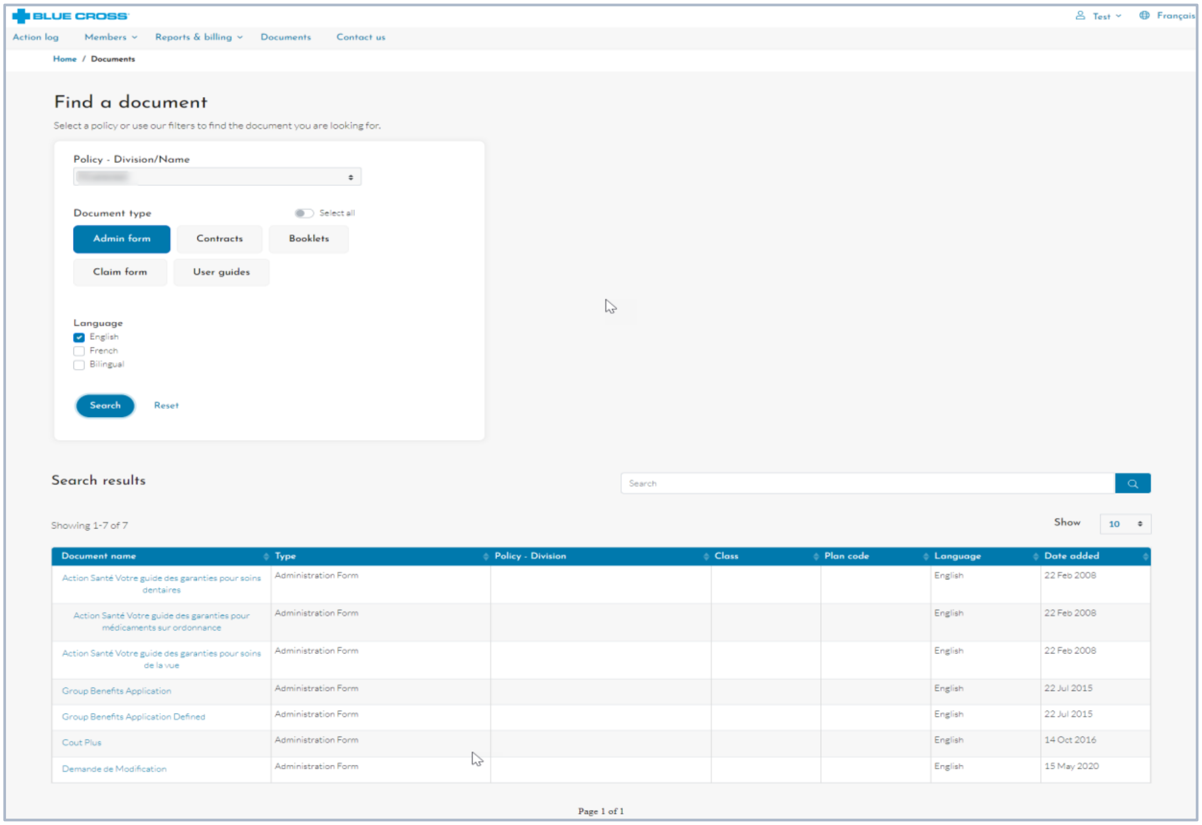
- The **Approaching Maximum Age** list of dependents being displayed is limited to dependents that will terminate within the next 60 days or have been terminated within the last 30 days. It is possible to pre-subscribe or reinstate dependents as Students. To learn how to do this, see the **Family Member Changes** section.

Finding Forms, Booklets or Other Documents

You can search for specific forms or brochures under **Documents**.



