



# The UABT Online Portal

**User Manual** 

UABT gives you the tools and resources you need to manage your health benefits. Get instant access to our secure website for these services whether you are a provider, employer, or member!



# **Table of Contents**

<b>I</b> .	ogin Page	2
	Login Instruction	2
Π.	Forms Tab	3
	Types of Forms	3
	Enrollment Add/Change	4
	Start a New Form	4
	Enrollment Add	4
	Enrollment Change	6
	Adding a dependent	7
	Enrollment Confirmation Page 1	0
	Termination 1	1
	Submit Multiple Termination 1	2
	Print Enrollment 1	3
	Rate Inquiry 1	4
V.	Claim Center14	4
	Group Claim Center Error! Bookmark not defined	ł.
V.	Coverage Verification1	5
	To view employee's coverage date 1	5
	Display Plan Summary1	6
VI.	Reports 18	8
VI	Additional Services	9
	Requesting for Member ID Card1	9
	Print Temporary ID Card 2	0
	Make Contribution Payments	3
	Contact Us 2	4



## I. Login Page

**Login Instruction** 

Employers' login must be set with United Agricultural Benefit Trust. A *HIPAA Release of Information form* must be on file prior to receiving your login information.

Please contact UABT Enrollment Department for accessPhone:(800) 223.4590Email:enrollment@unitedag.org



Your Privacy Is Our Top Priority. This is a password-protected site. As supporters of the Verisign Secure Site Program, this is a secure site that keeps you and your family's health care information strictly confidential.





## II. Forms Tab

### **Types of Forms**

Once you are logged in, the first tab is the *Forms* tab, which provides you the following UABT forms:

- Domestic Partnership Affidavit
- Domestic Partnership Termination
- Employee Enrollment Application
- Employee Change Form
- Statement of Health Form
- Upload a File

The Upload a file feature allows you to submit any secured file to UABT such as:

- Eligibility Listing
- Response to Missing/Pending Information

	AccessUnitedAg
Member	t Home 🔮 Forms 💣 Enrollment 🔍 Coverage Verification 🖷 Reports 🕥 Additional Services
Welcome back Security 315	Welcome Employers
Logout	AT gives you the tools and resources you need to manage your health benefits. It instant access to our secure website where you can:
	Enroll & Change Members
	Print Temporary ID Card
	Ake Contribution Payment
You are able to	Privacy Is Our Top Priority. This is a password-protected site. As supporters of the Versign Secure Site am, this is a secure site that keeps you and your family's health care information strictly confidential.
change the password that was given to you	Privacy & Security Policy   Disclaimer



## III. Enrollment Add/Change

#### Start a New Form

Allows you to enroll a new employee onto your policy or modify an existing employee's demographics (i.e., address, date of birth, dependent info)

i. This feature will also allow you to add additional qualified dependents.

#### Change an Existing Form Listed Below

allows you to modify forms that was created through AccessUnitedAg before it gets approved by UABT.





### Enrollment Add

#### Enrollment Add/Change, Start a New Form

Once you enter the employee's Social Security Number,

i. If employee is brand new, you will get a blank form as shown below

		AccessUnitedAg The UABY Online Portal	
	A Home	Forms Carrollment Coverage Verification	
Member	THE HOME		
Signed In		Enrollment Form	
Welcome back		ENROLLMENT ACTION:	
Security 315		New	
	Employee Demograph	aphics	
	SSN:	1: 123456789 (enter no dashes)	
Logout	Prefix:	New Employee Add	
	First Name:	e M.I.:	
Change Password	Last Name:		
	Suffix:		
	Address:		
	City:	State: Zip:	
	Phone:		
		: C Male C Female Birth Date: ////	
	Employment		a mot
	Date:	Status: I Select Employment Status	ry if you do
		not have	
	Member Eligibility	Medical Plan: Select a Group/Plan   From Date: 7 7 7 Insuranc	e J
	2.20 A	Group's established waiting period will be verified to confirm effective date.	
Other I	formation	Beneficiary:	
		Beneficiary Relationship:	
The falls will be an exclusion of the state of the state	Anyone El	Eligible and Covered By MEDICARE?: O Yes O No	
Fields will be mandatory to determine if there is any coordination of benefits		If YES, who?:	
needed	Doe	oes member have Other Coverage?: O Yes O No	
		ES, will member continue coverage?: O Yes O No	
<		o dependents have other coverage?: O Yes O No	
		Who:	
		If YES, will they continue?: O Yes O No	
	Does mor	ember or any dependence qualify for	
	Does mer	pre-existing limitation credit?:	
		If YES, how many months?:	
		Name of previous carrier:	
		Continue to Dependent Section Cancel	



