State Health Plan

eBilling Client Guide

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Introduction

eBilling is a tool provided by BCBSNC in partnership with Benefitfocus that allows HBRs to view and pay their bills quickly, accurately, and securely. This guide outlines the functionality offered by eBilling and how to use it.

Logging into eBilling

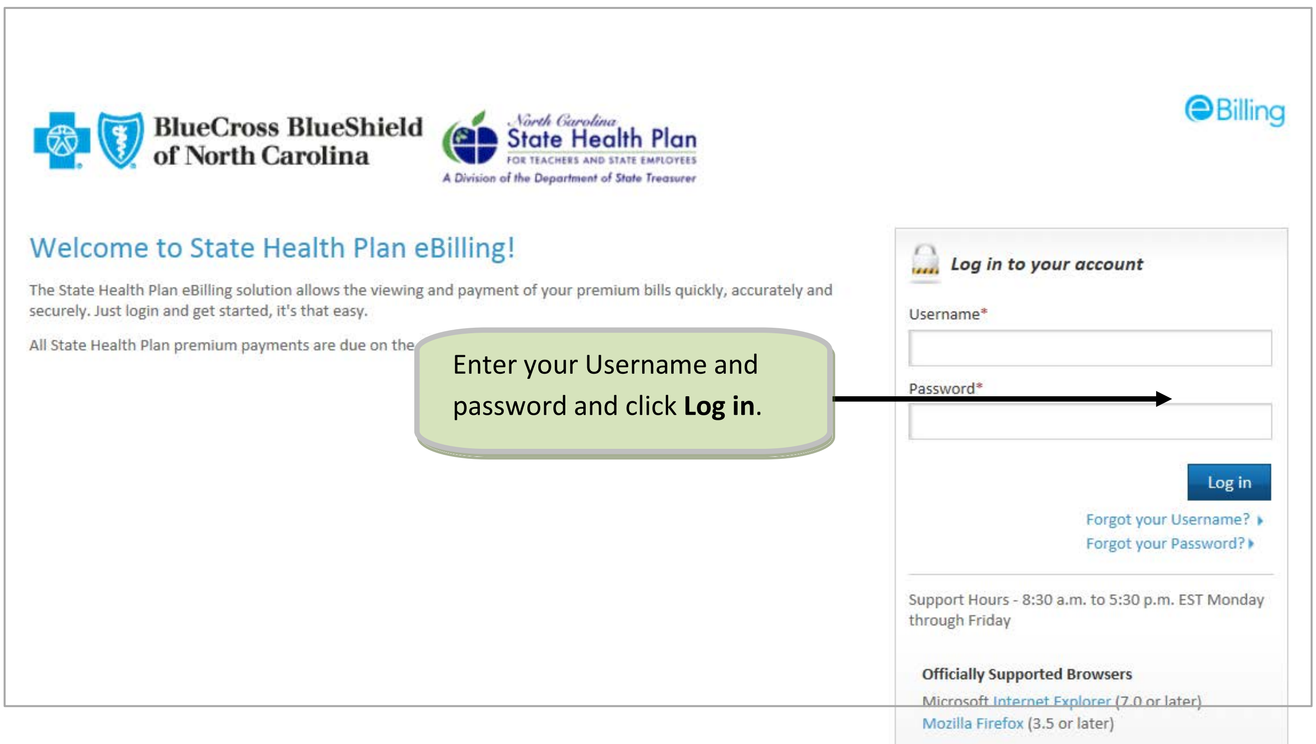
Obtaining your Login Information

You will be able to access the eBilling tool by navigating to https://bcbsnc-shp.secureebilling.com . If you use the Communications Portal, you will be able to access eBilling from there.

If you already had a username and password, that information will remain the same. To obtain a Username and initial password for the eBilling application, contact BCBSNC by calling 800-245-7319 or e-mailing stateppoinvoice@bcbsnc.com.

Once you click the link from either of the above locations the first time, the State Health Plan eBilling login page displays as seen below..

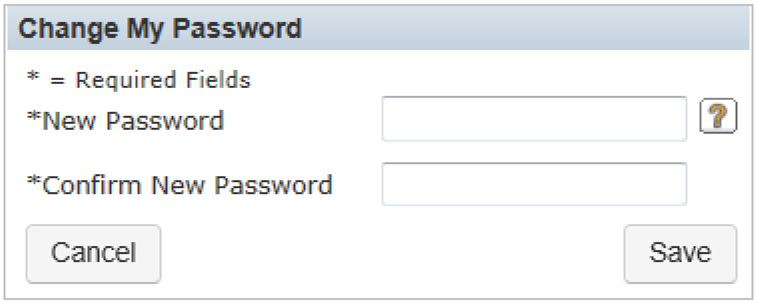
Logging in for the First Time



When you log in for the first time, you will be prompted to change your password as shown on the next page.

Changing Your Password

The “Change My Password” window shown below displays the first time you log into eBilling. Complete the following steps to change your password. Note: Your password should be considered personal and confidential.



1. Enter a new password that meets the following criteria:

Password Must Contain:	***Password Cannot:***
8-15 characters (special characters are permitted but not required)	Be the same as your previous password
At least one capital letter	Have more than two of the same characters in a row
At least one lower case letter	Contain your Username
At least one number	

2. Reenter your password in the Confirm New Password field.
3. Click **Save**.

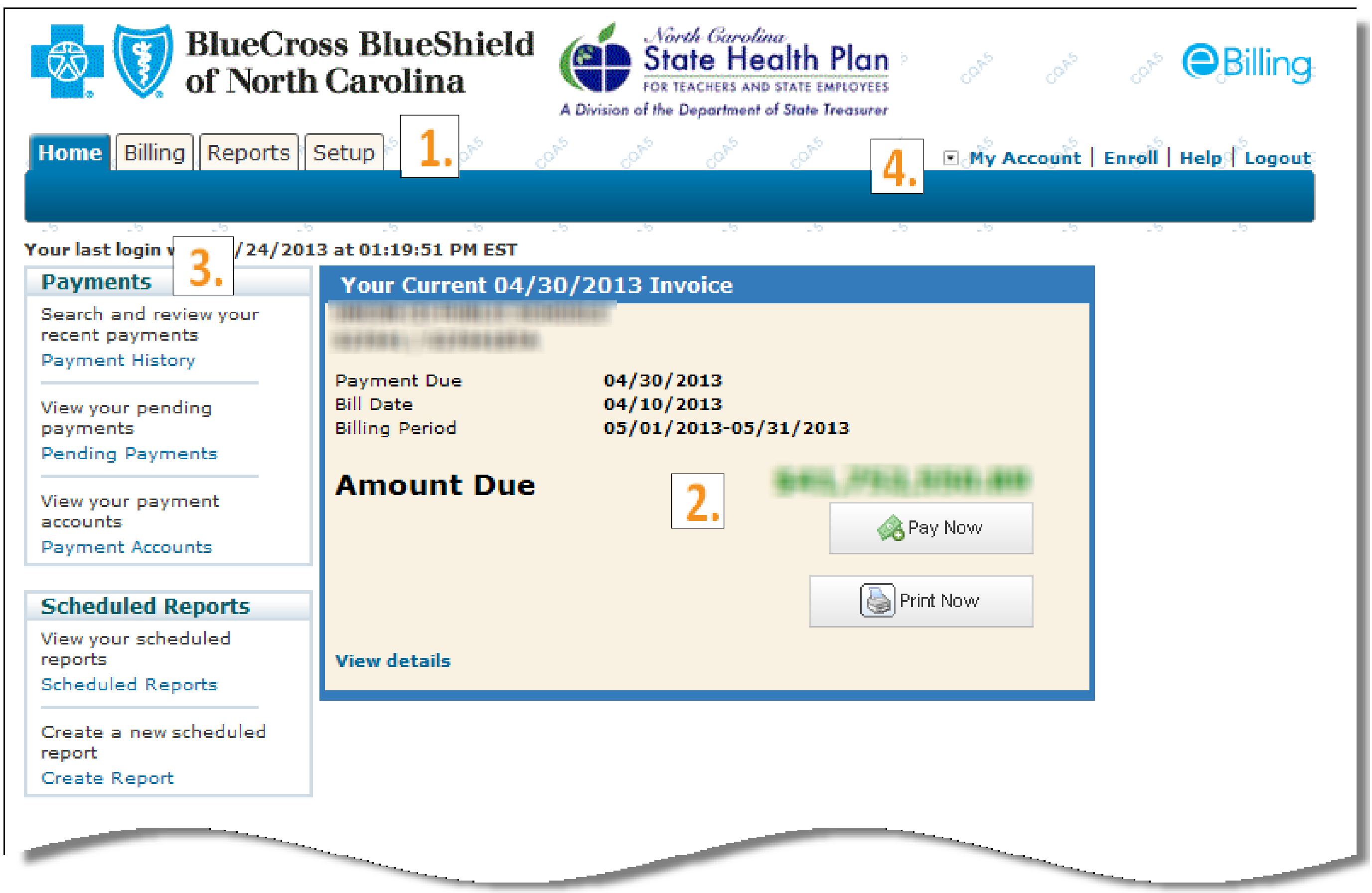
Note: After you have accessed eBilling once, you will not have to enter in this information again – a single sign on process through the Communications Portal will take you directly to the eBilling home page as shown on the next page of this guide when you click the eBilling link.

The eBilling Home Page

Once you log into the application, the eBilling Home page displays as shown below. The eBilling Home page is the center of the online billing system and allows access to the various tools available in the application.

The Home page includes these elements, which will be discussed in more detail later in this guide:

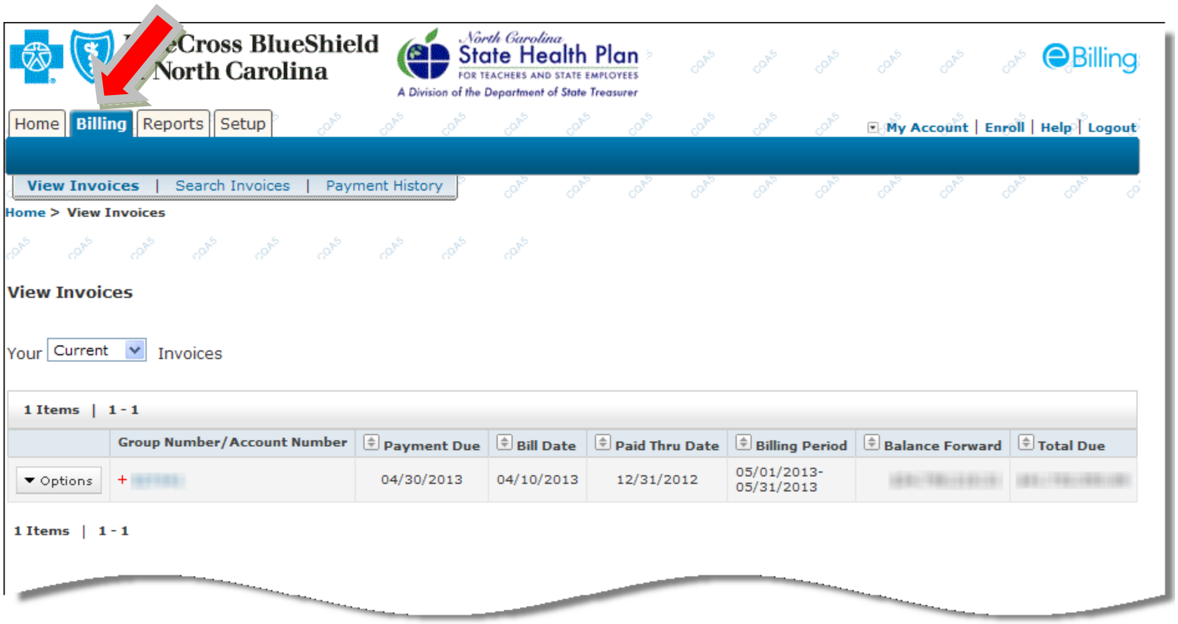
1. Tabs
2. Current Invoice Information
3. Left Navigation links
4. Quick links



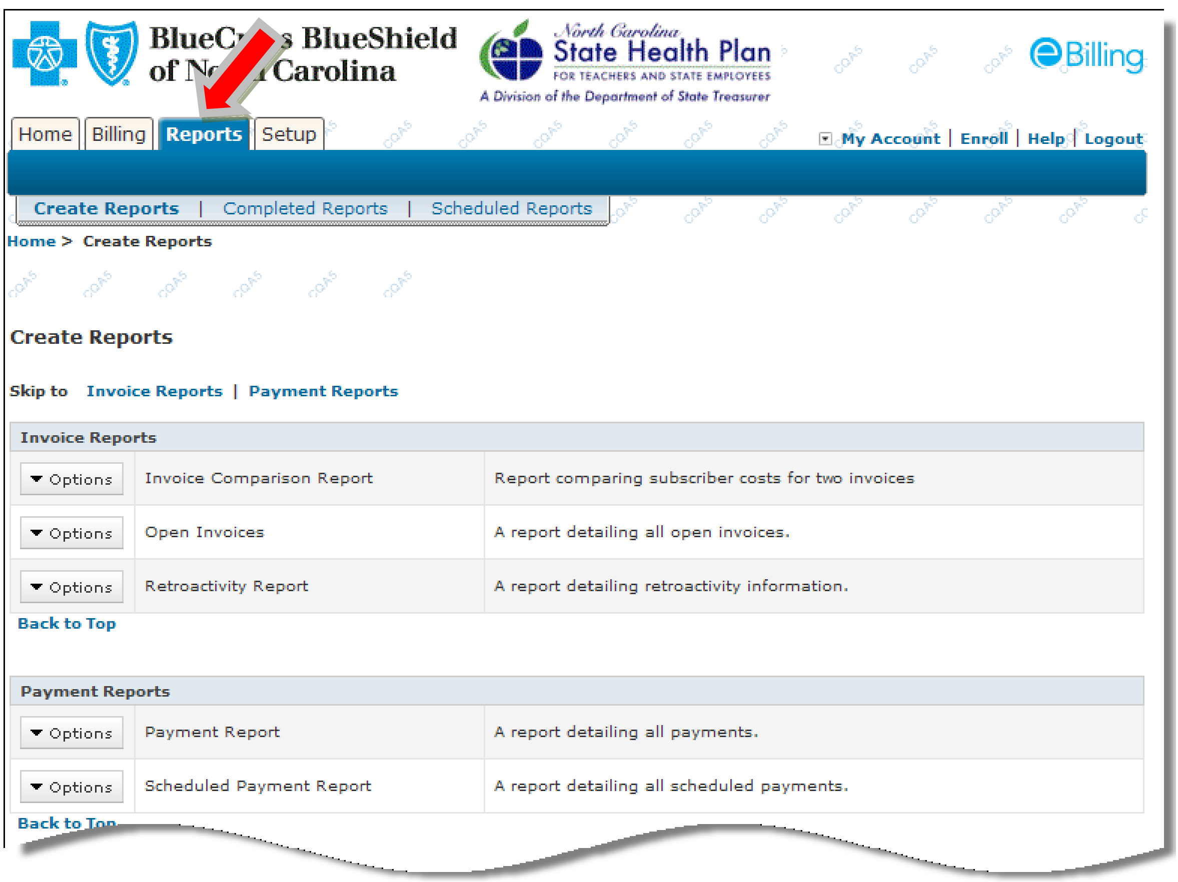
Tabs

At the top of the screen, four tabs display. The current tab is highlighted in blue. We will discuss the functions you can perform by accessing these tabs in further detail later in the guide.