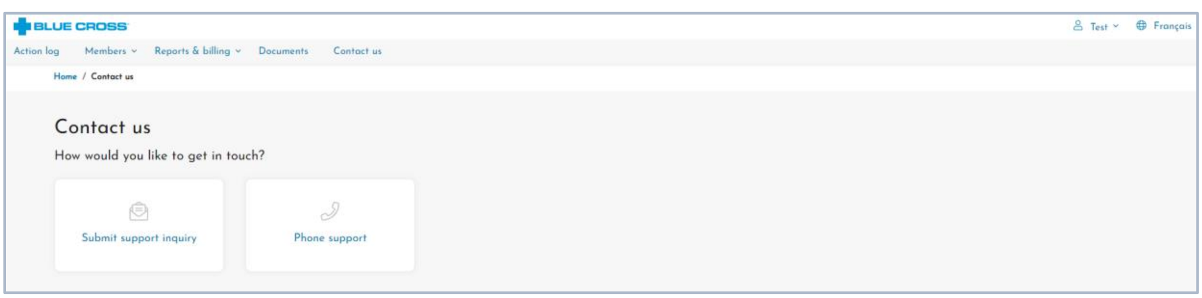
For example, you can find the Administration and Claims by searching for them. If the policy has specific forms, you can also specify a policy and division and those will also be returned in the search.



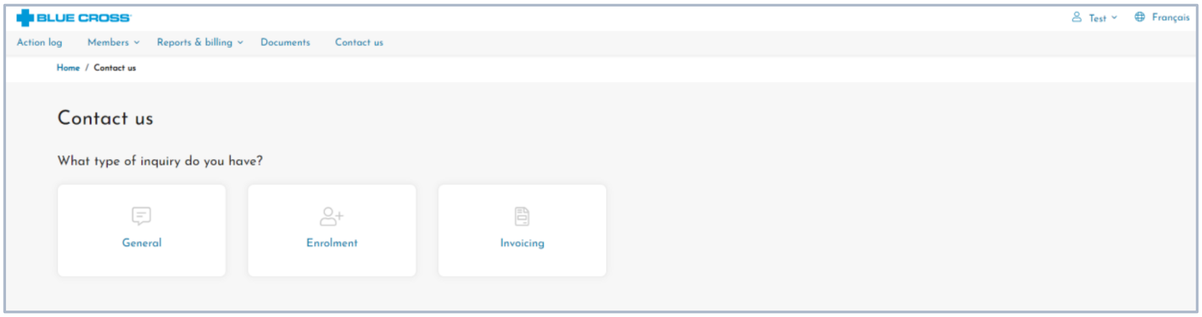
Getting in Touch with Blue Cross

If you have any questions or comments to share, or you would like to look up an address or phone number for one of the Blue Cross offices anywhere in Canada, click **Contact Us**.

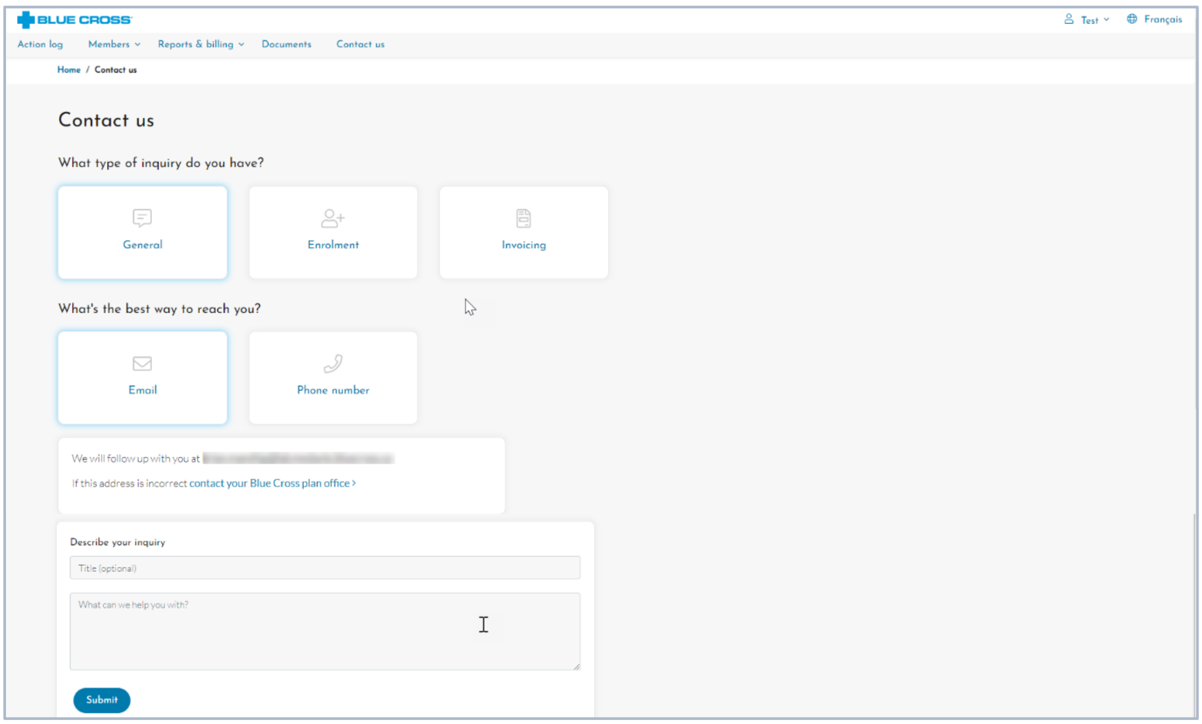
The Group Service Centre can be reached at 306-667-5861 or GroupServiceCentre@sk.bluecross.ca.



