SummaCare

Plan Central

Employer Learning Guide

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Introduction

SummaCare is proud to introduce the all-new Plan Central web portal for employer groups. Our team of account managers, information technology professionals, and eligibility specialists worked together to provide you with an appealing, intuitive, and convenient way to manage your group's Plan membership. The new Plan Central was completely developed in-house at SummaCare and all changes and enhancements will be handled by our internal Plan Central development specialists.

The Plan Central Employer portal will allow you to securely add and update member information online, thus eliminating the need for paper tasks and reducing turnaround time for many employer health plan interactions.

An Internet connection is all you need in order to access the Employer portal from anywhere, anytime, to do the following:

- Verify employee eligibility and plan benefits
- Add, delete, or make changes to employees on your Plan(s)
- Check the status of an application submitted online through Plan Central
- Create and manage Plan Central Employer user accounts for your group
- View and print copies of invoices sent to your group*

** This function is not available to employers who currently receive electronic invoices.*

As with any online program, you will need to familiarize yourself with how the system has been designed, what features it includes, and how the features should be used. This guide will help you accomplish these tasks.

Enhancements to the New Plan Central

Along with a fresh look and feel, the new Plan Central features the following enhancements:

Invoice – You can now view, print, and save the actual paper invoice sent to your group. This function is not available to employers who currently receive electronic invoices.

- Enrollment Status – You can now view the status of enrollment (i.e. additions to plan, and terminations).

- Expanded Plan Benefits – Benefits displayed mirror the schedule of benefits that is sent to the member when a member enrolls in the plan.

User Roles

User Roles determine the level of access the user has in Plan Central. The Employer module has two user roles, **Fully Funded Employer Super User** and **Fully Funded Employer Trading Partner Super User**

As a **Fully Funded Employer Super User**, you can perform the following functions:

- Display or edit employee data such as name, address, phone number, social security number, date of birth
- Display or edit division number
- Add employees to the employer group
- Enroll employees/dependents in a benefit plan
- Edit employee benefits
- Terminate employees from a benefit plan
- Reinstate terminated employees into a benefit plan
- View or edit assigned PCP (Primary Care Physician) as applicable
- View enrollment change requests you or other users from your employer group have submitted to SummaCare
- View, print, or save electronic versions of invoices sent to your group*
- Display, create, or edit user accounts associated with your employer group
- Display or edit your own account information
- Reset passwords for other Plan Central users in your employer group
- Verify Eligibility information for individuals covered under your plan.

** This function is not available to employers who currently receive electronic invoices.*

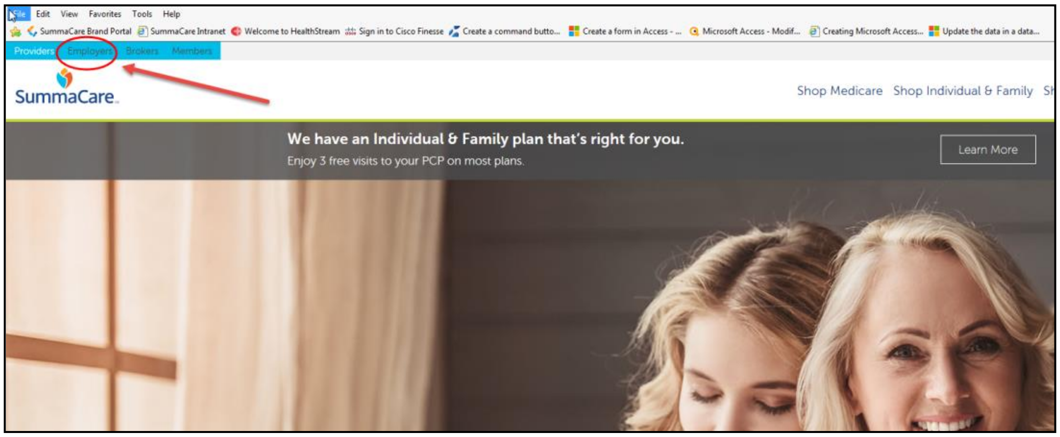
As a **Fully Funded employer Trading Partner Super User**, you can perform the following functions:

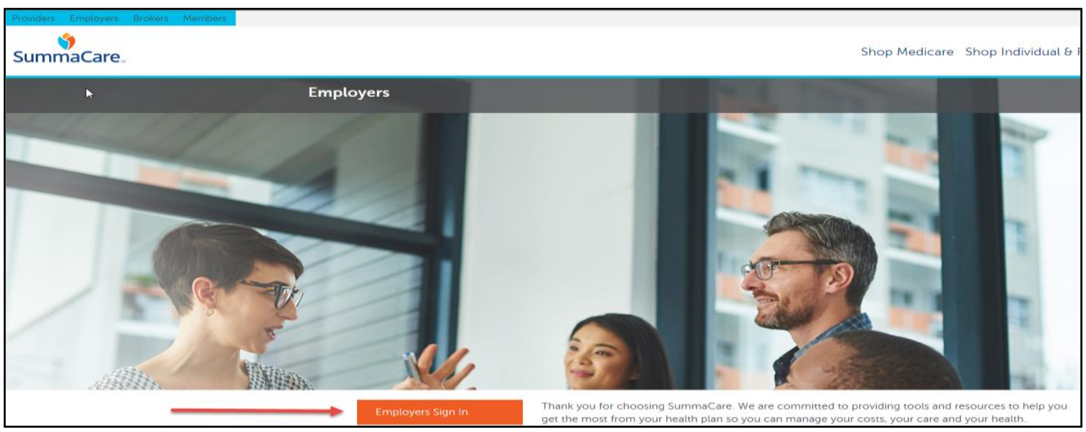
- View, print, or save electronic versions of invoices sent to your group*
- Display, create, or edit user accounts associated with your employer group
- Display or edit your own account information
- Reset passwords for other Plan Central users in your employer group
- Verify Eligibility information for individuals covered under your plan.