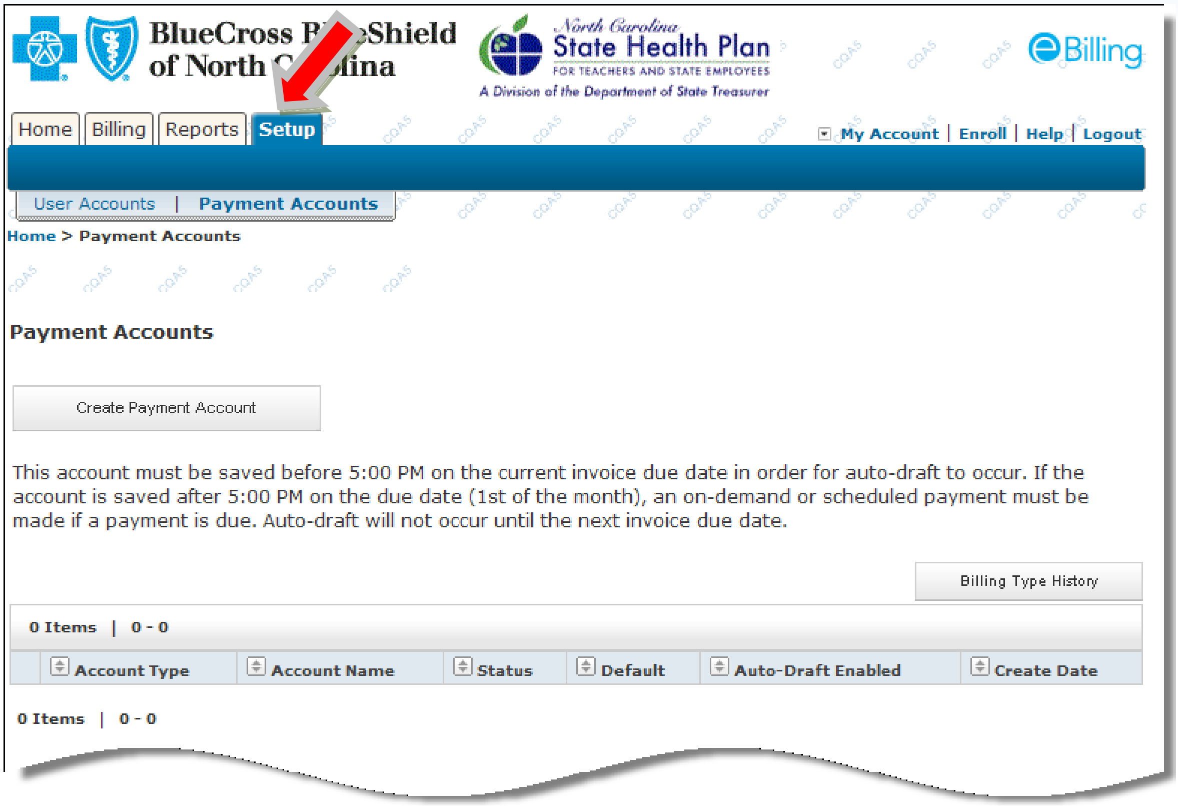
- Home: shown on the previous page.
- Billing: search and view current invoices, search for a specific invoice, and view payment history.



- Reports: create, view, and schedule reports.

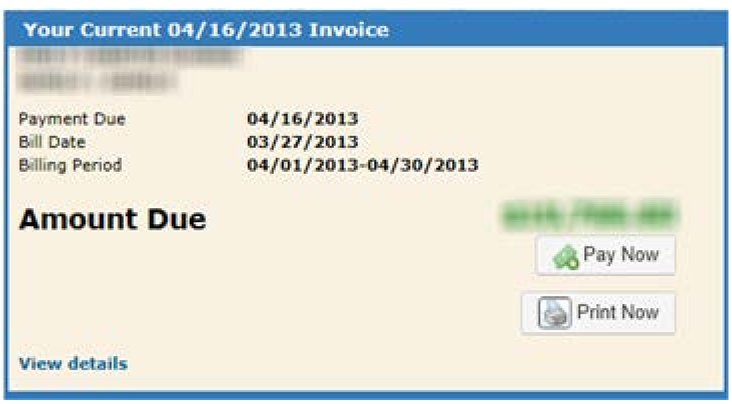


- Setup – set up and manage payment accounts.



Current Invoice Information

In the center of the eBilling Home page, current invoice information displays as shown below. From this area, you can see the amount due, pay the current amount due, or print the current invoice.



Important Note: Clicking "Print Now" anywhere in the application takes you to the Print Options screen where you can generate your invoice in a variety of formats. Once the invoice is generated, you may choose to save it to your computer and/or print it. Clicking the Print Now button is the way to create a downloadable version of the invoice. This is covered in more detail in the "Printing Invoices" section of this guide.

Left Navigation Pane

The left side of the eBilling Home page includes the following links:

Payments section:

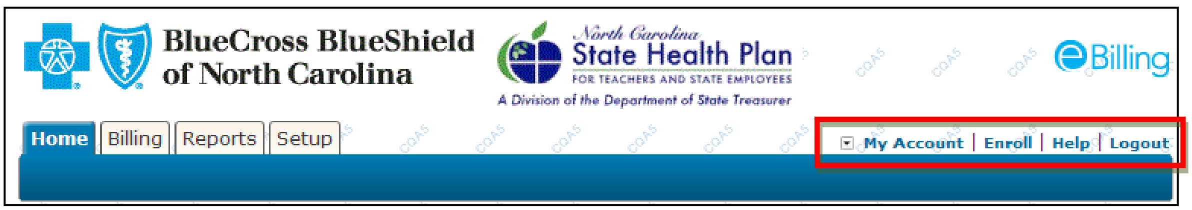
- Payment History
- Pending Payment
- Payment Account

Scheduled Report section:

- Scheduled Reports
- Create Report

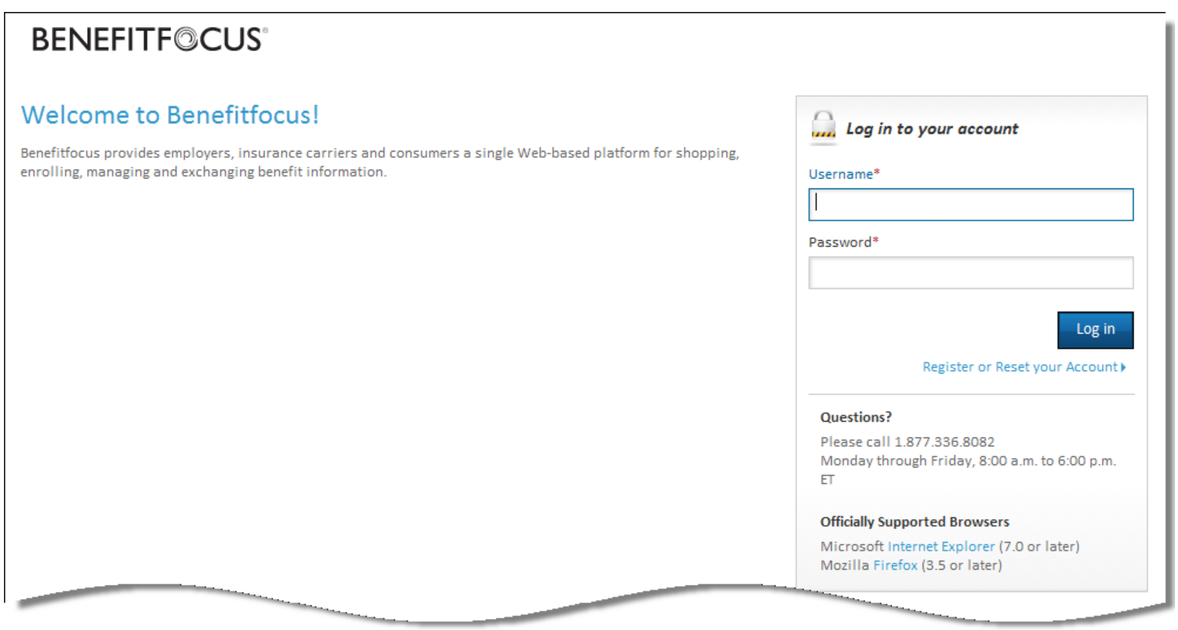
These functions will be discussed in later sections.

Quick Links

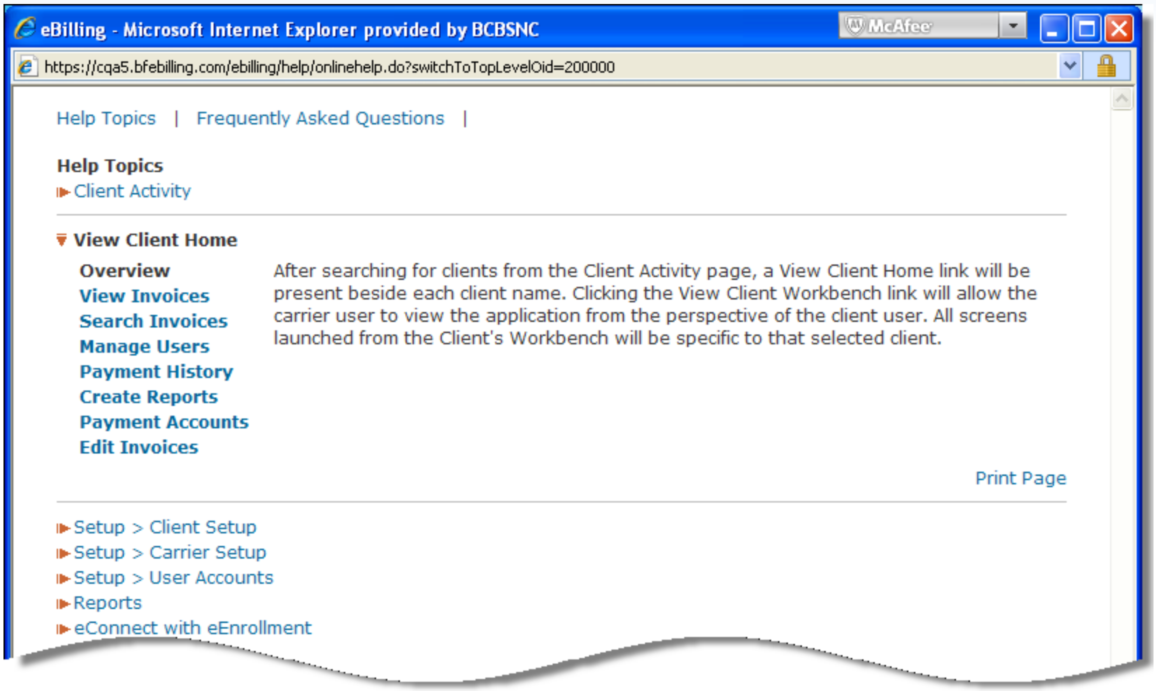


Located at the top right of all eBilling screens, the following links display:

- **My Account:** Change the system password, secret question and answer, and enter or update your e-mail address (shown on page 5 of this guide).
- **Enroll:** Click the link to go to the Benefitfocus enrollment website.



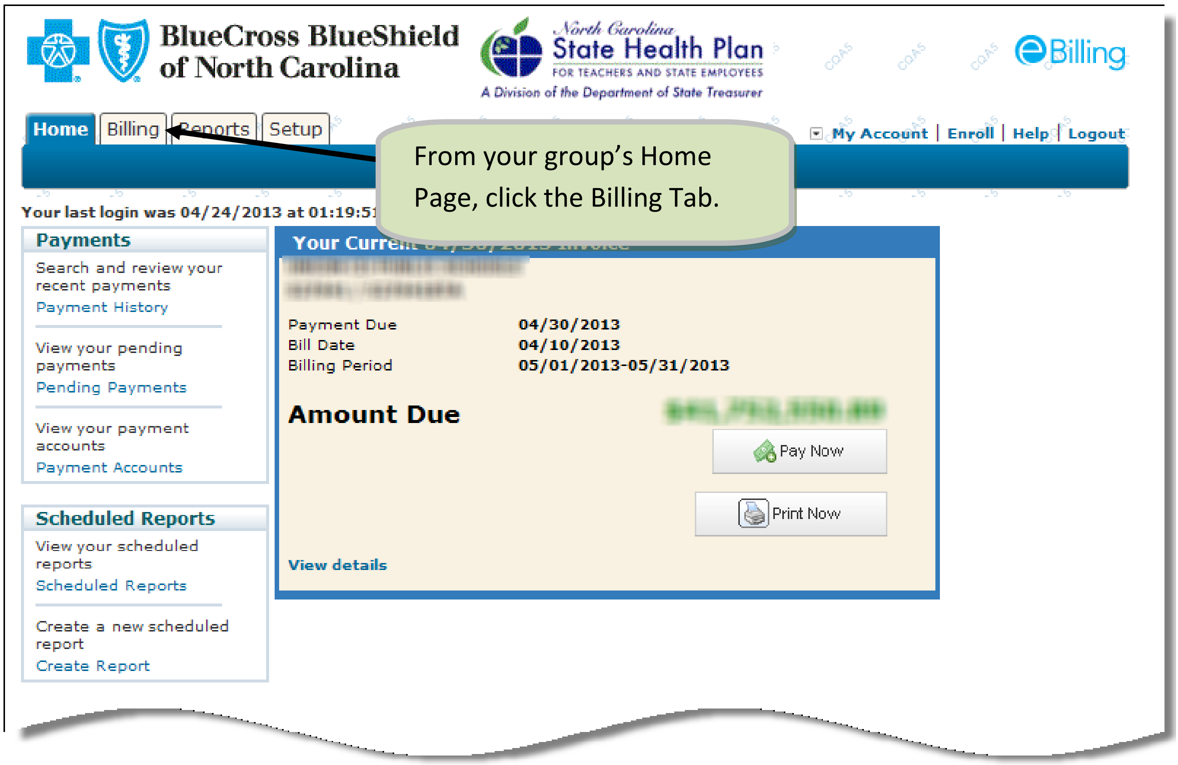
- **Help:** View help topics and frequently asked questions. Topics available depend on your access level.



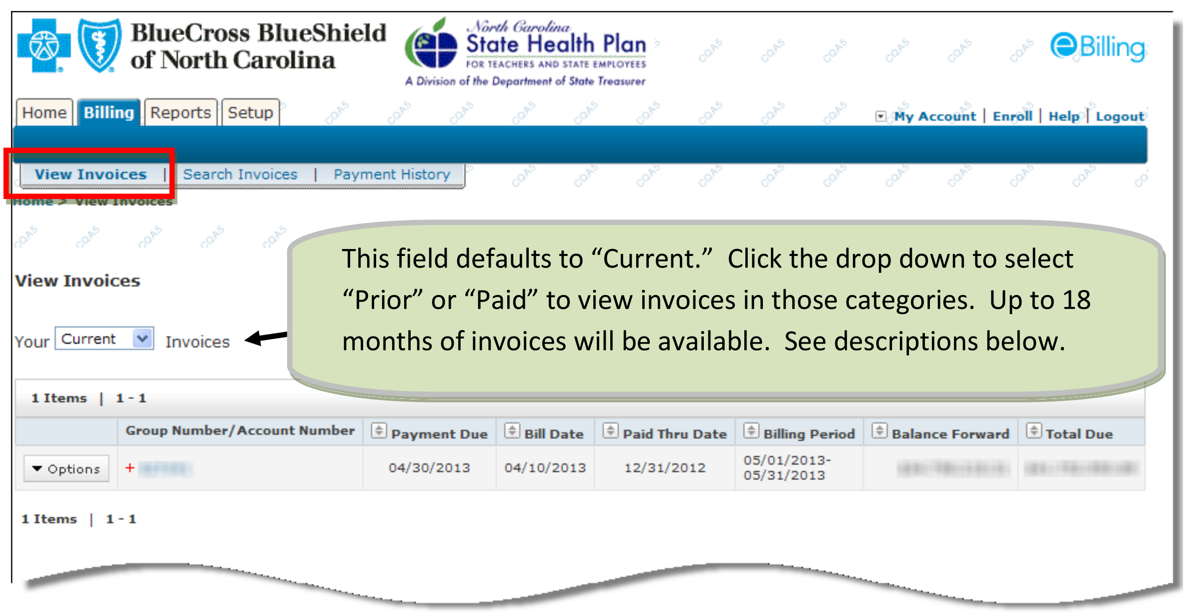
- **Logout:** Click the link to securely log out of the system. The Login screen show on page 4 of this guide displays.

Viewing Invoices

Complete the following steps to view your group's invoices.



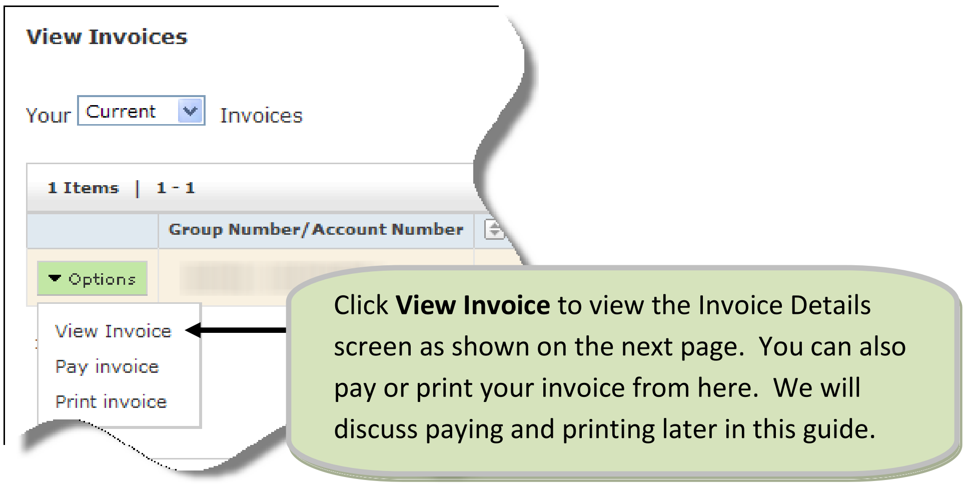
The Billing page displays with the View Invoices sub-tab selected as shown below.