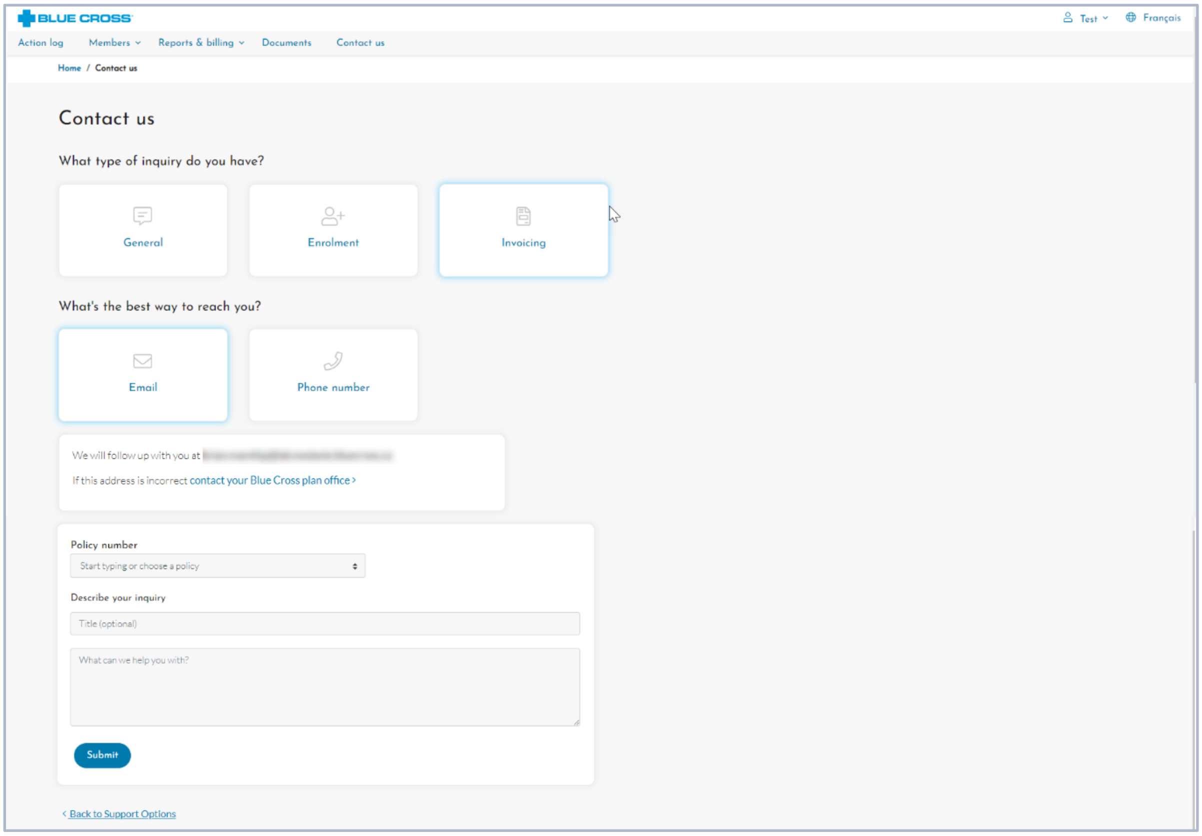
From here you can either **Submit Support Inquiry** or select **Phone Support**. When you select **Submit Support Inquiry** you will be presented with three types of inquiries: General, Enrolment and Invoicing.