# Enrollment Change

#### Enrollment Add/Change, Start a New Form If employee was previously enrolled onto your policy, the employee's information will populate in the data field below

			Ace	cessUn	
Member Signed In	🏡 Home 🛛 🥦 Fo	orms 💰 Enrollment	Coverage Verification	Reports (	Additional Services
			Enrollment Form		
			ENROLLMENT ACTION:		
	English Banana		ENROLLMENT ACTION: © New		
	Employee Demograp		€ New		
		hics 123456789 (enter no d	€ <sub>New</sub>		
Security 315	SSN:	123456789 (enter no d	€ <sub>New</sub>	Modify	ing Employee In
Security 315 Logout	SSN: Prefix: First Name:	123456789 (enter no d	€ New	Modify	ing Employee In
Security 315 Logout	SSN: Prefix: First Name:	123456789 (enter no d JOHN	€ New	Modify	ing Employee In
Security 315 Logout	SSN: Prefix: First Name: Last Name: Suffix:	123456789 (enter no d JOHN	€ New	Modify	ing Employee In
Security 315 Logout	SSN: Prefix: First Name: Last Name:	123456789 (enter no d JOHN SMITH	€ New	Modify	ing Employee In
Security 315 Logout	SSN: Prefix: First Name: Last Name: Suffix: Address:	123456789 (enter no d JOHN SMITH	€ New	Modify	ing Employee In
Security 315 Logout	SSN: Prefix: First Name: Last Name: Suffix: Address: City: Phone:	123456789 (enter no d JOHN SMITH 54 CORPORATE PARK IRVINE 9495551234 (numerics o	© New (ashes)	Zip: <b>92606</b>	ing Employee In
Security 315 Logout	SSN: Prefix: First Name: Last Name: Suffix: Address: City: Phone:	123456789 (enter no d JOHN SMITH 54 CORPORATE PARK IRVINE 9495551234 (numerics o	© New (ashes)	Zip: 92606	ing Employee In
Welcome back Security 315 Logout Change Password	SSN: Prefix: First Name: Last Name: Suffix: Address: City: Phone:	123456789 (enter no d JOHN SMITH 54 CORPORATE PARK IRVINE 9495551234 (numerics o © Male C Female 1	© New (ashes)	Zip: <b>92606</b>	ing Employee In

Other Information	Beneficiary: SAMANTHA SMITH
	Beneficiary Relationship: WIFE
	Anyone Eligible and Covered By MEDICARE?: C Yes 💿 No
	If YES, who?:
	Does member have Other Coverage?: C Yes 💿 No
	If YES, will member continue coverage?: O Yes O No
	Do dependents have other coverage?: C Yes 💿 No
	Who:
	If YES, will they continue?: O Yes O No
	Does member or any dependents qualify for C Yes © No pre-existing limitation credit?:
	If YES, how many months?:
	Name of previous carrier:
	Continue to Dependent Section Cancel



#### Adding a dependent

#### Enrollment Add/Change – Adding a dependent

Once a member has been added or modified, the option to add dependent(s) will follow. You will need to click on Add Dependent.

If there are no dependent(s) to be added for this employee, click on Submit this Enrollment.





#### Enrollment Add/Change – Adding a dependent

Once you complete the employee's enrollment section (see Part III, Section a), you will be instructed to enter the appropriate information on the dependent in the fields provided.

When you are done, click on Add this Dependent.



morridadi				
Status Change:	:	Date:	COBRA Re	eason:
Please Choose	-		Please Choose	•
omments:				
				<b></b>
				~



#### Enrollment Add/Change – Adding a dependent

At this point, you may repeat the process to add additional dependent(s) or you can click on Submit this Enrollment to complete the enrollment process on this employee.



Your Privacy Is Our Top Priority. This is a password-protected site. As supporters of the Verisign Secure Site Program, this is a secure site that keeps you and your family's health care information strictly confidential.