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

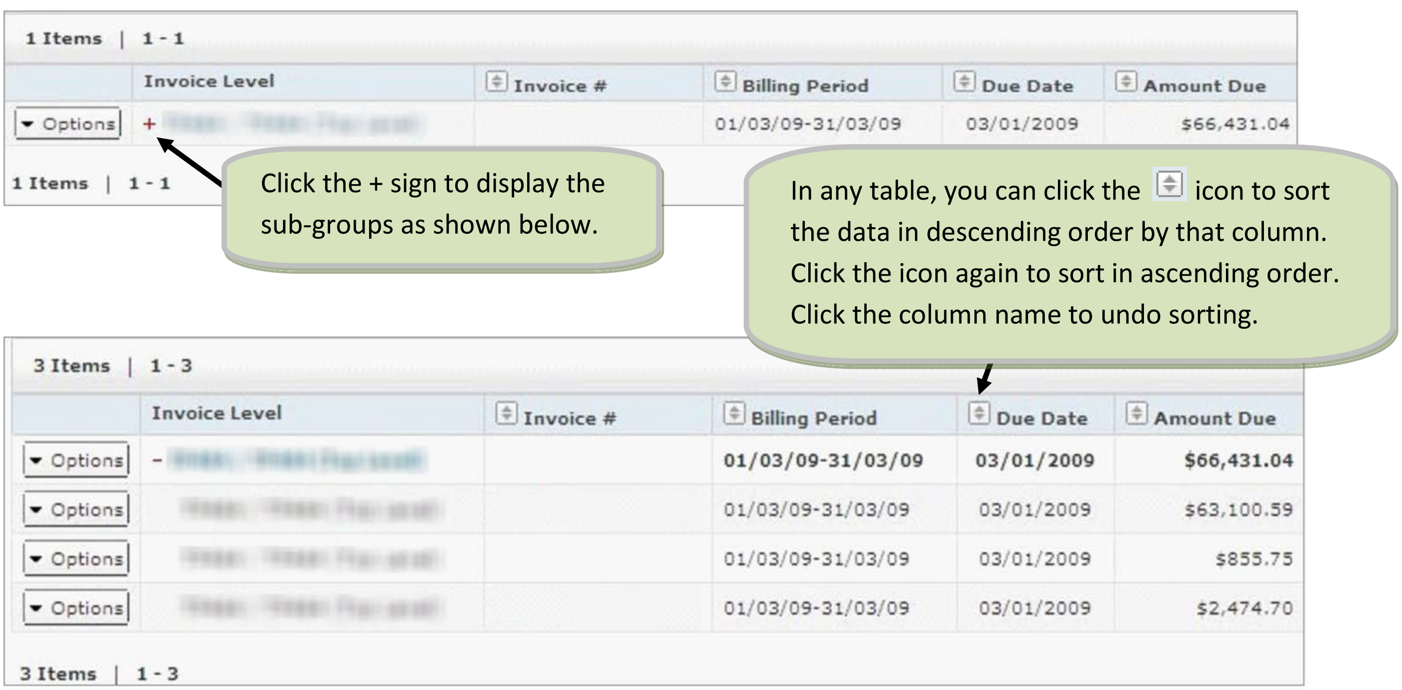
Viewing Invoice Details

The Options dropdown allows you to take further action regarding the account or sub-account.

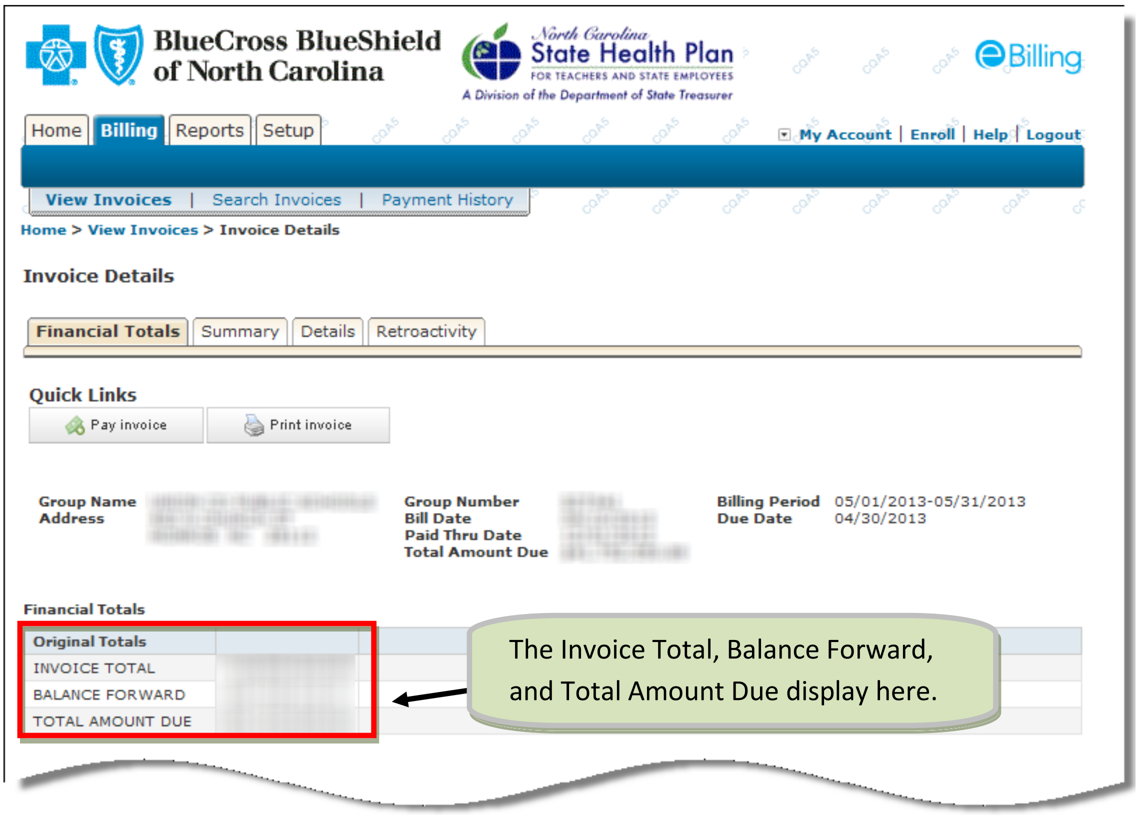


Consolidated and Sub-Group Invoices

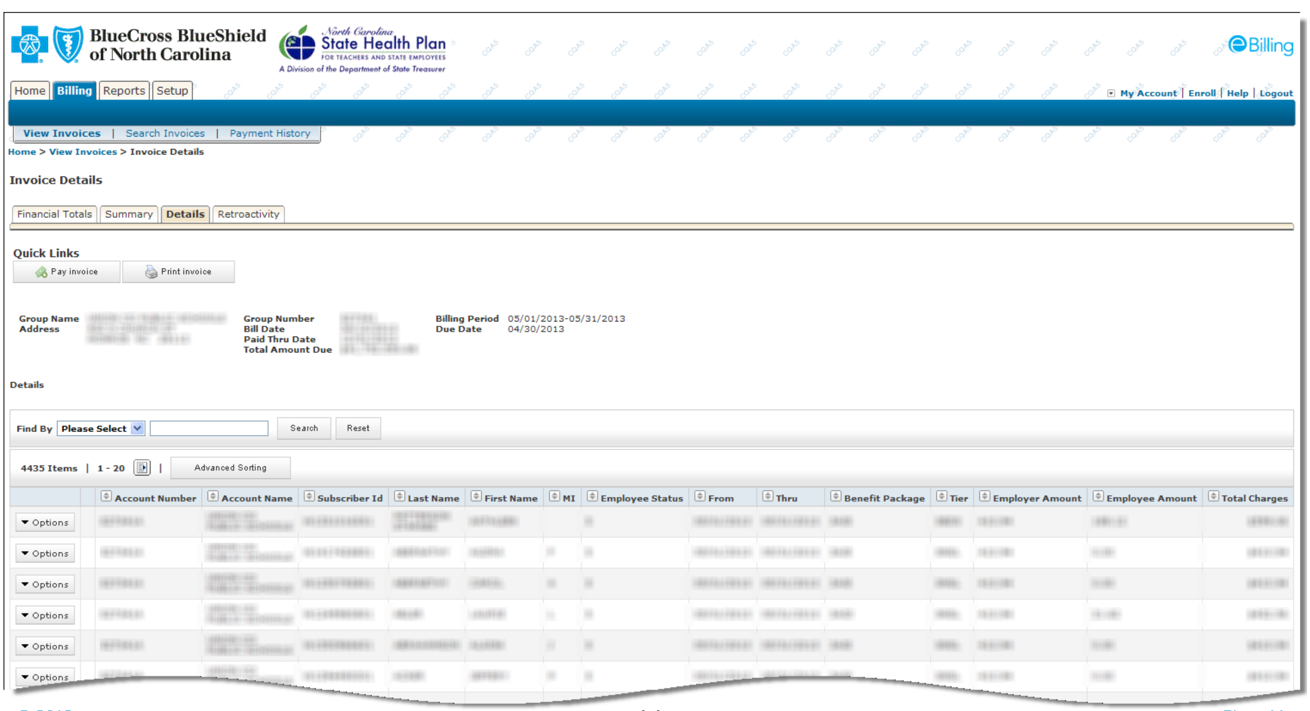
Consolidated invoices contain multiple sub-group invoices rolled into one overall group invoice. Invoices are consolidated for convenience and to display a summary of all of the invoices for a particular billing period. Consolidated invoices are denoted by a (+) sign by the invoice name.



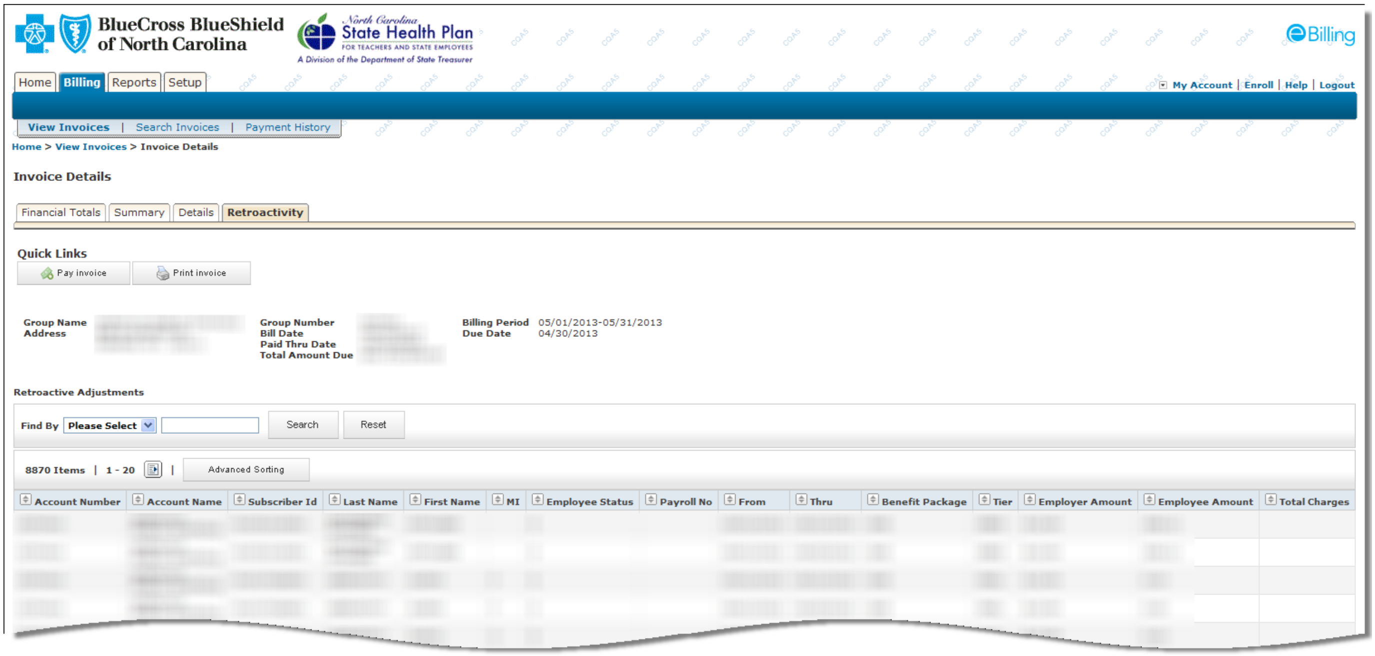
The Invoice Details screen displays with the **Financial Totals** tab selected as shown below.



The Details tab displays all the subscribers covered by the invoice. If your group as more than 2500 subscribers, they will not display here. Instead, you will see the message "The request yielded more than 2500 members so details are not displayed. To export all member records use the Print Invoice button or use the search criteria below to view members online." See "Printing Invoices" in this guide for more information.

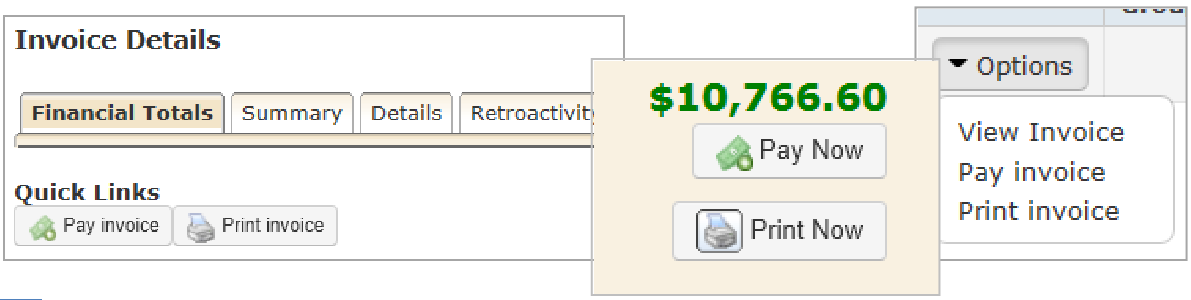


The Retroactivity tab displays a list of members who have billing activity applicable to a month other than the current month. For example, a member whose coverage level changed effective April 1st but the change was not reflected in the April invoice because it was not entered into the system until April 15th.



Paying Invoices

There are multiple ways to access the screens to pay invoices. You can select Pay Invoice from the home screen, Pay Invoice from the drop-down menu on the View Invoices screen (for both consolidated and non-consolidated invoices); or, you can select the Payment button on the Invoice Details screen.