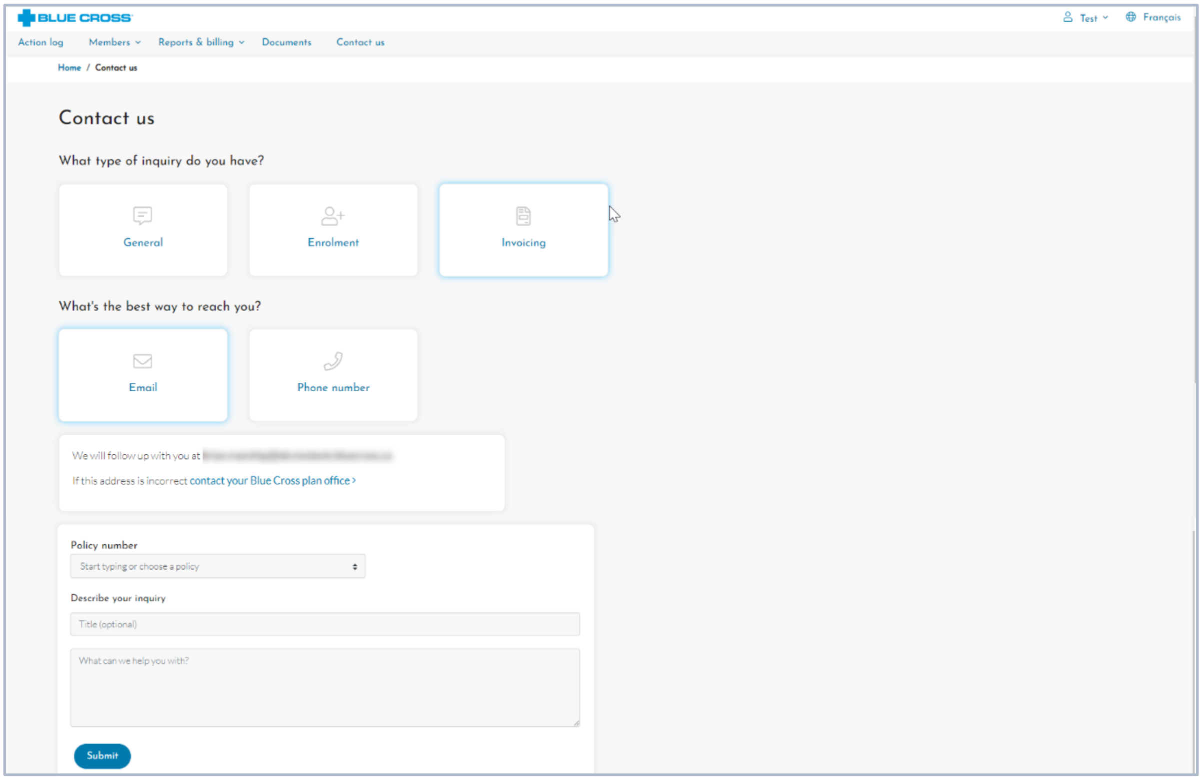
Once you select **General** inquiry you will be asked for the best way to reach you as well as a box to input your question.



If you select Enrolment you will need to input the Policy Number, Member Name or ID as well as describe your inquiry.



For the Invoicing inquiry you will need to input your Policy number as well as describing your inquiry.



Selecting Phone Support will give you the addresses as well as the phone numbers for the Medavie offices.