Accessing Plan Central

Plan Central is accessible via www.summacare.com. Click the *Employers* tab in the upper right corner above the SummaCare logo. Then click *Employers Sign In*.

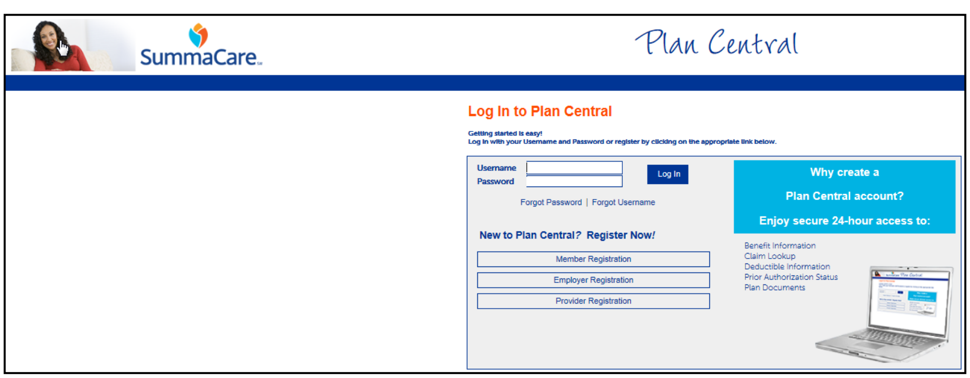
The following URL can also be typed into the address bar of the web browser: https://plancentral.summacare.com to access the Plan Central Welcome page directly to enter log in credentials.





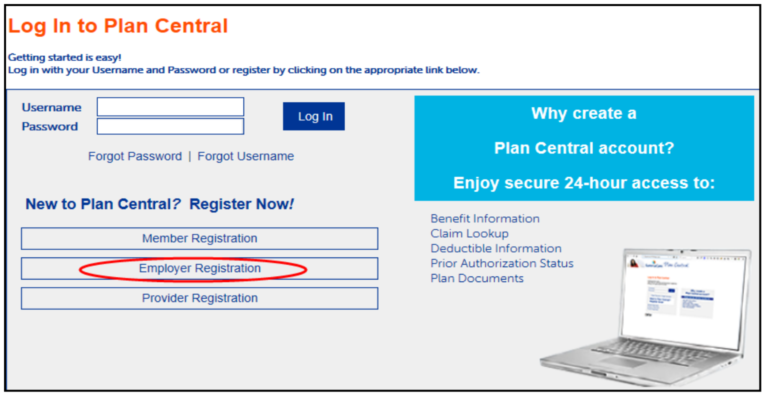
Plan Central Welcome Page

The Plan Central Welcome page is shown below. First time users will need to register.

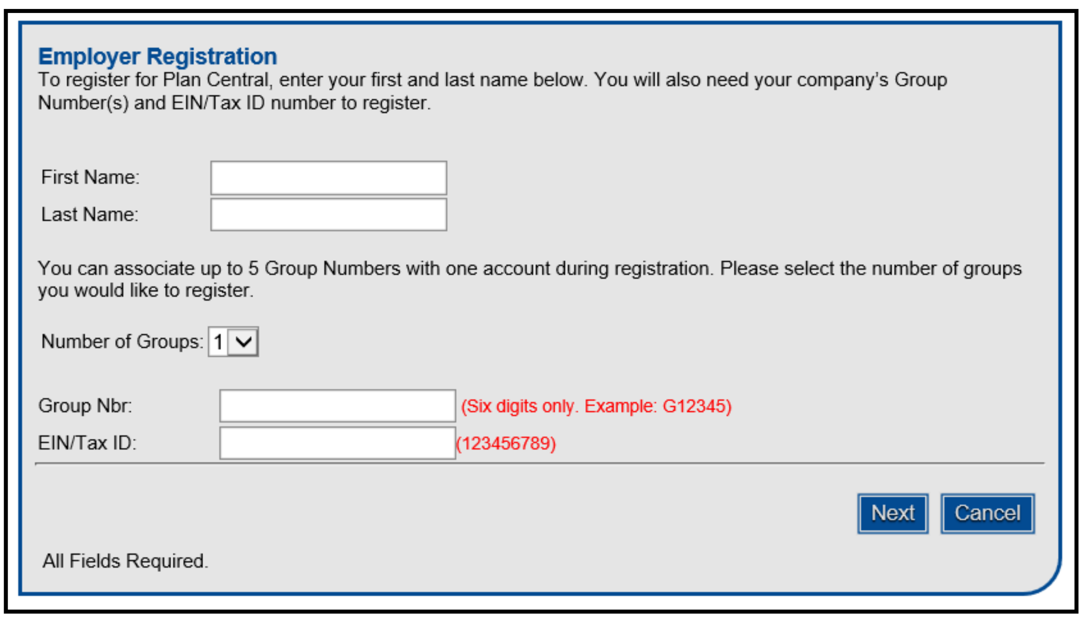


Registration

1. Click the *Employer Registration* link to proceed.



2. Complete the requested information and then click the *Next* button.



Registration, Cont'd.