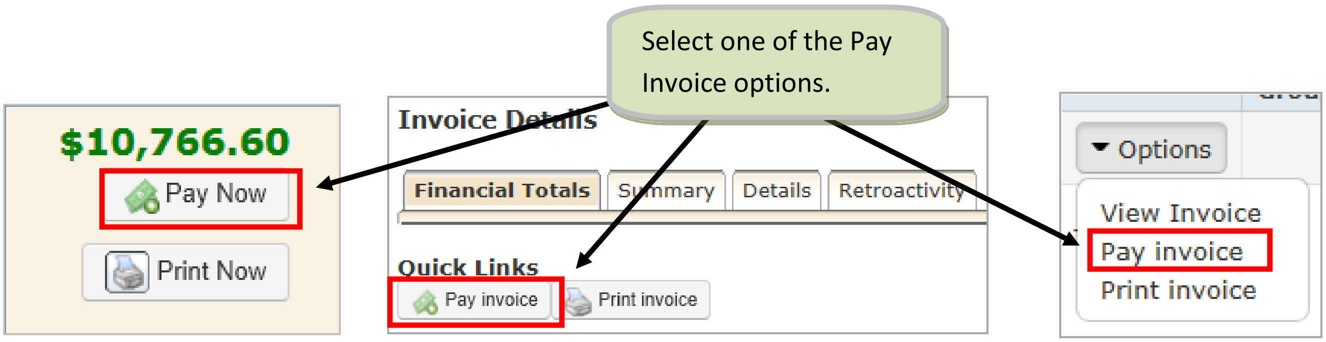


Important Reminders:

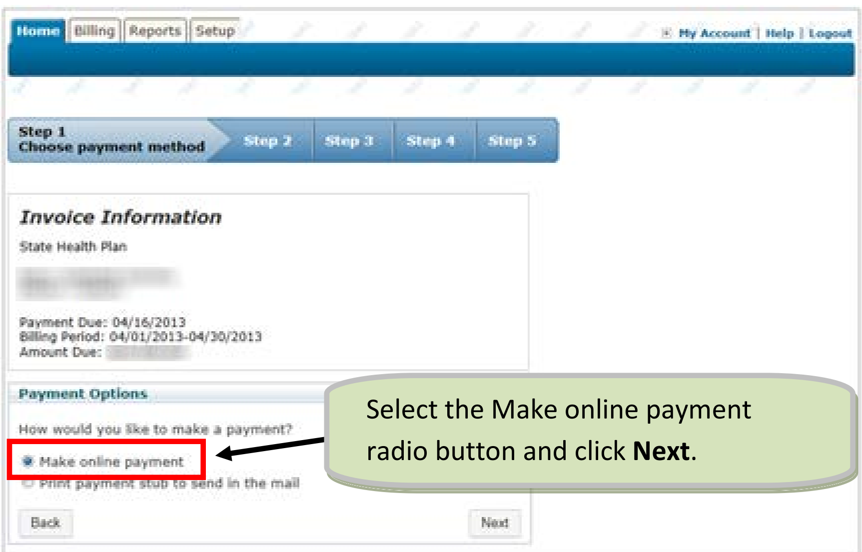
- Payments are always due on the first of the month, regardless of when the invoice is generated.
- The State Health Plan operates on a pre-pay basis. That means premiums paid on the first of the month (on May 1st, for example) are for that month (the coverage period May 1st – May 31st).
- The key to managing your group's premium is to maintain current eligibility and to manage any discrepancies in a timely manner using the tools available; for example, the Retroactivity tab and Invoice Comparison report in the eBilling tool as well as your payroll system.
- The longer a discrepancy goes uncorrected, the more difficult it becomes to identify.
- Failure to pay the total amount due by the payment due date will result in delinquency.
- Delinquencies are escalated as follows:
    - If the invoice is not paid by the end of the first week of the effective month, the delinquency is escalated to the primary HRB contact at the agency.
    - If the invoice is not paid by the end of the third week of the effective month, the delinquency is escalated to the Chief Financial Officer of the employing unit.
    - If the invoice is not paid by the end of the effective month, the delinquency is escalated to the Chief Financial Officer, Department of Public Instruction, UNC General Administration, and/or the North Carolina Community College's Division of Business and Finance.

Paying Invoices Electronically

Complete the following steps to pay your invoice.



The Step 1 Choose payment method window displays.



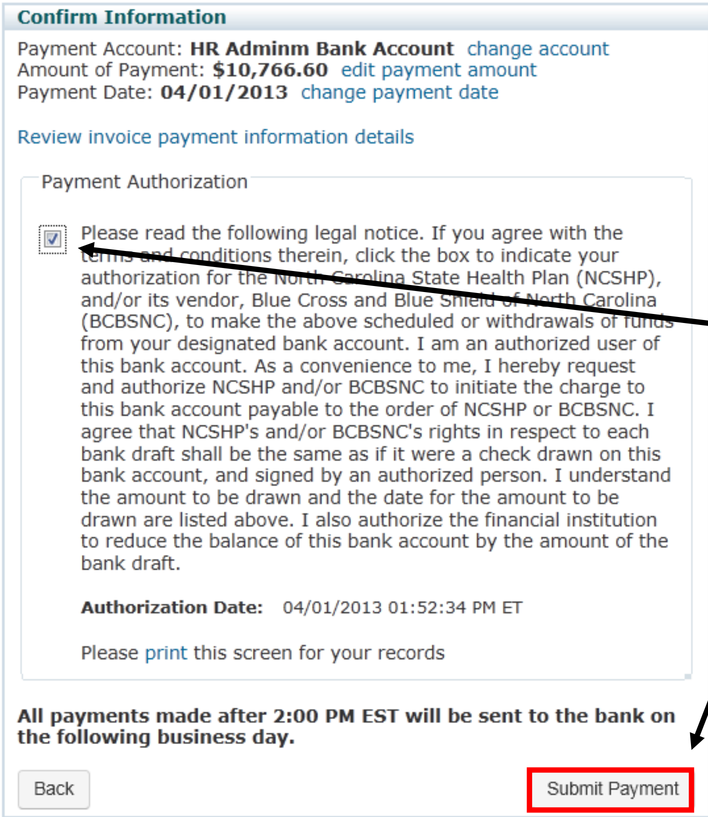
Depending on your permissions, you will see one of the following:

Step 2 Choose payment account… or Step 3 – Choose amount & date.

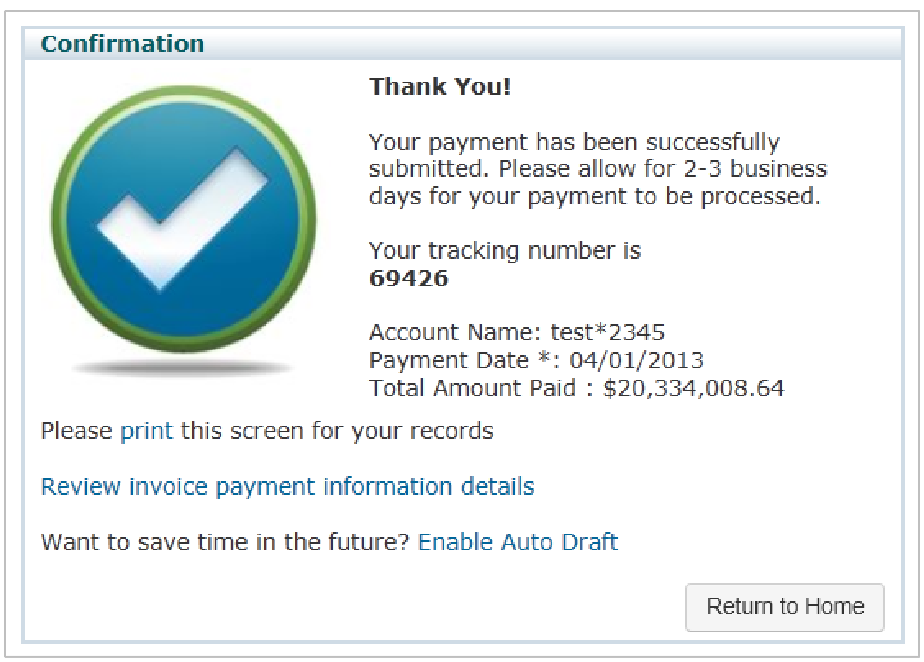
Payment options include:

- Total Amount Due – The total amount of the invoice will be paid from the designated account. This includes any previously unpaid balance forward amounts.
- Balance Forward – The total past due amount will be paid from the designated account.
- Updated Total Due – The total updated amount will be paid from the designated account. This displays when an amount other than the total amount due was applied after the invoice was generated.

Step 4 Confirm information displays as shown below.



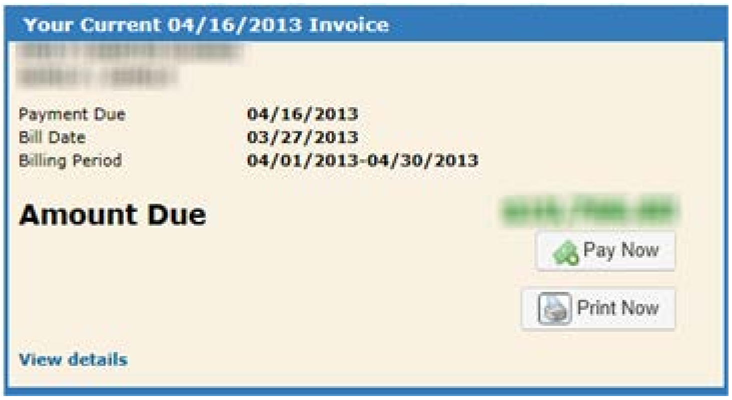
Review the transaction and acknowledge the payment authorization. When you are ready to finalize the payment, click **Submit Payment**.



The Confirmation window displays including a tracking number. You can print this page for your records.

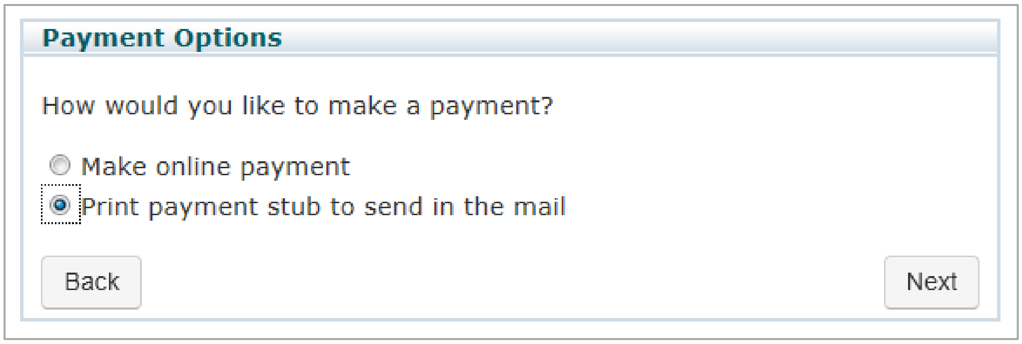
At the end of the day on the date of payment you selected, you will receive an email confirming that the payment has been submitted.

Important Note: After making a payment, when you return to the home page, you will still see the current invoice information as shown below. This "current invoice" information will continue to display on the home page for 2-3 business days until the payment is fully processed. ***Do not pay the invoice again!*** The payment will show as Pending until 5:00 p.m. on the business day the payment was initiated. You can access this information via the Pending Payments link on the left navigation pane of the home page. You can also use the tracking number provided in the confirmation message to search for payments as described on page 29 of this guide.



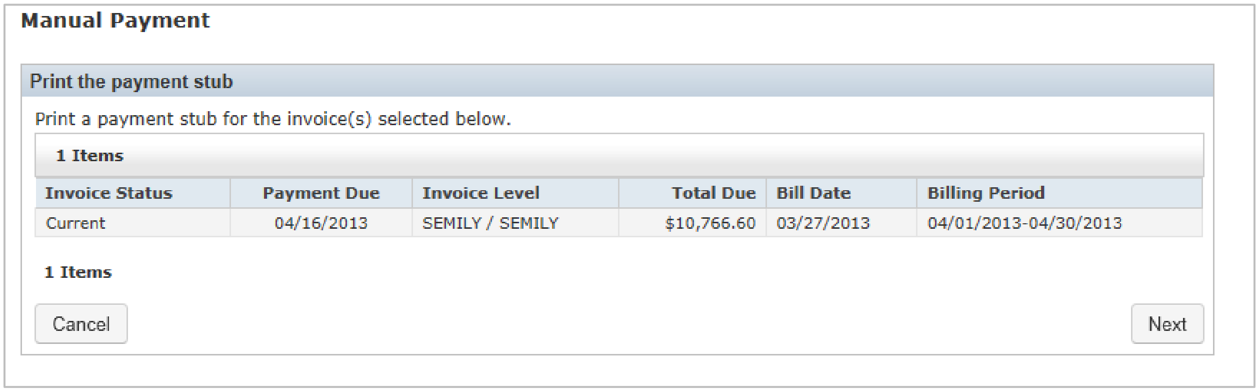
Paying Invoices Manually

1. Click the Print Payment Stub radio button from the Payment Options screen and Click **Next**.



2. If there are multiple invoices to choose from, select the invoice(s) you want to pay and Click **Next**. If there is only one invoice, just click **Next**.

Note: The **Total Due** for the **Current** invoice includes any unpaid balance forward amounts.



Manual Payment

Print the payment stub

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

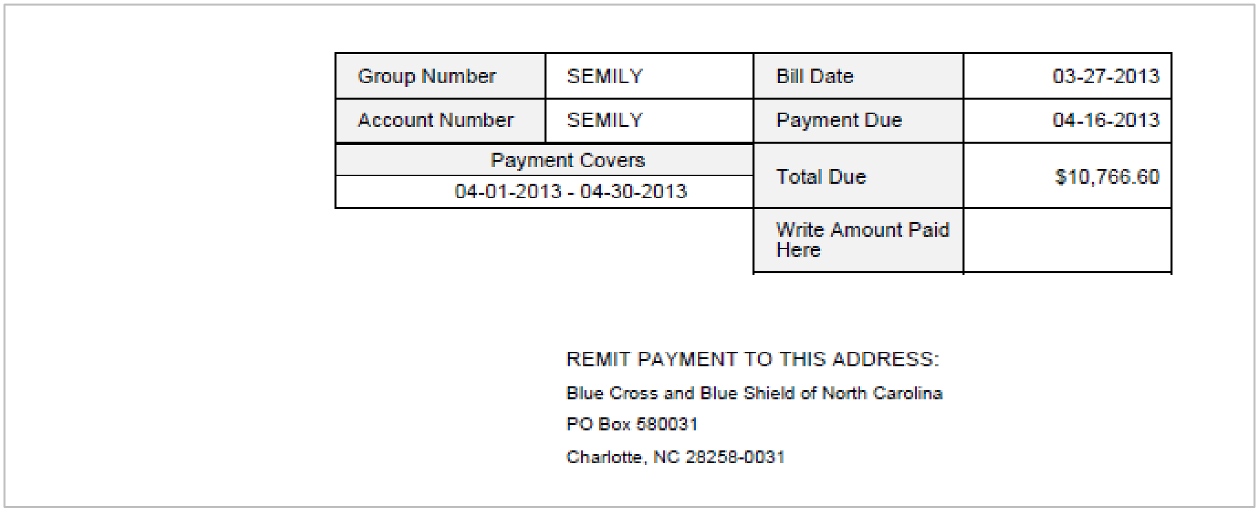
1 Items

Invoice Status	Payment Due	Invoice Level	Total Due	Bill Date	Billing Period
Current	04/16/2013	SEMILY / SEMILY	$10,766.60	03/27/2013	04/01/2013-04/30/2013

1 Items

Cancel Next

3. The invoice payment stub displays in a new window. Print the stub and submit it.



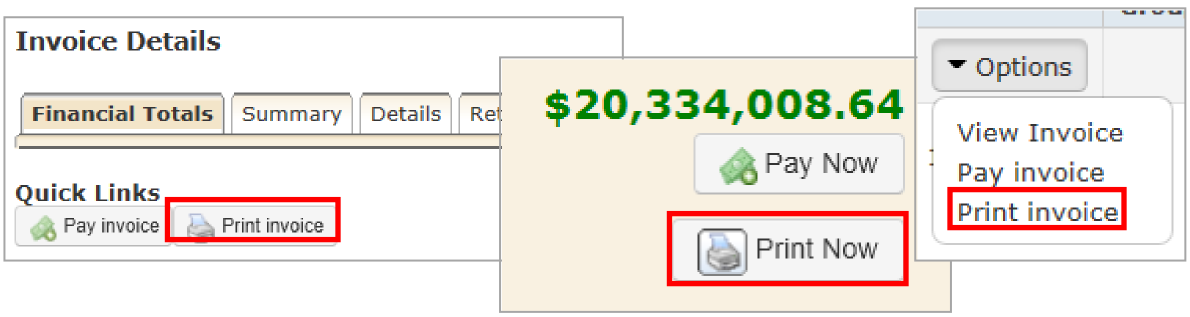
Group Number	SEMILY	Bill Date	03-27-2013
Account Number	SEMILY	Payment Due	04-16-2013
Payment Covers 04-01-2013 - 04-30-2013		Total Due	$10,766.60
		Write Amount Paid Here	

REMIT PAYMENT TO THIS ADDRESS:
Blue Cross and Blue Shield of North Carolina
PO Box 580031
Charlotte, NC 28258-0031

Printing Invoices

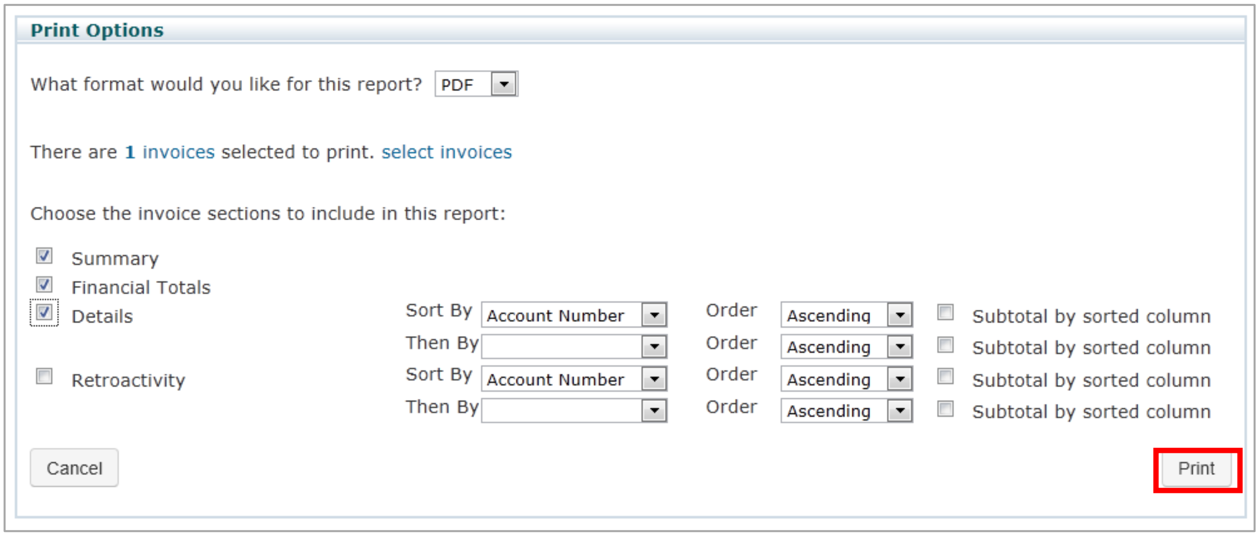
There are multiple ways to access the screens to print invoices. You can select Print Invoice from the Home screen, Print Invoice from the drop-down menu on the View Invoices screen (for both consolidated and non-consolidated invoices); or, you can select the Print icon on the Invoice Details page. You can print invoices in PDF format or as comma-separated value (CSV) files (which can be opened in Microsoft Excel, for example). An HTML format is also available to either view in your web browser or to print.