## Enrollment Confirmation Page

Enrollment Add/Change – Adding a dependent

A Confirmation page will pop up for you to print for your file. See sample below.

On-Line Enrollment Form		Close Window Print This Pa
Employee Demographics		Please Print in Landscape I
employee bemographics		
Form Status :	Submitted	
SSN # :	<u>123-45-6789</u>	
lame :	JOHN SMITH	
Address :	54 CORPORATE PARK IRVINE CA 92606	
Phone # :	<u>949-555-1234</u>	
mployment Date :	1/01/2009 Employment Status : Active	
nrolling User :	security315	
Other Information		
Beneficiary :	SAMANTHA SMITH	
Beneficiary Relationship:	WIFE	
Anyone Eligible and Covered by MEDICARE? :	N	
If YES, who? :		
Does member have Other Coverage? :	N	
f YES, will member continue coverage? :	N	
o dependents have other coverage? :	n N	
Nho? :	-	
f YES, will they continue? :	N	
Does member or any dependents qualify	<u>n</u>	
for pre-existing limitation credit? :	N	
f YES, how many months? :	<u>n</u>	
lame of previous carrier? :		
value of previous camera :		
Dependent Number 1 Information		
Dependent Name :	JOHN SMITH	
Relationship :	Member	
Dependent SSN :	123-45-6789	
Dependent Address :	54 CORPORATE PARK IRVINE CA 92606	
Gender :	Male	
Date of Birth :	7/14/1948	
Disabled? :	N	
/edicare Disabled? :	<u>N</u>	
Status Change :		
Status Change Date :		
COBRA Reason :		
Comments :		
Dependent Number 2 Information		
Dependent Name :	SAMANTHA	
telationship :	Spouse	
Dependent SSN :		
Dependent Address :		
Sender :	Female	
Date of Birth :	5/05/1974	
Disabled? :	N	
Medicare Disabled? :	N	
Status Change :	DEPENDENT EFFECTIVE DATE	
Status Change Date :	1/01/2012	
COBRA Reason :		
Comments :		

Electronically Signed by :  $\underline{security315}$  on :  $\underline{3/28/2012}$  at :  $\underline{11:22:42}$ 



#### **Termination**

This option will allow you to terminate a single employee off your policy or do multiple terminations.

Please Note: You will only be able to terminate one month at a time.





### Submit Multiple Termination

Termination

Once you select the account the terminated employee is enrolled under, you will need click on the check mark next to their name and click on the *Submit Multiple Termination* button.

Please note: All termination is subject to review. Retro active termination will be prohibited.





#### Print Enrollment

This option will allow you to print a copy of the enrollment that was processed through this online portal.



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#### Rate Inquiry

This feature will allow you to calculate the contribution rate for new and existing employees on your benefit plan.

- a. Follow the instruction on the Rate Inquiry screen based on your group size.
- b. Once all the required information is entered, click on Calculate

		Rate Inquir	y		
Instructions (Must e	nter all family member en	nrolled to get app	ropriate monthly co	ontribution):	
a. If member's effe b. Otherwise, plea c. If dependent's e	ation must use the memi ictive date is prior to Jan se use effective of eligibi ligibility start after the me fective date of eligibility.	uary 1, 2014, ple ility.	ase enter 01/01/20		eligibility
	tion must use effective d	late of eligibility			
Default Eff Date (mm/dd/yyyy); [ Employer Number; Base Plan; [ Member DOB (mm/dd/yyy); [ Child #1 DOB (mm/dd/yyy); [ Child #2 DOB (mm/dd/yyy); [ Child #2 DOB (mm/dd/yyy); [	FRR: REVOLUTION P 15 / 05 / 1980 11 / 07 / 1976 11 / 03 / 2003 / / /	LAN   Effective D  Effective D  Effective D  Effective D  A schildren, enter  Calculate	ate: 01 / 01 ate: 01 / 01 ate: /	/ 2014 / 2014 / 2014 / 2014 //	Zip Code: 93912 Zip Code: 93912 Zip Code: 93912 Zip Code: Zip Code:
Plan: FRR; REVOLUTION PLAP					
Member DOB: 5/05/1980 Spouse DOB: 11/07/1976 Child #1 DOB: 11/03/2003 Child #2 DOB: Child #3 DOB:	Member Effective Date: Spouse Effective Date: Child #1 Effective Date: Child #2 Effective Date: Child #3 Effective Date:	1/01/2014 : 1/01/2014 :	Zip: 93912 Zip: 93912 Zip: 93912 Zip: Zip:		
Member Spouse Child #1	Med Den 385.74 398.62 204.46	Life Vis 6.50 29.00	Admin	Rx Total 421.24 398.62 204.46	
Child #2 Child #3 TOTALS:	988.82	6.50 29.00		1024.32	Your monthly contribution amount
		Continue		$\smile$	



## V. Coverage Verification

#### To view employee's coverage date

Enter the employee's ID or Social Security Number to view coverage verification on that specific employee.