Review and then click the check box to accept the Terms and Conditions; click Continue.

Terms and Conditions

BEFORE YOU CLICK ON THE ACCEPT BUTTON AT THE END OF THIS AGREEMENT, CAREFULLY READ ALL THE FOLLOWING TERMS AND CONDITIONS. BY CLICKING ON THE ACCEPT BUTTON, YOU AGREE TO BE BOUND BY AND ARE BECOMING A PARTY TO THIS AGREEMENT. IF YOU DO NOT AGREE TO ALL OF THE TERMS OF THIS AGREEMENT, CLICK THE "DO NOT ACCEPT BUTTON." YOU WILL ONLY BE ASKED TO ACCEPT THESE TERMS AND CONDITIONS ONCE!

Acceptance of Terms and Conditions:

You, the user, and or you, the super user representing the Employer Group, agree to be bound by the terms and conditions of use set forth below:
All transactions submitted to enroll a new employee, or change an employee's or dependent's status in the SummaCare benefit plan are accurate and in compliance with eligibility requirements.
You, the Employer Group, certify that each new employee enrolled has read and understands all terms and conditions, including provisions relating to Insurance Fraud.
Fraudulent activity may lead to employer group termination.
Fraudulent entries will be retro terminated back to the date the fraudulent entry was identified and any claims that were incurred during the ineligible period will be subject to overpayment recovery.
Ineligible enrollees will be retro terminated back to the date identified.
Claims incurred during the ineligible period will be subject to overpayment recovery.
You, the Employer Group, shall maintain all employee written documentation relating to any electronic transactions for the time required by applicable state and federal laws and regulations.
SummaCare retains the right to audit all aspects of the electronic transaction including written documentation maintained by You, the Employer Group.
The Employer Group has the responsibility to remove any terminated users access to the application and shall be responsible for any claims or overpayment recoveries incurred as a result of its failure to remove such terminated users access.
By clicking on the Yes button below, you, the user or the super user representing the Employer Group, acknowledge that you have read, fully understand, and agree to be bound by the terms and conditions above, and you understand that any person who, with intent to defraud or knowing that he is facilitating a fraud against an insurer, submits an application or files a claim containing a false or deceptive statement is guilty of insurance fraud. If you do not agree to be bound by the Terms and Conditions above, you may not access this site.

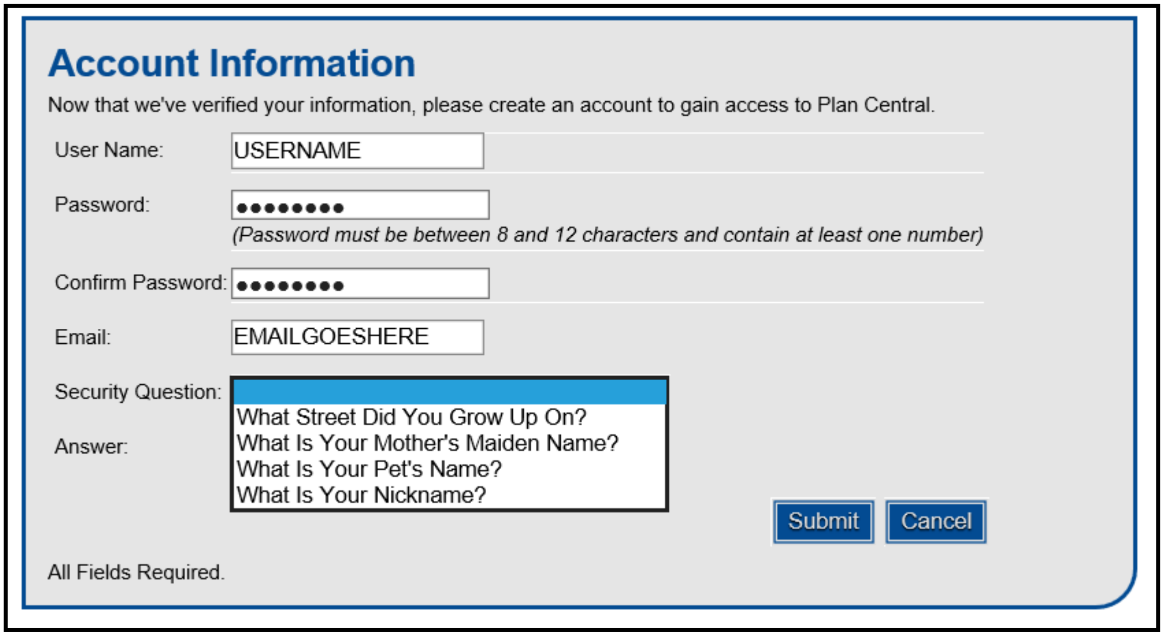
By clicking on the "continue" button below, you agree to abide by the Terms and Conditions set forth above. If you do not agree to abide by the Terms and Conditions set forth above, you will not be permitted access to this site.