Important Note: Clicking "Print Now" anywhere in the application takes you to the Print Options screen where you can generate your invoice in a variety of formats. Once the invoice is generated, you may choose to save it to your computer and/or print it. Clicking the Print Now button is the way to create a downloadable version of the invoice.



Regardless of where you select to print invoices, the Print Options screen opens. You can print complete invoices or sections from the invoices and specify the invoices to print (if you selected the consolidated view). All invoices with a Current, Prior, and Paid status can be printed and exported.

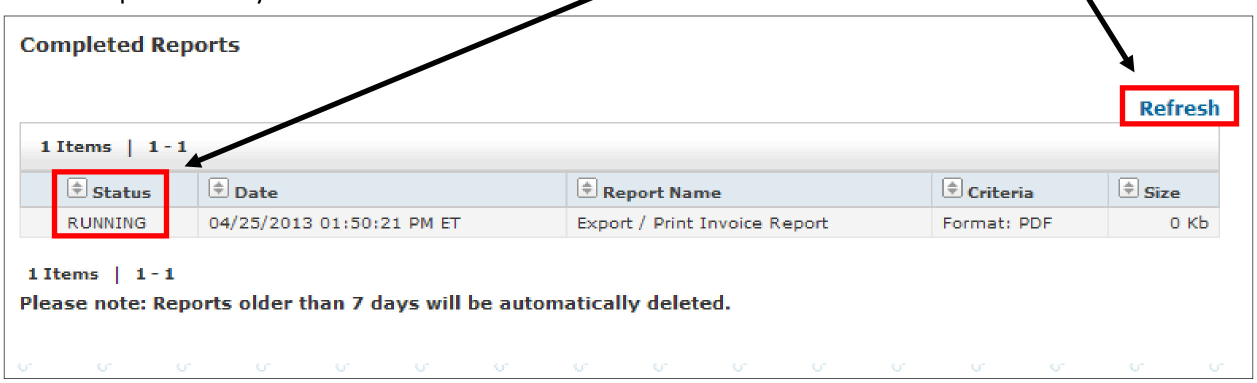
1. After accessing the Print Invoice screen, select the type of format* you want to print and, if there are multiple invoices, select the invoice(s) to print and select the sorting order for each selection. Then click **Print** to generate the report.



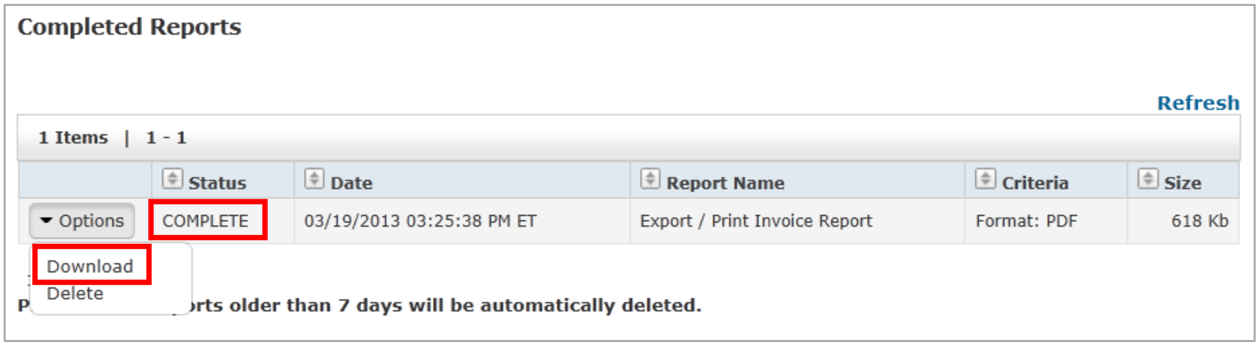
* ***Note about formats:*** The following guidelines can assist you in choosing the best output format for your purposes:

- CSV: best for sorting and manipulating data as well as exporting into other applications.
- PDF: best for printing
- HTML: best for viewing information online when printing is not needed

2. While the invoice is generating, the status displays, "Running" as shown below. Depending on the size and complexity of the report, it may take a few moments to generate the results. Click **Refresh** to determine if the report is ready to be downloaded.



3. Once the report is available, the status changes to **Complete**. Select **Download** from the drop-down menu to generate the report in the format you selected.



Email Notifications

Email addresses are collected as part of the registration process for HBRs with billing access. It is important to register new users promptly when billing personnel at your agency changes to ensure these email notifications are received.

You will receive email notifications for the following scenarios:

- New Invoice: alerts you when new invoices are available for you to view.
- Online Payment: alerts you when an online payment has been made in eBilling.
- Returned Payment: alerts you when your payment has been returned from its bank.
- Delinquency (Warning): notifies you that your account has reached the first stage of delinquency due to unpaid premiums.

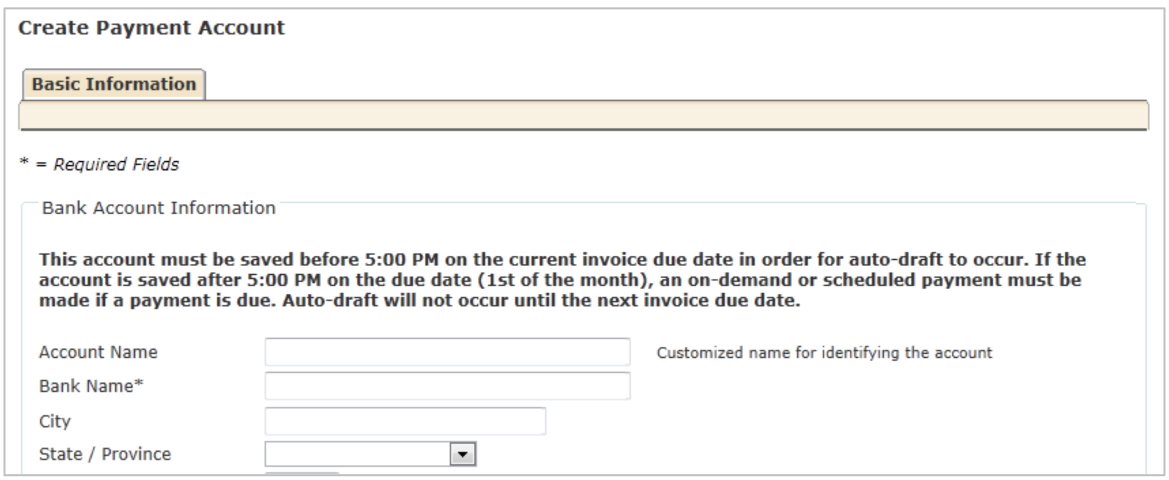
Viewing, Creating, and Editing Payment Accounts

Creating/Editing Bank Accounts

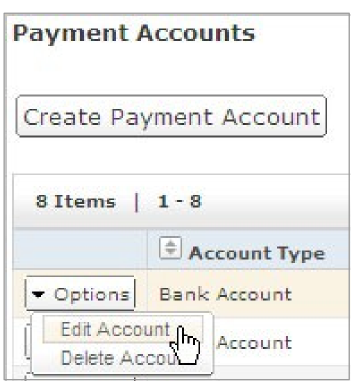
1. Select Payment Accounts from the Setup tab to add and edit all accounts used to pay invoices online.

2. To create a new bank account, go to Step 2a. To edit a current account, go to Step 2c.
   a. Select Create Payment Account at the top of the Payment Accounts page to display the Account Information tab.

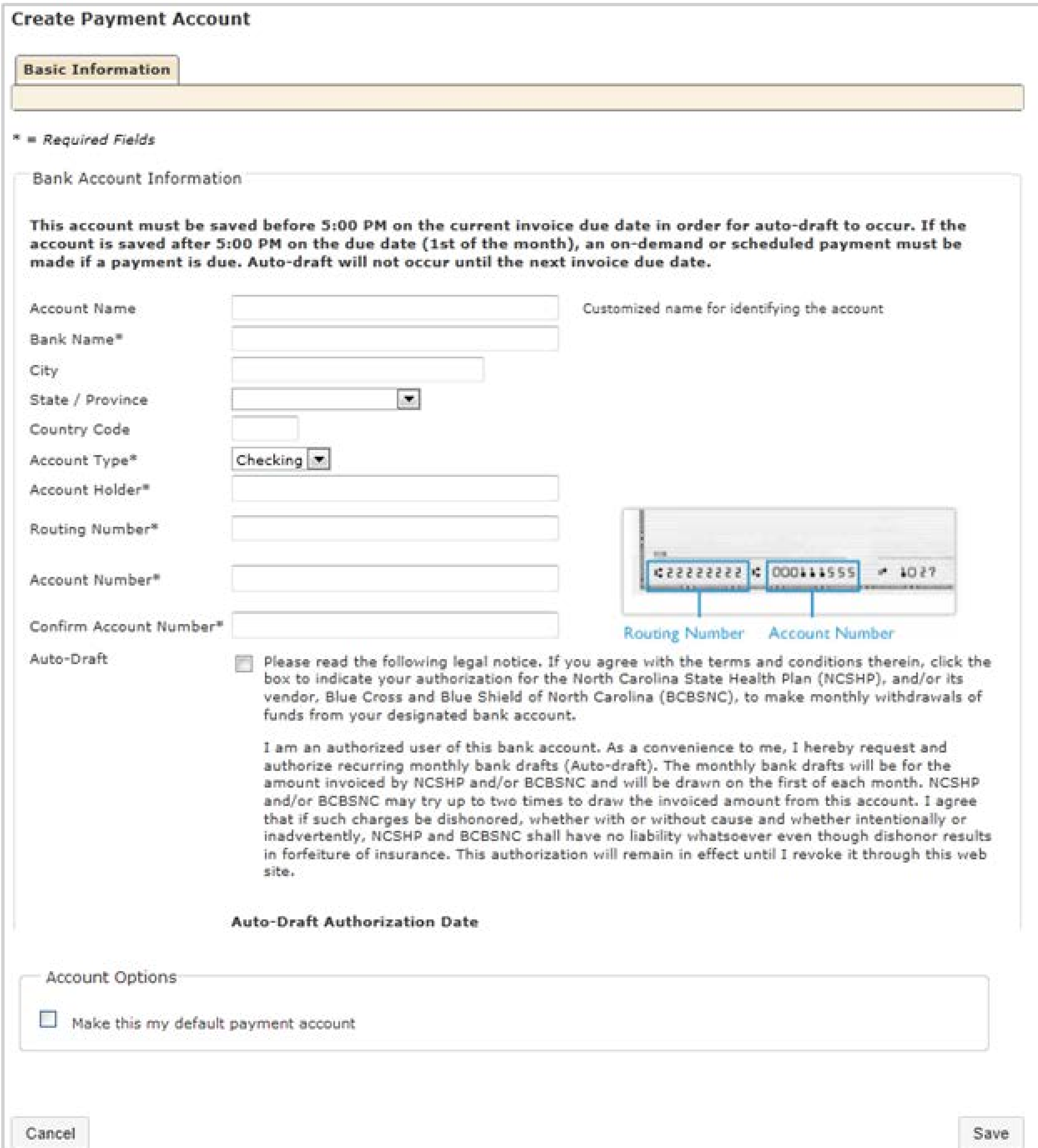
   b. Enter all required Bank Account information.



   c. Select Edit Account from the drop-down menu for any account you need to update; the Account Information tab displays the current account information.



3. Enter/Edit account information (required fields are indicated with *) on the Account Information tab.



If this will be the default account for making payments for your group, check the “Make this my default payment account” checkbox. When you have entered all information, click **Save** to finish creating the account.

Reviewing Payment Accounts Audit Data

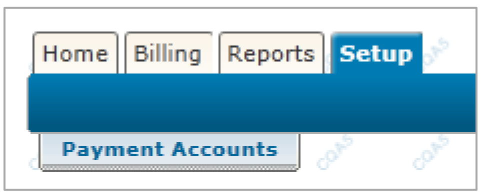
The Payment Accounts tab features an Audit History. Both carrier and client users (with security access) will have access to view this information.

When users edit a payment account, they will be able to select the History button to view:

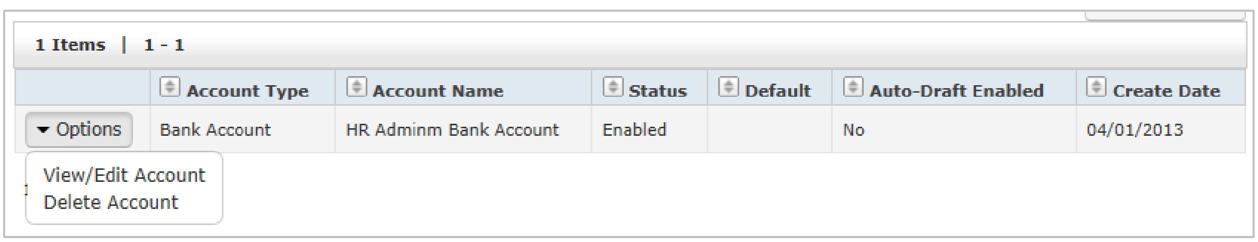
- The Login ID of the last person to make changes
- The date and time of the last change made to a payment account

To see the history for any available payment account:

1. Select Payment Accounts from the Setup tab to add and edit all accounts used to pay invoices online.

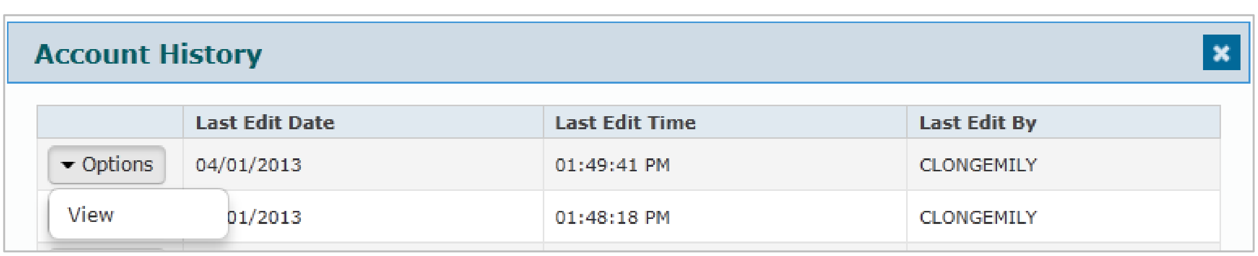


2. Select Edit Account from the drop-down menu.

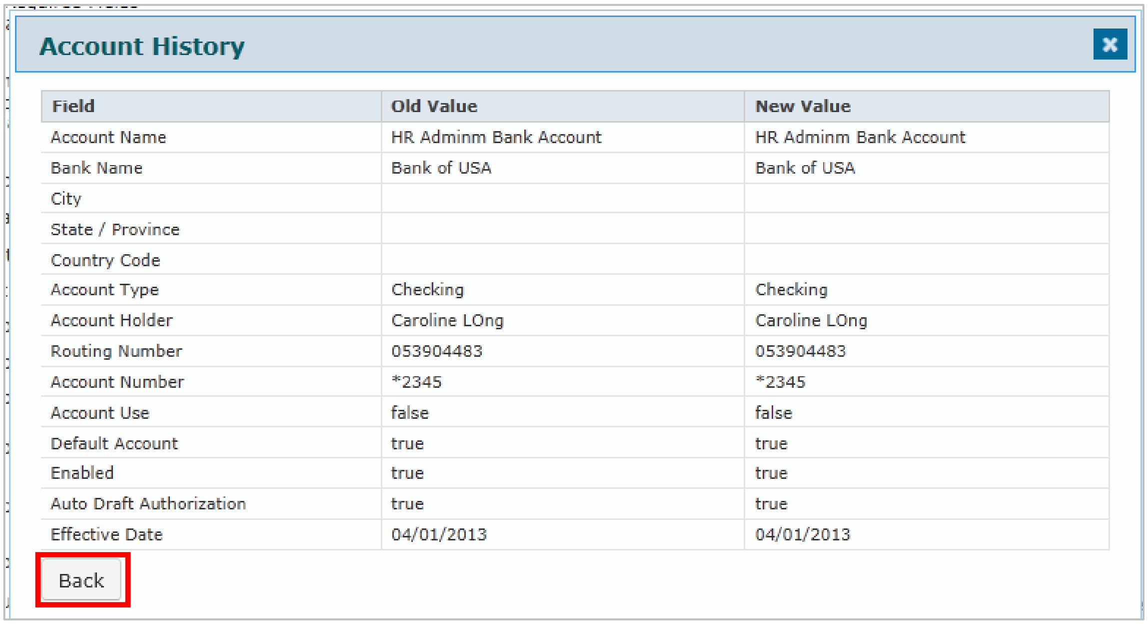


3. Select the History button at the top right of the screen.

4. Select View from the drop-down menu for the record.



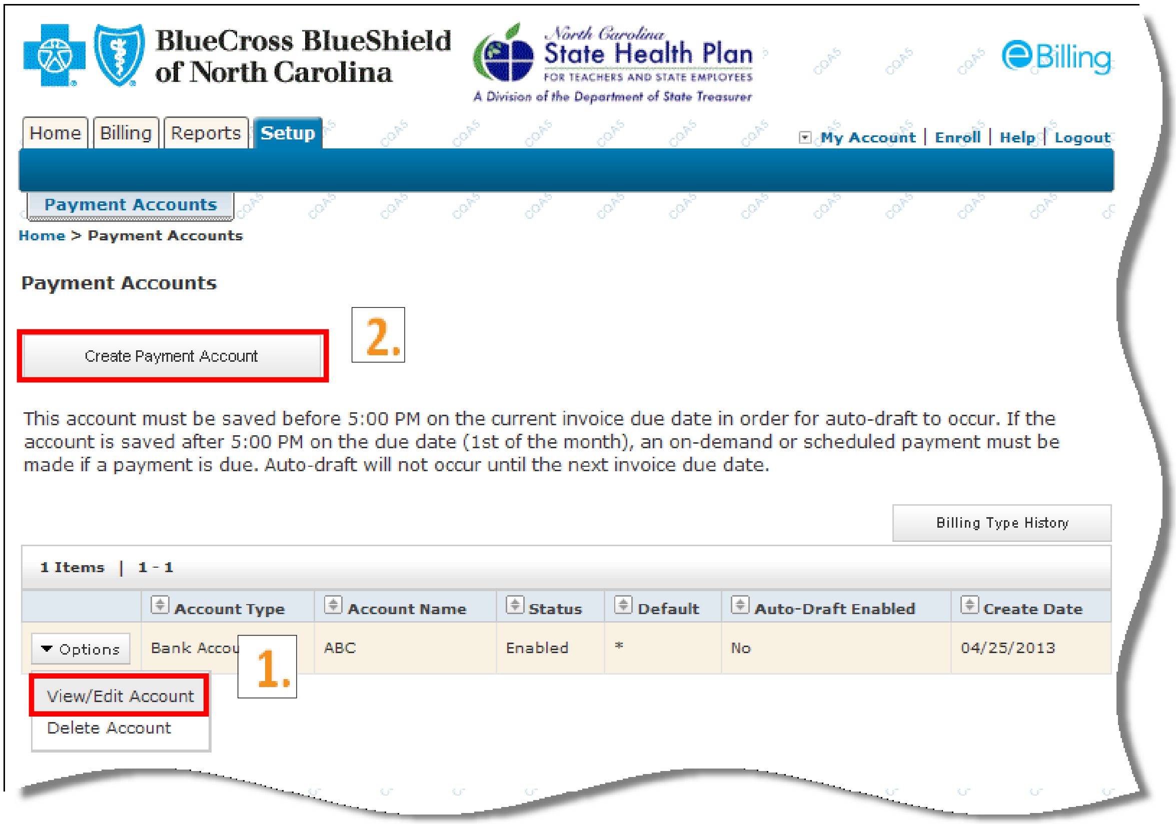
5. Select Back to review other records for this account, or select Close Window to return to the Edit Account Payment screen.



Field	Old Value	New Value
Account Name	HR Adminm Bank Account	HR Adminm Bank Account
Bank Name	Bank of USA	Bank of USA
City		
State / Province		
Country Code		
Account Type	Checking	Checking
Account Holder	Caroline LOng	Caroline LOng
Routing Number	053904483	053904483
Account Number	*2345	*2345
Account Use	false	false
Default Account	true	true
Enabled	true	true
Auto Draft Authorization	true	true
Effective Date	04/01/2013	04/01/2013

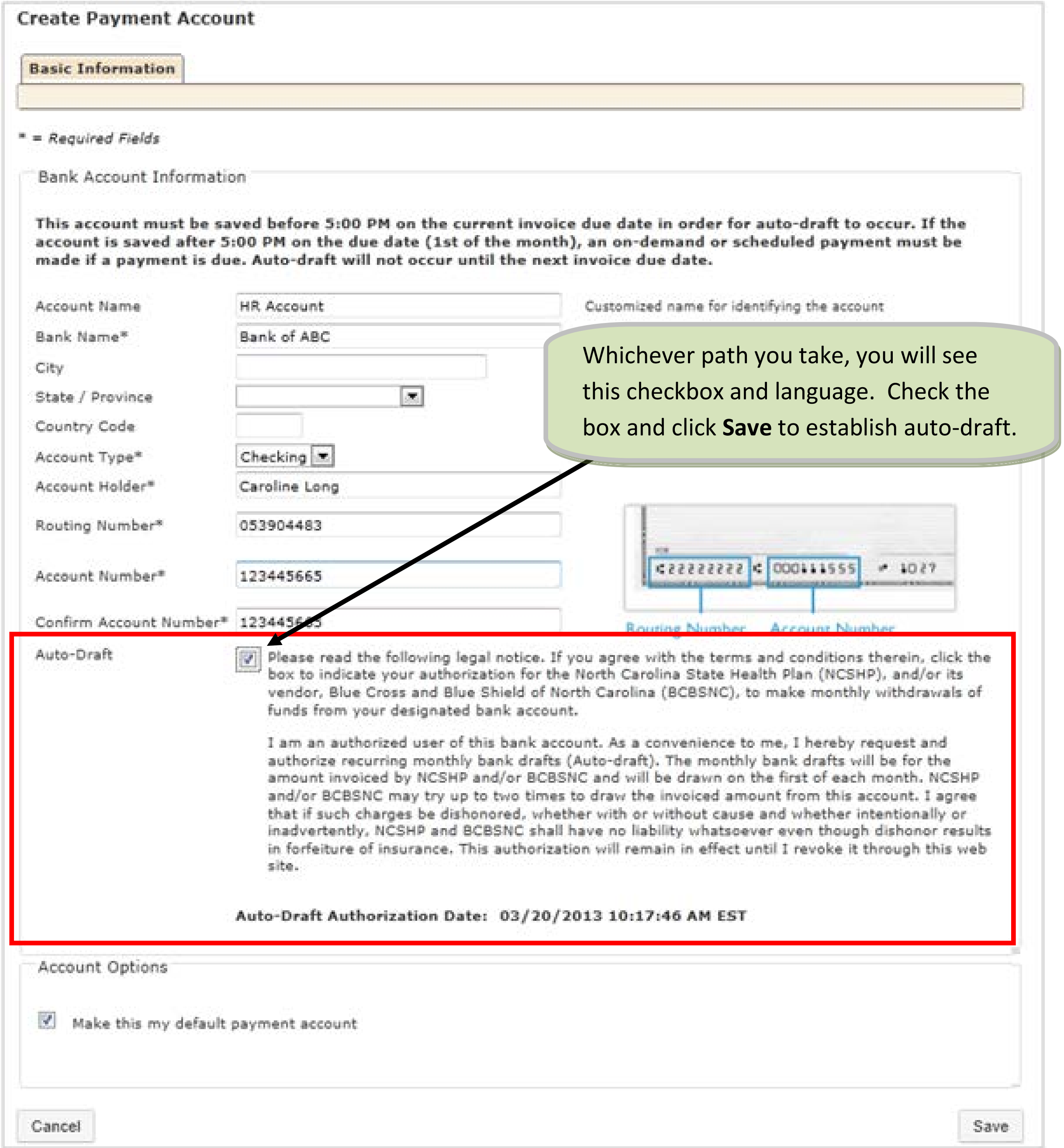
Auto Draft

There are several ways to set up automatic drafts depending on your permissions:



1. For an existing payment account, go to the Setup tab, then click View/Edit Account as shown below.
2. Set up a new payment account by accessing the Setup tab and clicking Create Payment Account.

3. Complete the fields of the Create Payment Account screen.



Notes:

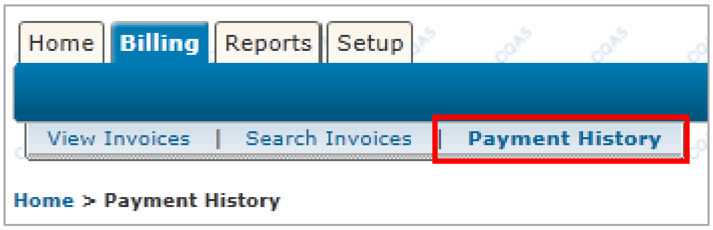
- Auto-draft will be effective the date it is authorized.
- Once auto-draft is enabled, your group's Total Amount Due will be automatically drafted on the first of each month for the upcoming month. For example, the payment automatically drafted on May 1st covers the billing period May 1-May 31.
- To turn off auto-draft, just repeat the steps to access the auto-draft option, uncheck the box, and click **Save**.
- To view whether an account is set up for auto-draft, refer to Reviewing Payment Accounts Audit Data in this guide.

Viewing Payment History

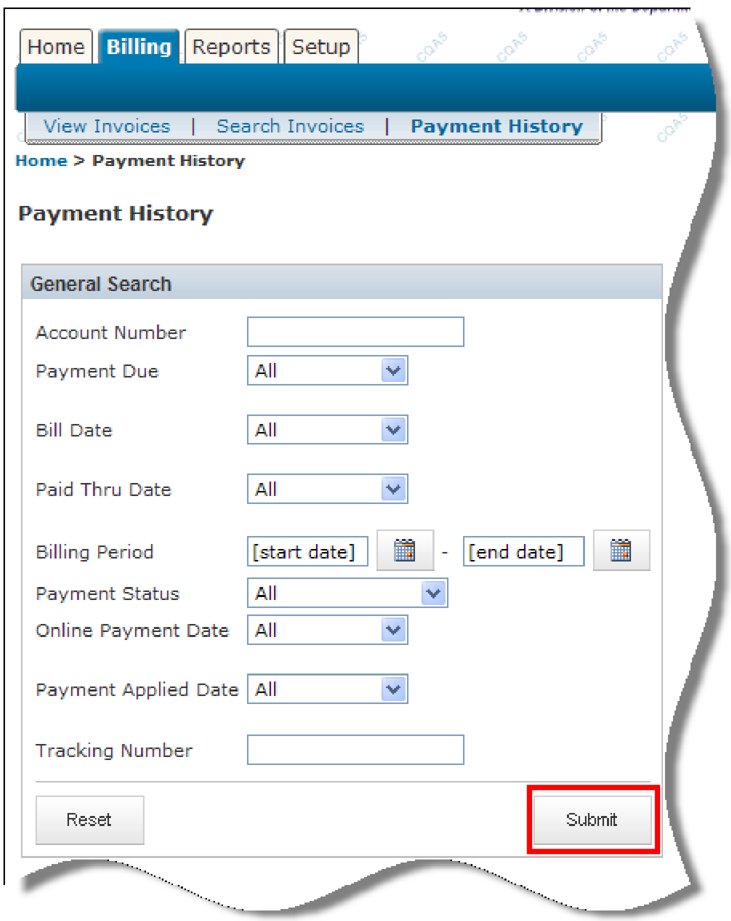
Searching for Payments

Perform the following procedure to search for a payment.

1. Select Payment History from the Billing tab to display the Payments search page.



2. Enter search criteria and select **Submit**.



3. Search Results display as shown below.

Search Results

2 Items | 1 - 2 | Advanced Sorting | Search Criteria

Invoice #	Received Date	Due Date	Description	Activity	Issued Date	Paid Amount
		03/01/2005		Error	02/15/2005	$2,474.70
		03/01/2005		Payment Pending	02/15/2005	$855.75

2 Items | 1 - 2

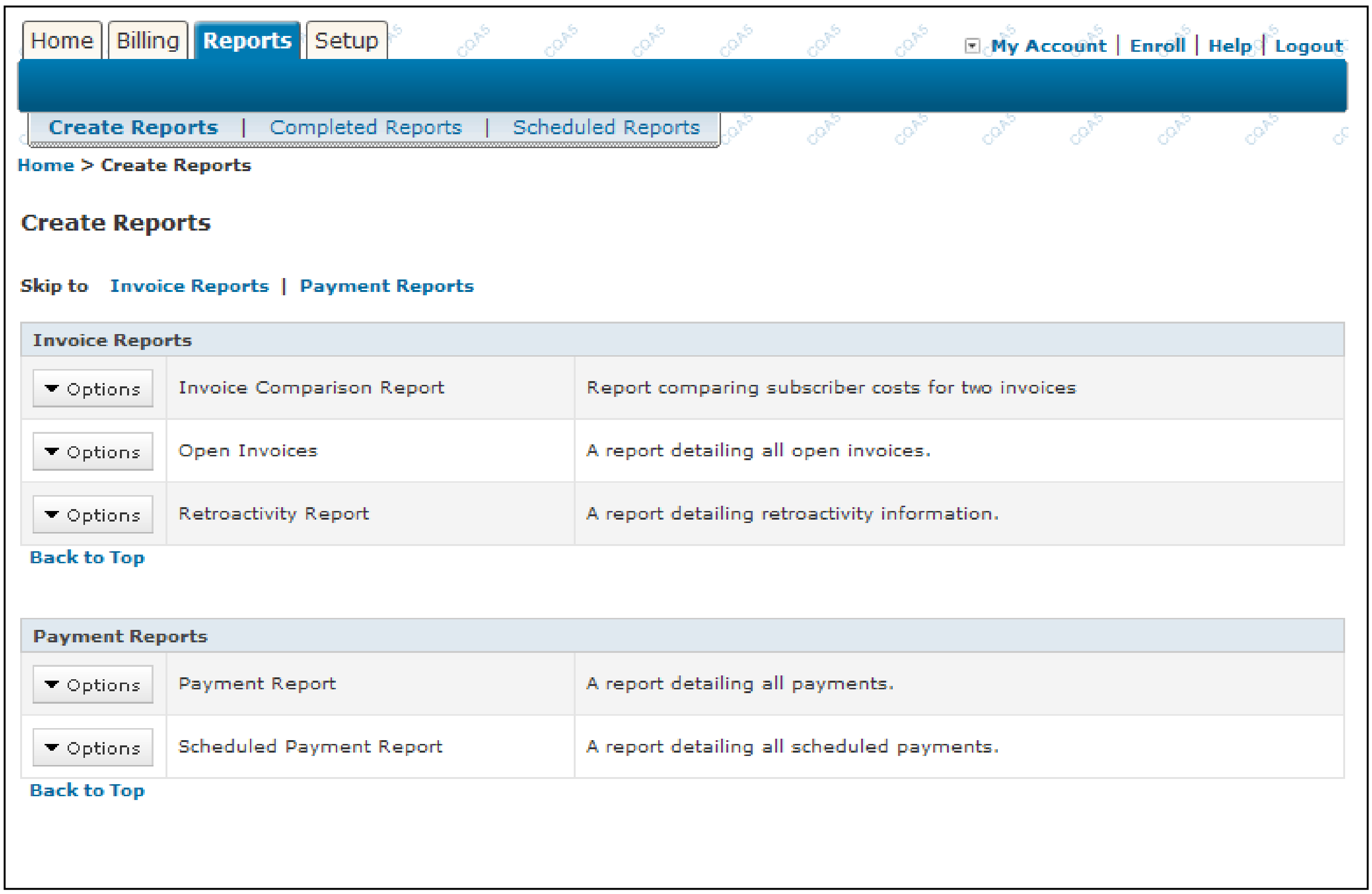
In any table, you can click the icon to sort the data in descending order by that column. Click the icon again to sort in ascending order. Click the column name to undo sorting.