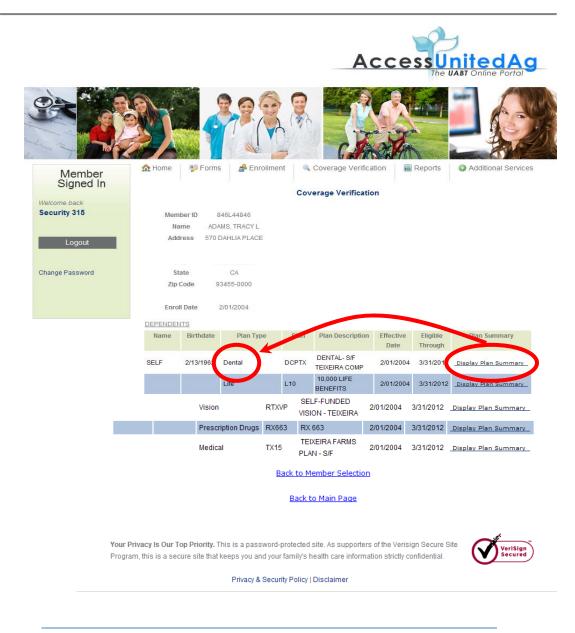




### Display Plan Summary

Enter the employee's ID or Social Security Number to view coverage verification on that specific employee.

You can click on *Display Plan Summary* to get a detailed description of the associated plan listed to the left of the link.







#### Plan Summary

a. Below is a sample of the *Plan Summary*.

#### UABT Schedule of Dental Expense Benefits

#### **Dental Plan**

If you or an eligible dependent incur Covered Expense for dental services while the patient is eligible for benefits under the Plan, you will be reimbursed in accordance with the following schedule.

#### Type I Services

#### **Type II Services**

#### Type III Services

Removable or fixed bridges, pontics, abutment crowns and partial or complete dentures.....60% of usual and customary charges.

#### Type IV Services

Orthodontia for any reason	no	t covered	expense.
----------------------------	----	-----------	----------



## **VI. Reports**

#### A. Eligibility List

The Eligibility list will provide you with the current day roster of employees by group and plan. You will be able to view ID #, Name, Date of Birth, and Contribution Amount.

#### B. View Archived Data

The location of all reports you've ordered in chronological order. Please allow a minute for the report to be generated and placed in this location. You will receive an email notification once the report has been created.



### **VII.** Additional Services

#### Requesting for Member ID Card.

Under Additional Services, you will need to click on Request for a member ID card. A new window will pop up with the following fields. All the fields are required.

Note: It will be faster if you give the Enrollment & Billing Department a call if you are trying to order an ID Card for more than 5 employees. Or email a list to us at enrollment@unitedag.org.

First Name:	
Last Name:	
Member ID:	
Email:	
Mailing Address:	
City:	
State:	
Zip:	
Name of Employe	r line in the second seco
Phone Number (xxx-xxx-xxxx):	
Number of Cards Requested:	

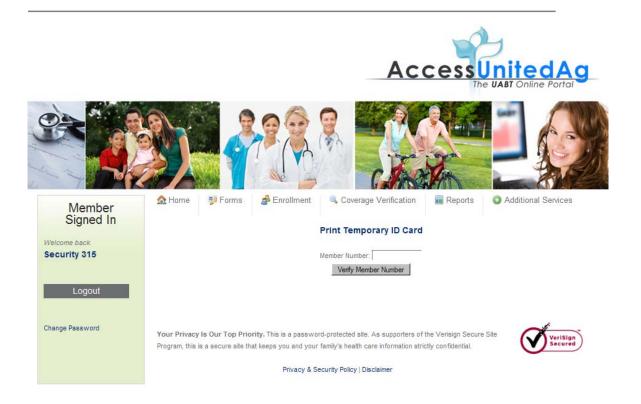


#### Print Temporary ID Card.

Under Additional Services, you will need to click on Print Temporary ID card.