☐ I agree with the terms above

Continue

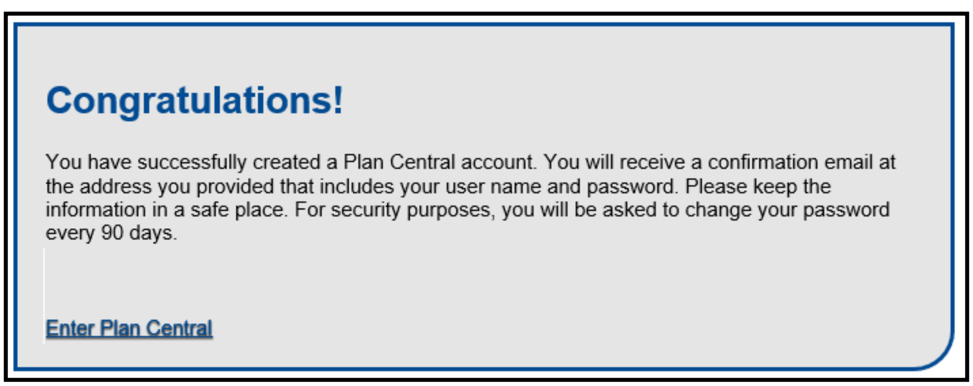
Registration, Cont'd.

3. Complete the requested information and then click *Submit*.



****It is important to select a "Security Question/Answer" in order for the "Forgotten Password" function to work properly. ****

4. The confirmation page will appear. Click the *Enter Plan Central* link to log in to the newly created account.



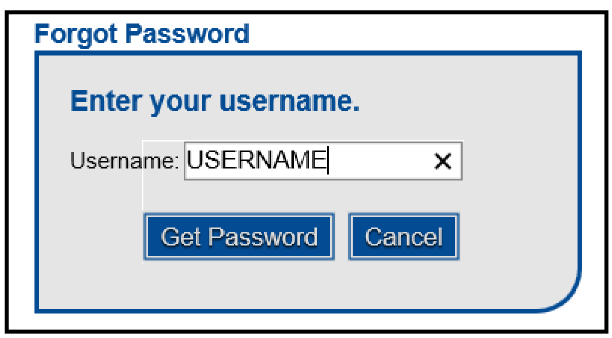
Log In

To log in to your Plan Central account, enter your Username and Password. The password is case sensitive. Then, click *Log In*.

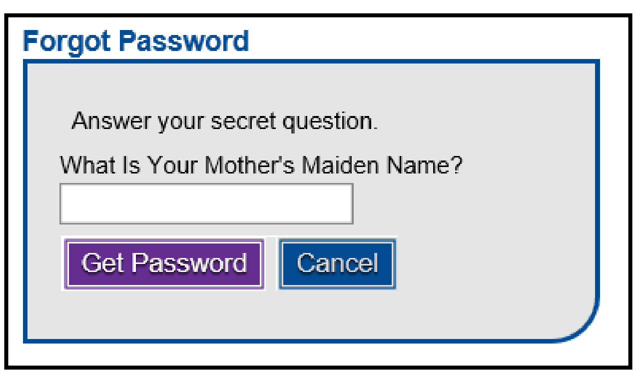
Forgotten Password

1. To retrieve a forgotten password, click the Forgot Password link.

2. Enter your User Name and click *Get Password*.

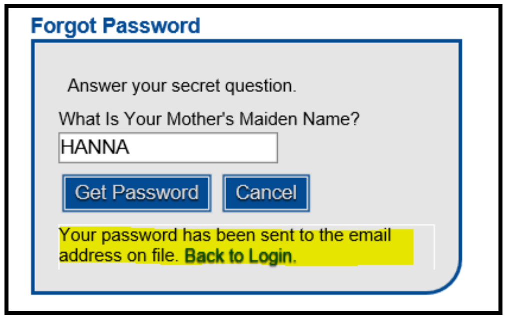


3. Next, provide the answer to your secret question. Then, click *Get Password*.



Forgotten Password, Cont'd.

4. An email will be automatically sent to the address you provided in your personal Plan Central profile.



Navigation

Main Menu

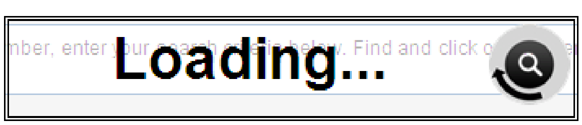
Plan Central is designed with a main menu that is always displayed near the top of the screen. Click a menu option for specific functions.

Home Page

Additional Resources may be available on the Home Page.   Refer to Page 31 of this manual for *Drug Search & Prescription Information* instructions.

Processing Data Indicator

When the application is processing data, such as search criteria, the "Loading" indicator will appear.



Automatic Sign Out

As a security measure, Plan Central automatically signs out any user who has not actively used the system for 30 minutes. Plan Central will prompt the user to log back in to the system.