Creating and Reviewing Reports

You can generate information for specific invoice reports and payment reports. Once generated, reports can be downloaded (saved to your computer) and/or printed.

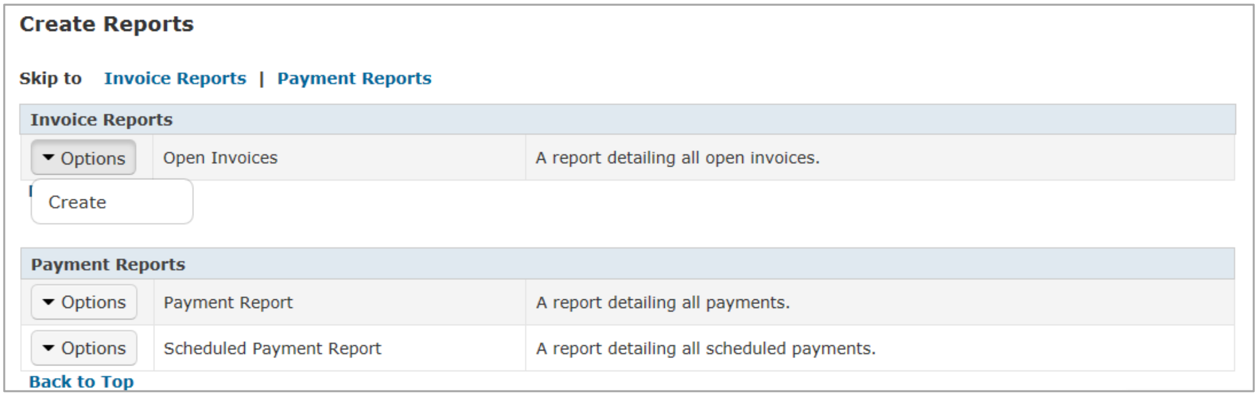
The Reports tab contains 3 sub-tabs:

- The Create Reports tab displays all available reports. Each report has search criteria and report format (PDF or CSV, for example). You can create a one-time report or schedule reports to run at specific time intervals.
- The Completed Reports tab lists all the reports that have been generated within the last 7 days.
- The Scheduled Reports tab displays any reports that have been set up to run for a specific start and end date. You can edit the reports or delete them from the scheduled run.



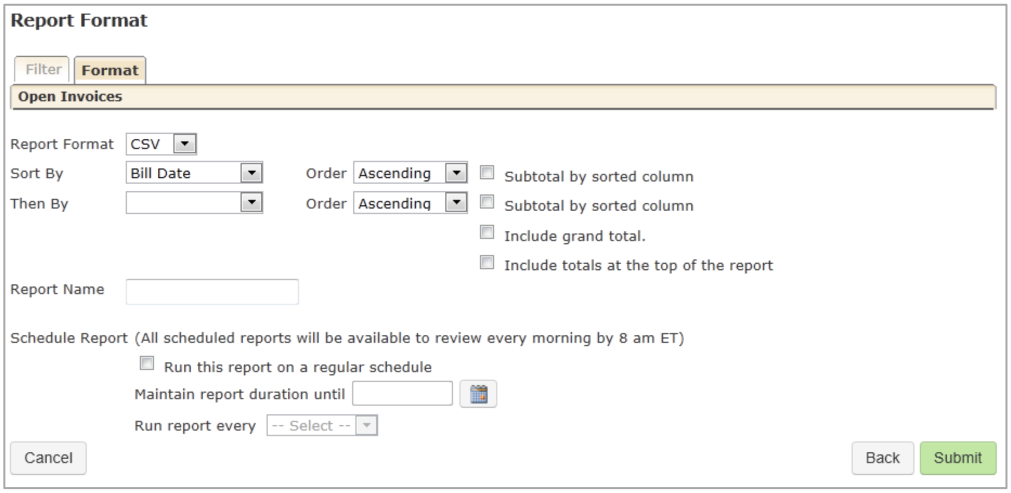
Creating and Viewing On-Demand Reports

1. Select Create from the drop-down menu for the report you want to generate from the Reports tab. Reports are categorized by Invoice or Payment report type.



2. Enter the parameters for the report and click **Next** to display the Format tab.

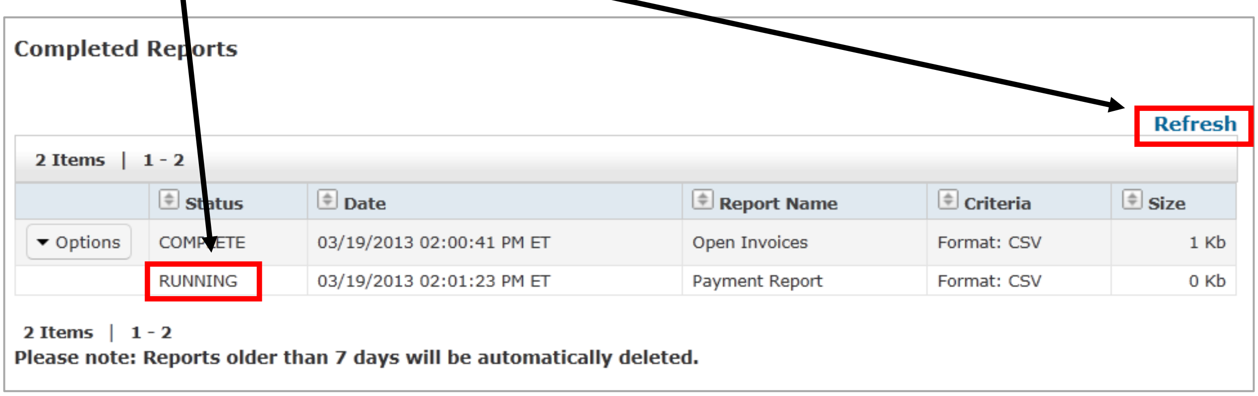
3. Enter the formatting options, including report output (CSV, HTML, or PDF), and sorting preferences. Do not select the run this report on a regular schedule checkbox since you are submitting this as an on-demand report.



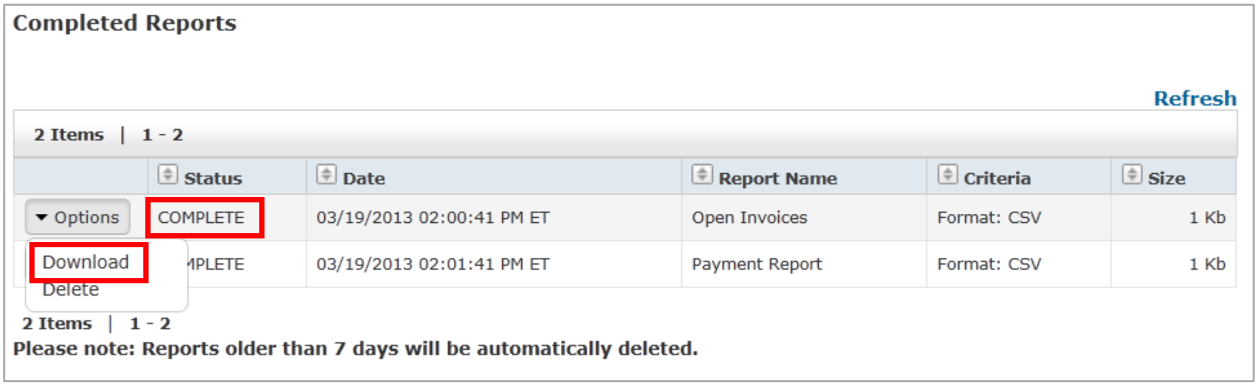
* ***Note about formats:*** The following guidelines can assist you in choosing the best output format for your purposes:

- CSV: best for sorting and manipulating data as well as exporting into other applications.
- PDF: best for printing
- HTML: best for viewing information online when printing is not needed

4. Click **Submit** to display the report on the Completed Reports tab. While the report is generating, the status displays as "Running" as shown below. Depending on the size and complexity of the report, it may take a few moments to generate the results. Click **Refresh** to determine if the report is ready to be downloaded.



5. Once the report is available, the status changes to Complete. Select **Download** from the drop-down menu to generate the report in the format you selected.



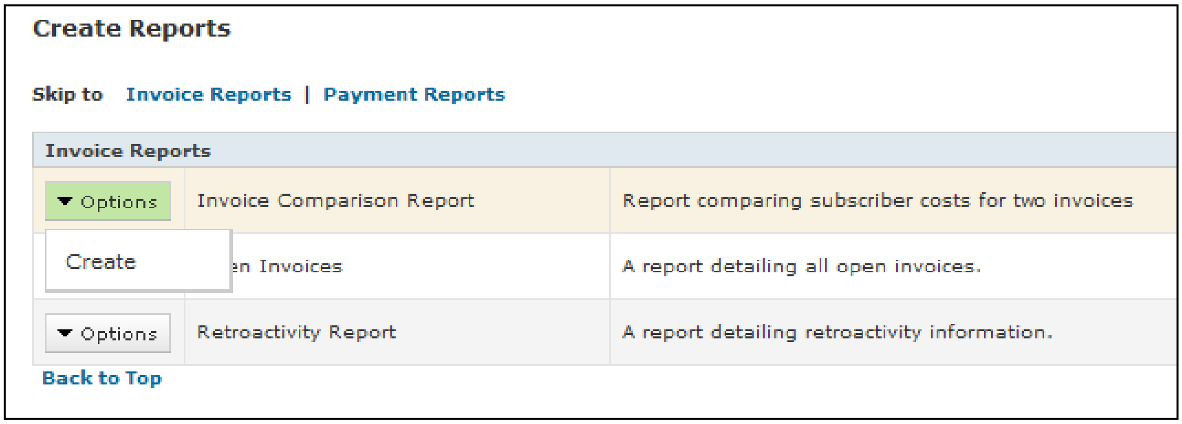
Scheduling Reports

In addition to creating on-demand reports, you can also schedule them. You can set up a report to be run once a week, for example, and the report will run automatically at the designated time. You can define when the report should be run—daily, weekly, and monthly.

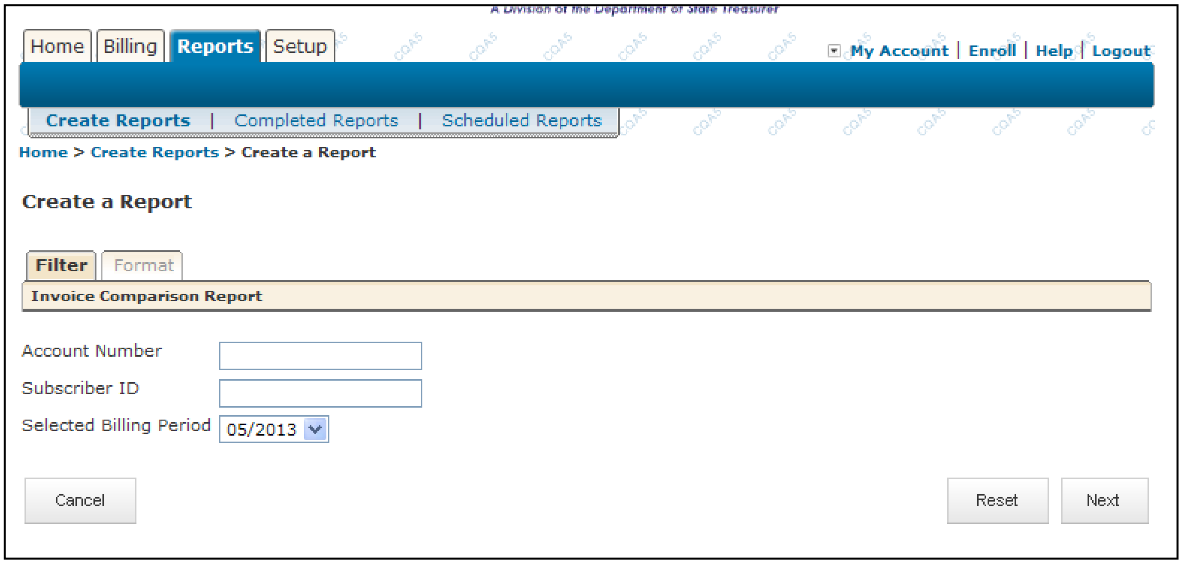
If another scheduled report runs during the time period already set for scheduled reports, eBilling creates another instance of the report, rather than replacing the previously-generated report.

To schedule reports:

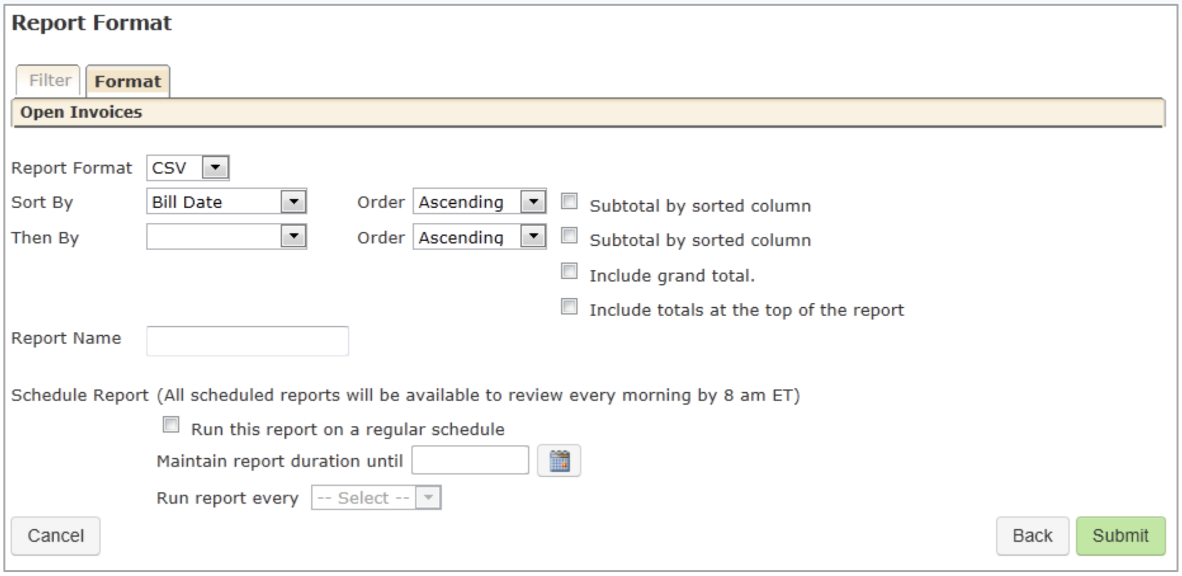
1. Select **Create** from the drop-down menu for the report you want to generate from the Reports tab. Reports are categorized by Invoice or Payment report type.



The Create a Report window displays with the Filter tab selected.



2. Enter the parameters for the report and select **Next** to display the Format tab.



3. Enter the formatting options, including report output (CSV, HTML, or PDF), and sorting preferences. Select the Run this Report on a regular schedule checkbox and enter the scheduling parameters for the time frame you want to run the report.

   * ***Note about formats:*** The following guidelines can assist you in choosing the best output format for your purposes:

   - CSV: best for sorting and manipulating data as well as exporting into other applications.
   - PDF: best for printing
   - HTML: best for viewing information online when printing is not needed

4. After filling out scheduled criteria and selecting Submit, you receive a message that states “Your report has been scheduled.”

Notes:

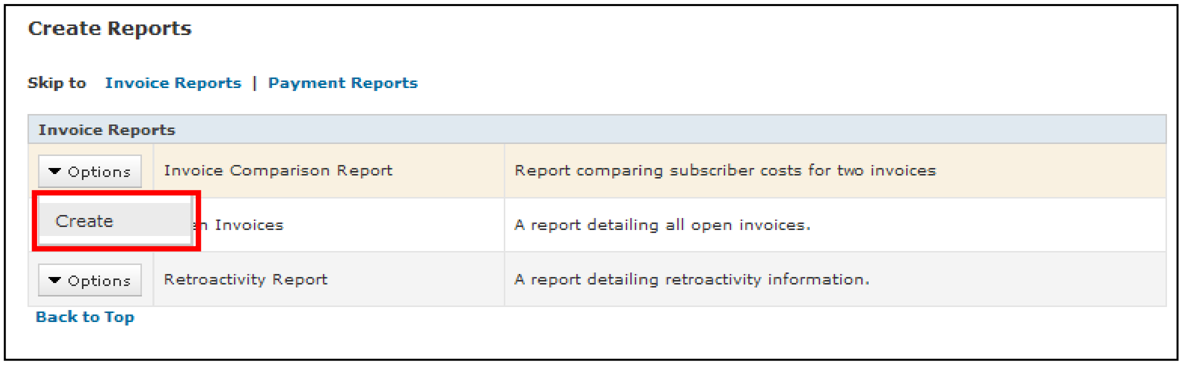
- The report displays under the Scheduled Reports tab with a status of Pending until it runs. It will then have a status of Complete.
- Once you review the report, the status changes to Viewed. Also, the criteria of a scheduled report can be edited.