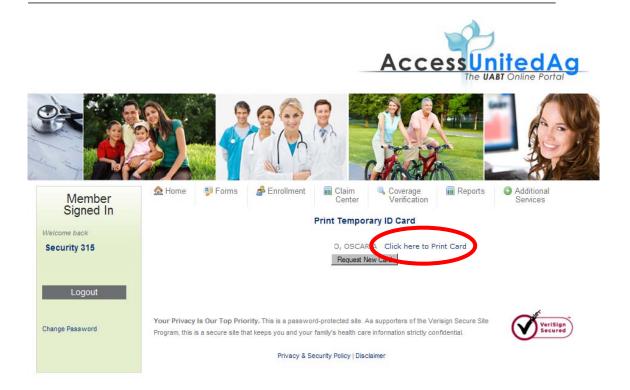
Enter the employee's ID or Social Security Number to view coverage verification on that specific employee.

Note: This feature will only be available to existing and active employees. New enrollees that have not been approved and contributions have not been posted will not have access to a temporary card.





Print Temporary ID Card. Below is a copy of the temporary ID card.





## Temporary ID Card Sample

Below is a *sample of the temporary ID card* 

Temporary ID Card Benefit ID Only - Not Proof of Bigibility Sòlo Para Indentificarse - No es Prueba de	
Member Name	
John Doe	
Member ID Number 111X22222	
Employer: ABC Company, Inc.	Employer Number: 1100-000
Medical Copay: \$20	Rk Copew: \$10/ \$20/ \$30
Medical Network Provided by Blue Shield of C	alifornitR: Oloup 1t: 512161 R:BIN: 603286 / R:RCN: 01410000
Issue Date: 04/13/2012	
This temporary ID Card is valid 30 days from	issue date
Blue Shield CA, Prior Authorization Inquiries, ⊟igibility, Benefits, Claincs &	800. 541. 6652
all Services out of California	800, 223, 4590
Locate a Blue Shield Provider	www.bl.ueshi elidas.com/inet workPPO
Catalyst Rx - Health Rx Program	800. 207. 2568
First Health Network (outside of California)	800. 247. 2898
<u>Terms and Conditions:</u> Catalyst Ro: if co-pay reads 100%, patient wi	ill pay a contracted discount price.
Patients with a co-pay may still be responsil reads "NA", patient may be responsible for p covered expense.	
Prior Authorization: All inpatient admission: admissions require 48 hour notice. Failure to	
lf ID Card reads, "Mexican Panel Only", no b	enefits are payable for treatment in the l
Providers file all California medical clains P. C. Box 272540, Chico, CA35327-2540	with Blue Shield of California
Please file all claincs outside of California 54 Corporate Park, Irvine, CA 3260(800) 223	
Blue Shield of California, an independent men provides network access only, and no network	



### Make Contribution Payments

Under Additional Services, you will need to click on Make Contribution Payment. A new window will pop up.

- If this is your first time, you will need to register by selecting Contribution Payment.
  - You will need your UABT Group number

(Enter the number without the preceding zeros, 1234-000)

- You will need your Billing Zip Code
- The site will lead you into registering and you will then be able to make a payment.
- If you have already registered, proceed with your payment.

JAL	with economic solutions, benefits, and services both domestically and internationally."	UABT
Please be advised that all pa ates required field	ayments received after 4:30 PM PST M-F will be pro	ocessed on the following business da
Log In	Register	
Username: *	Bill Type: * Contribu	ution Payment
	Login Group Number: *	
forgot	your username? Lip couci	Submit



#### Contact Us

From the Additional Services tab, you can click on Contact Us for contact information.



#### Contact Us

Please fill out this form for more information:

United Agricultural Benefit Trust Mailing Address: 54 Corporate Park

Irvine , CA 92606-5105

Phone Number: (800) 223.4590

Please contact the following departments for questions regarding:

Claims and Benefits: Reports:

Customer Service - customerservice@uabt.org Enrollment and Eligibility: Billing Department - uabtbilling@uabt.org Client Services - mevanson@uabt.org

mmonter

		<u> </u>
		Y

Submit Reset Form