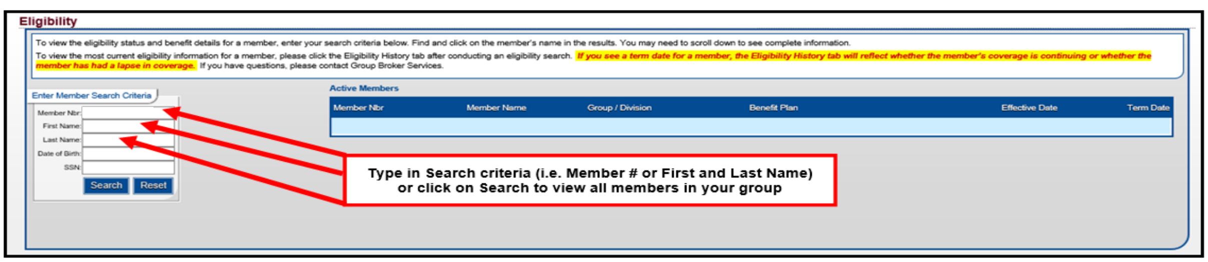
Inquiries

The drop down menu for Inquiries gives the User access to Eligibility and Invoices.

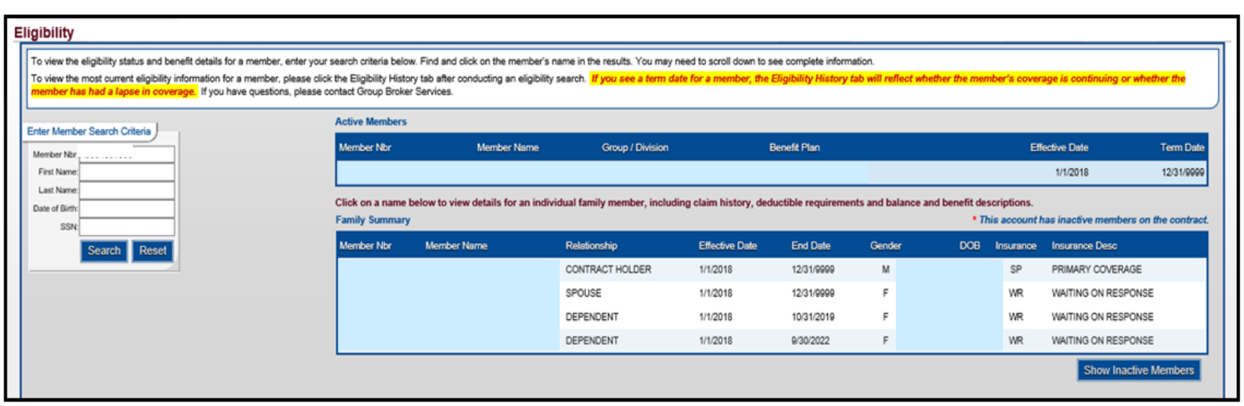
Eligibility

To determine eligibility for a member, hover over *Inquiries* and then click *Eligibility*.

Enter search criteria in the fields or click *Search* to view all members associated with your group.

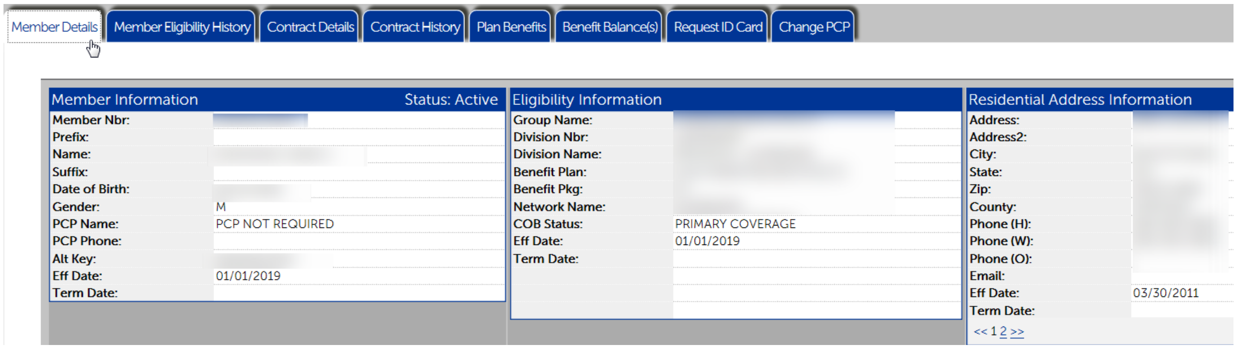


Click anywhere on the desired row to view eligibility details. If the selected member has family members enrolled in his/her plan, records for the spouse and dependent(s) will be displayed.