Invoice Comparison Report

The Invoice Comparison Report will assist with the monthly reconciliation process and understanding what has changed from one month's invoice to the next.

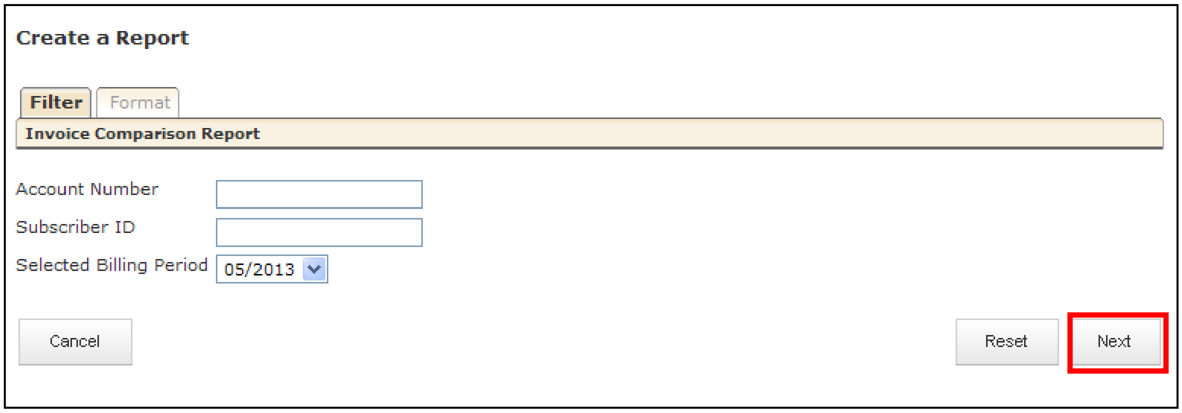
To run the Invoice Comparison Report:

1. Select Create from the Options drop down to the left of the Invoice Comparison Report.



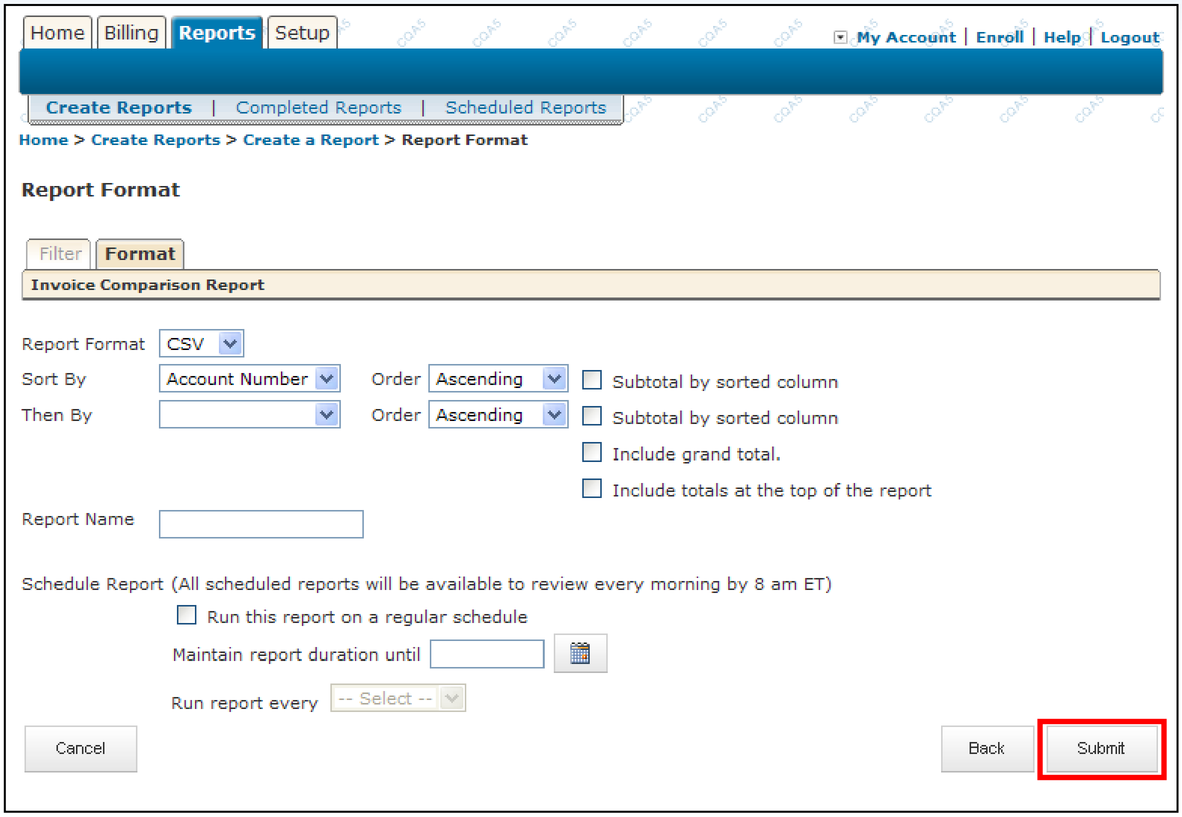
The Create a Report screen displays with the Filter tab selected.

2. Enter the Account Number, Subscriber ID, and Billing Period and click **Next**.



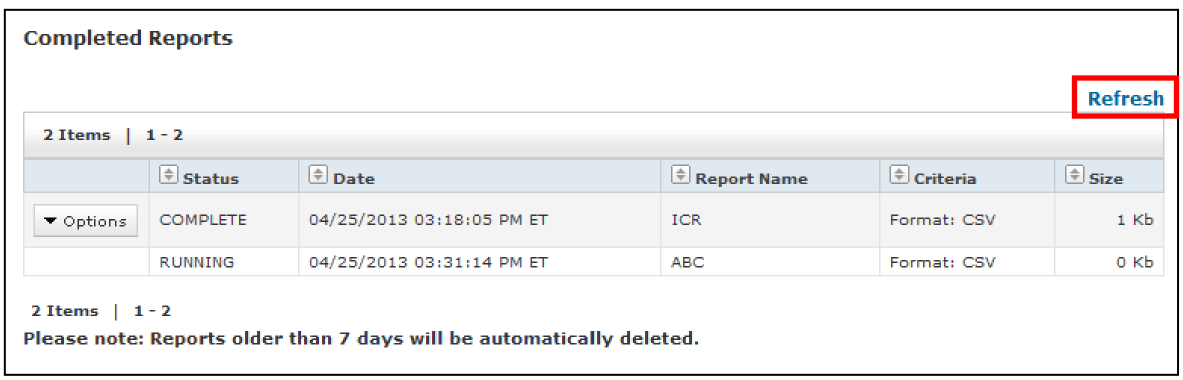
The Format tab displays.

3. Select the Formatting options for the report as described in the previous section. Click **Submit**.

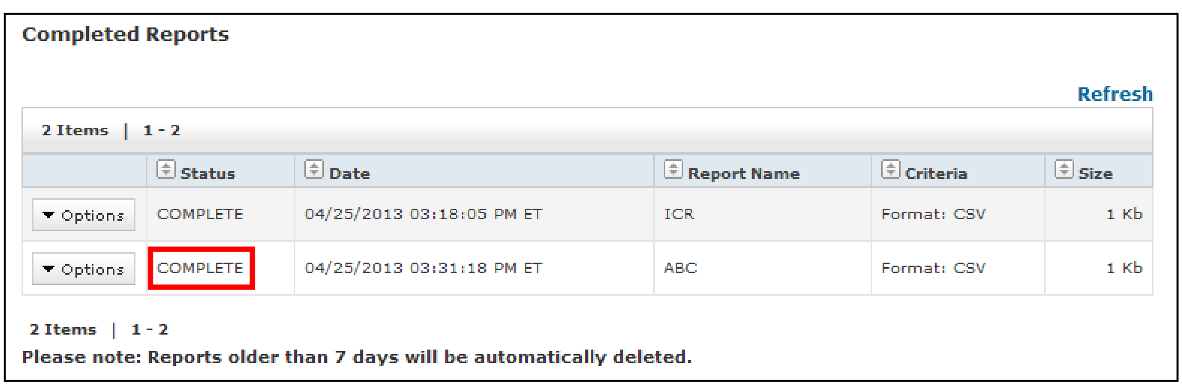


The Completed Reports screen displays with the report status "Running."

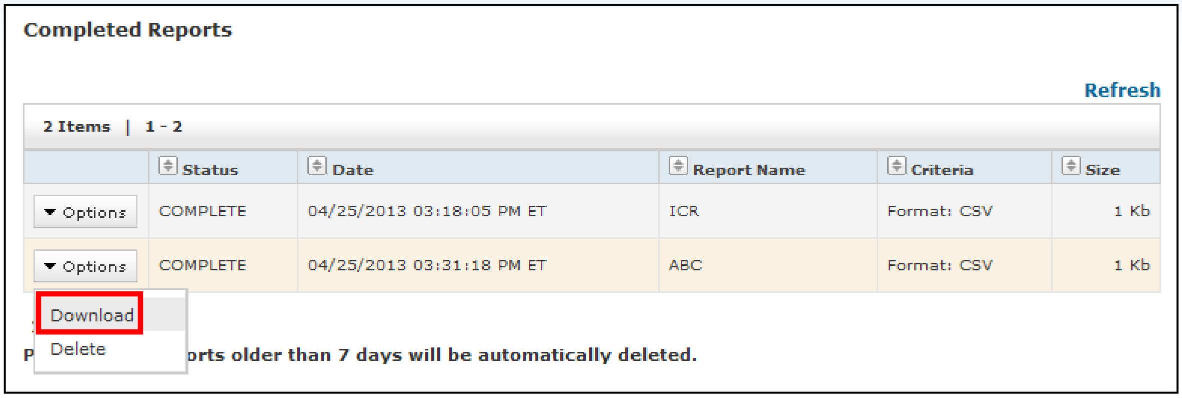
4. Click Refresh.



When the report is finished generating, the status changes to Complete.



5. Click the Options dropdown, then click **Download** to download the report.



Completed Reports

Refresh

2 Items | 1 - 2

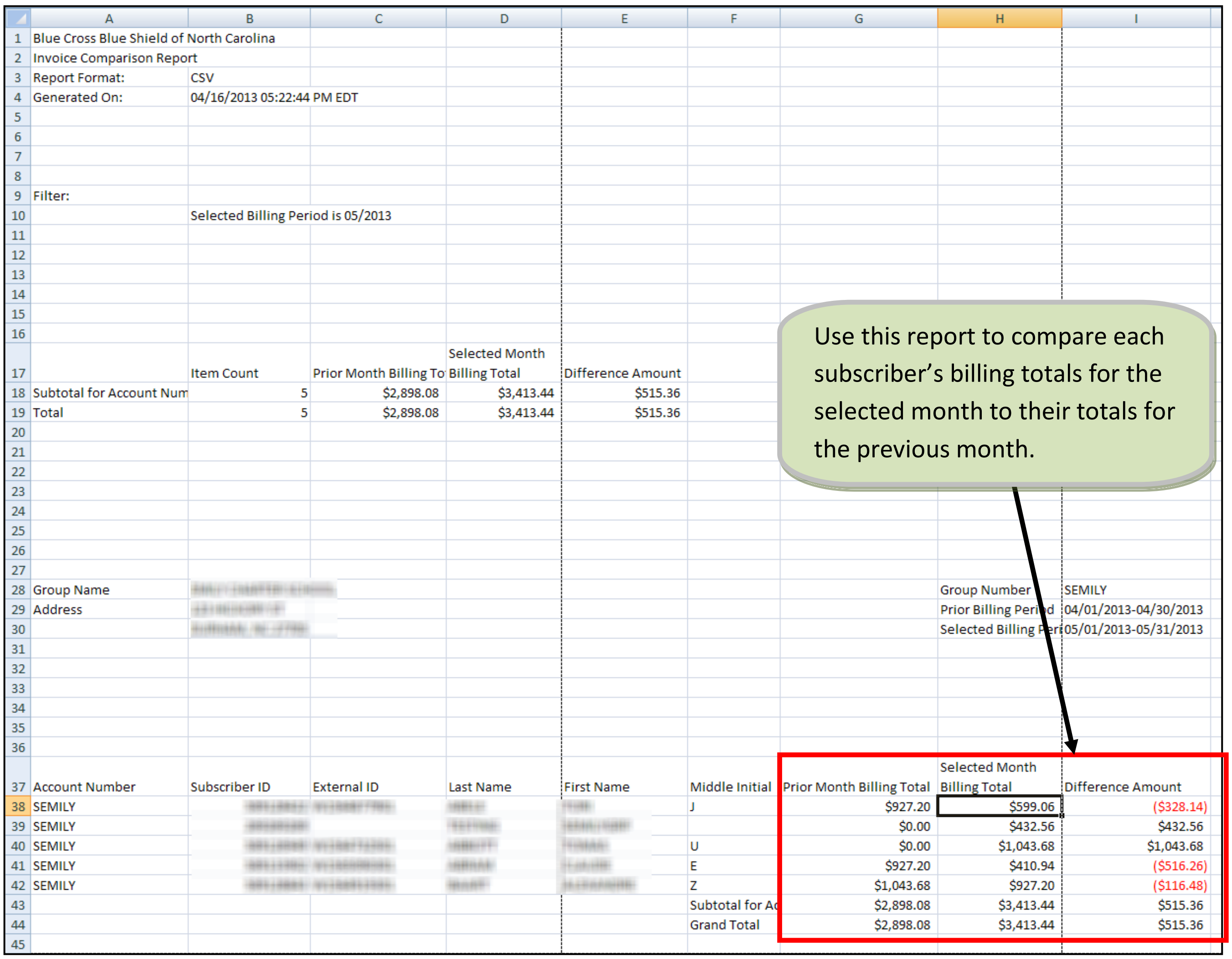
	Status	Date	Report Name	Criteria	Size
▾ Options	COMPLETE	04/25/2013 03:18:05 PM ET	ICR	Format: CSV	1 Kb
▾ Options	COMPLETE	04/25/2013 03:31:18 PM ET	ABC	Format: CSV	1 Kb

Download

Delete

P… orts older than 7 days will be automatically deleted.

The report is generated in the format you specified.



	A	B	C	D	E	F	G	H	I
1	Blue Cross Blue Shield of North Carolina								
2	Invoice Comparison Report								
3	Report Format:	CSV							
4	Generated On:	04/16/2013 05:22:44 PM EDT							
9	Filter:								
10		Selected Billing Period is 05/2013							
17		Item Count	Prior Month Billing To	Selected Month Billing Total	Difference Amount				
18	Subtotal for Account Num	5	$2,898.08	$3,413.44	$515.36				
19	Total	5	$2,898.08	$3,413.44	$515.36				
28	Group Name	[redacted]						Group Number	SEMILY
29	Address	[redacted]						Prior Billing Period	04/01/2013-04/30/2013
30		[redacted]						Selected Billing Peri	05/01/2013-05/31/2013
37	Account Number	Subscriber ID	External ID	Last Name	First Name	Middle Initial	Prior Month Billing Total	Selected Month Billing Total	Difference Amount
38	SEMILY	[redacted]	[redacted]	[redacted]	[redacted]	J	$927.20	$599.06	($328.14)
39	SEMILY	[redacted]		[redacted]	[redacted]		$0.00	$432.56	$432.56
40	SEMILY	[redacted]	[redacted]	[redacted]	[redacted]	U	$0.00	$1,043.68	$1,043.68
41	SEMILY	[redacted]	[redacted]	[redacted]	[redacted]	E	$927.20	$410.94	($516.26)
42	SEMILY	[redacted]	[redacted]	[redacted]	[redacted]	Z	$1,043.68	$927.20	($116.48)
43						Subtotal for Ac	$2,898.08	$3,413.44	$515.36
44						Grand Total	$2,898.08	$3,413.44	$515.36

Reminder: the Subscriber ID is the member's social security number plus the two-digit BCBSNC suffix.