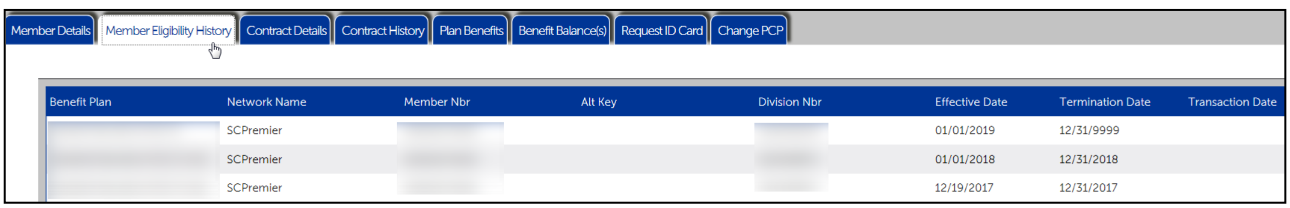
Member Details Tab

Displays the most recent biographical information for the selected member and allows you to view previous address history.



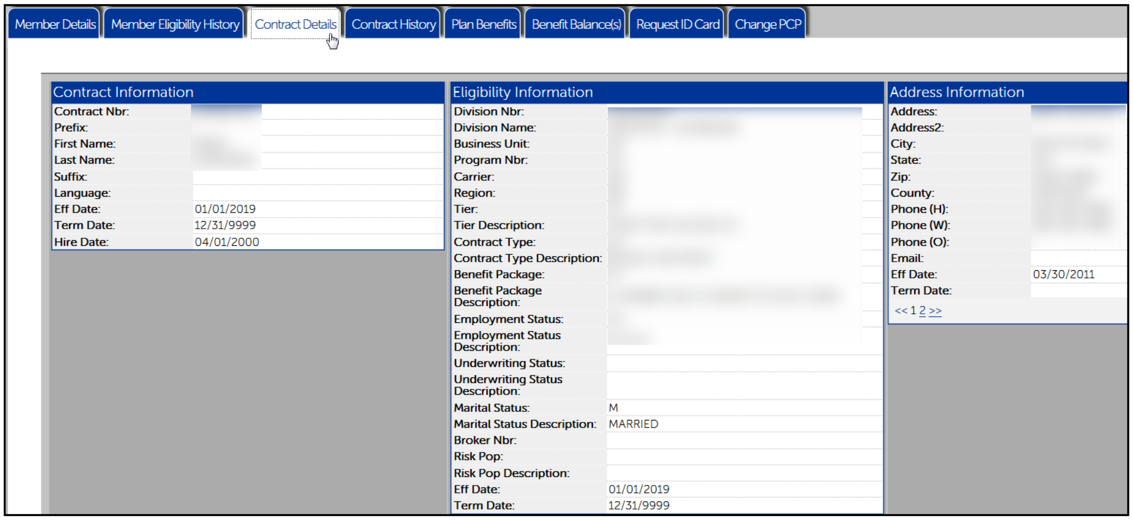
Member Eligibility History Tab

Displays the most recent eligibility information for the selected member and allows you to view previous eligibility records.



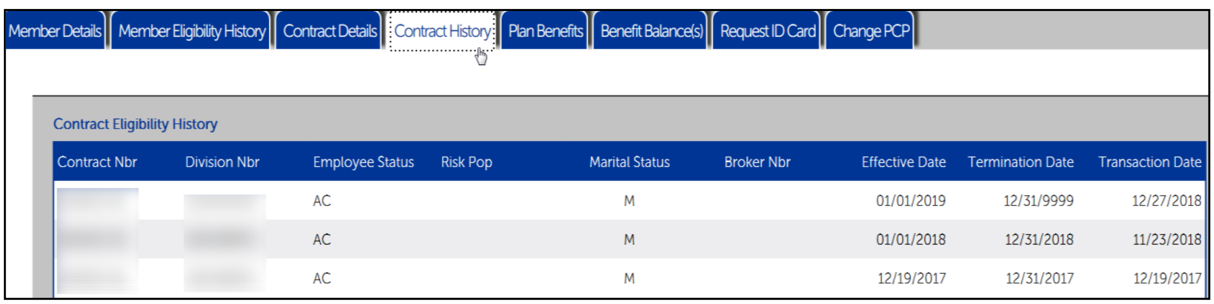
Contract Details

The Contract Details tab displays additional Eligibility information.



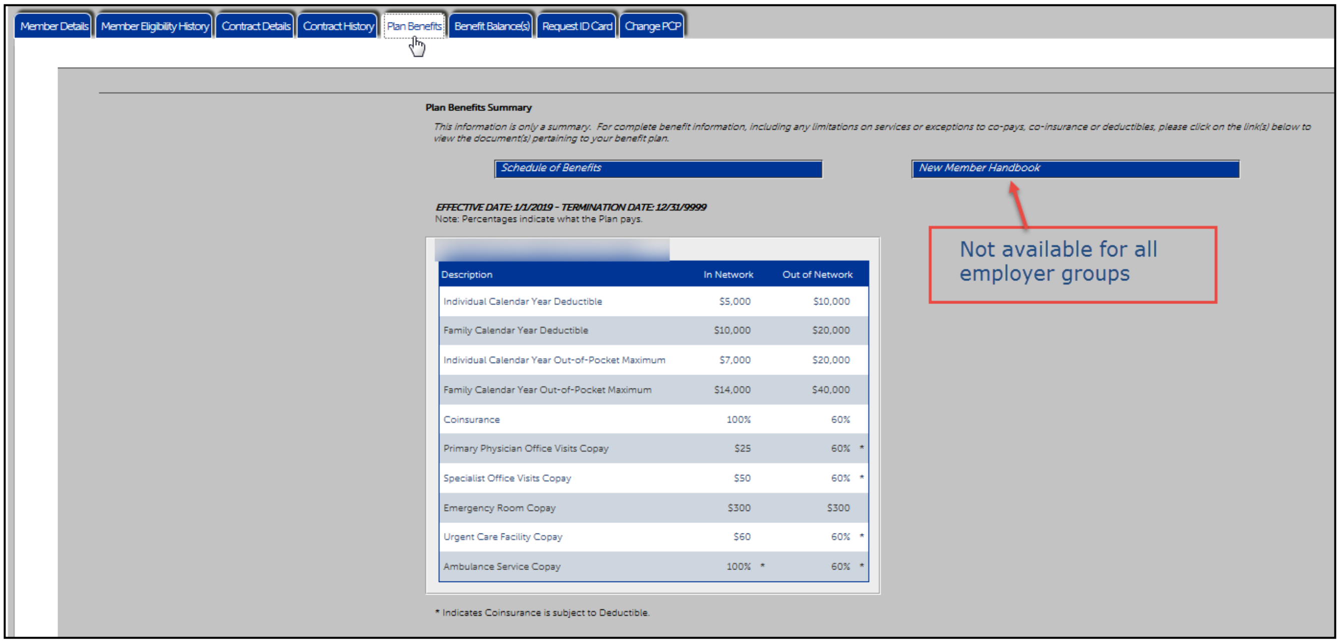
Contract History

The Contract History will display a history of the Contract Number(s), Division Number(s) Employee Status and Effective / End Dates. Selecting a line will display additional information and definitions.



Plan Benefits Tab

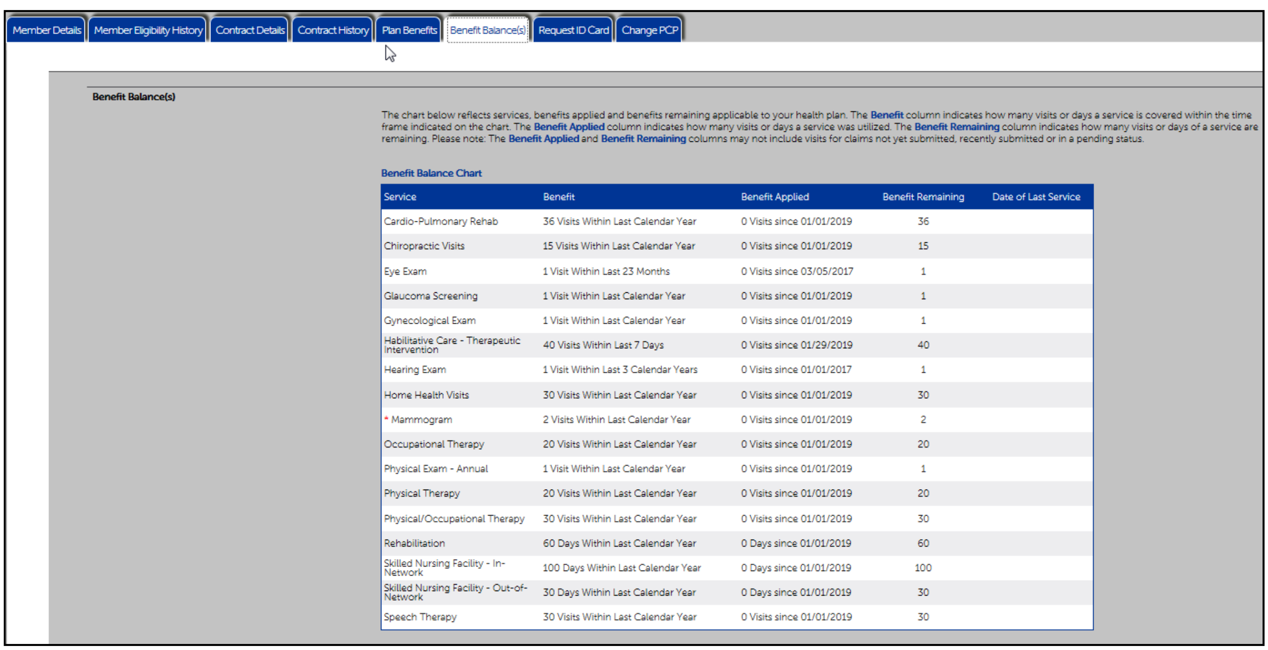
Displays summary of the member's Plan benefits.



Description	In Network	Out of Network
Individual Calendar Year Deductible	$5,000	$10,000
Family Calendar Year Deductible	$10,000	$20,000
Individual Calendar Year Out-of-Pocket Maximum	$7,000	$20,000
Family Calendar Year Out-of-Pocket Maximum	$14,000	$40,000
Coinsurance	100%	60%
Primary Physician Office Visits Copay	$25	60% *
Specialist Office Visits Copay	$50	60% *
Emergency Room Copay	$300	$300
Urgent Care Facility Copay	$60	60% *
Ambulance Service Copay	100% *	60% *

Benefit Balance(s)

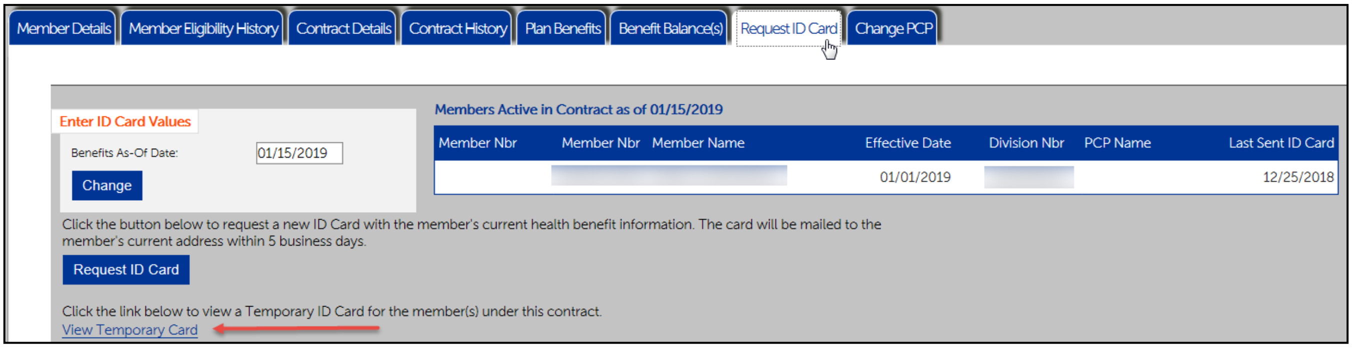
Plan Central helps keep track of office visits for benefits that have maximums, as well as the last date of service.



Service	Benefit	Benefit Applied	Benefit Remaining	Date of Last Service
Cardio-Pulmonary Rehab	36 Visits Within Last Calendar Year	0 Visits since 01/01/2019	36	
Chiropractic Visits	15 Visits Within Last Calendar Year	0 Visits since 01/01/2019	15	
Eye Exam	1 Visit Within Last 23 Months	0 Visits since 03/05/2017	1	
Glaucoma Screening	1 Visit Within Last Calendar Year	0 Visits since 01/01/2019	1	
Gynecological Exam	1 Visit Within Last Calendar Year	0 Visits since 01/01/2019	1	
Habilitative Care - Therapeutic Intervention	40 Visits Within Last 7 Days	0 Visits since 01/29/2019	40	
Hearing Exam	1 Visit Within Last 3 Calendar Years	0 Visits since 01/01/2017	1	
Home Health Visits	30 Visits Within Last Calendar Year	0 Visits since 01/01/2019	30	
* Mammogram	2 Visits Within Last Calendar Year	0 Visits since 01/01/2019	2	
Occupational Therapy	20 Visits Within Last Calendar Year	0 Visits since 01/01/2019	20	
Physical Exam - Annual	1 Visit Within Last Calendar Year	0 Visits since 01/01/2019	1	
Physical Therapy	20 Visits Within Last Calendar Year	0 Visits since 01/01/2019	20	
Physical/Occupational Therapy	30 Visits Within Last Calendar Year	0 Visits since 01/01/2019	30	
Rehabilitation	60 Days Within Last Calendar Year	0 Days since 01/01/2019	60	
Skilled Nursing Facility - In-Network	100 Days Within Last Calendar Year	0 Days since 01/01/2019	100	
Skilled Nursing Facility - Out-of-Network	30 Days Within Last Calendar Year	0 Days since 01/01/2019	30	
Speech Therapy	30 Visits Within Last Calendar Year	0 Visits since 01/01/2019	30	

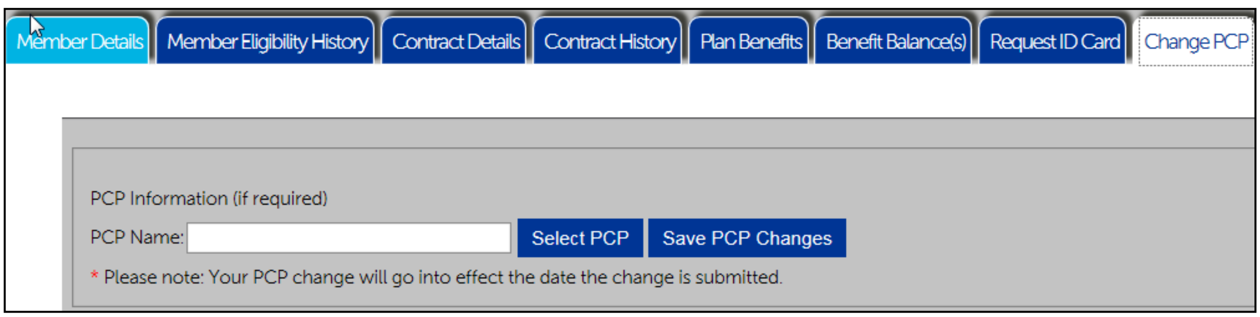
Request ID Card

Request ID Card allows a user to request a new ID card and/or print a Temporary ID Card. You will also be able to see when an ID card was issued. To view a future ID card, select the date using the drop down calendar. Next, select *Change*.



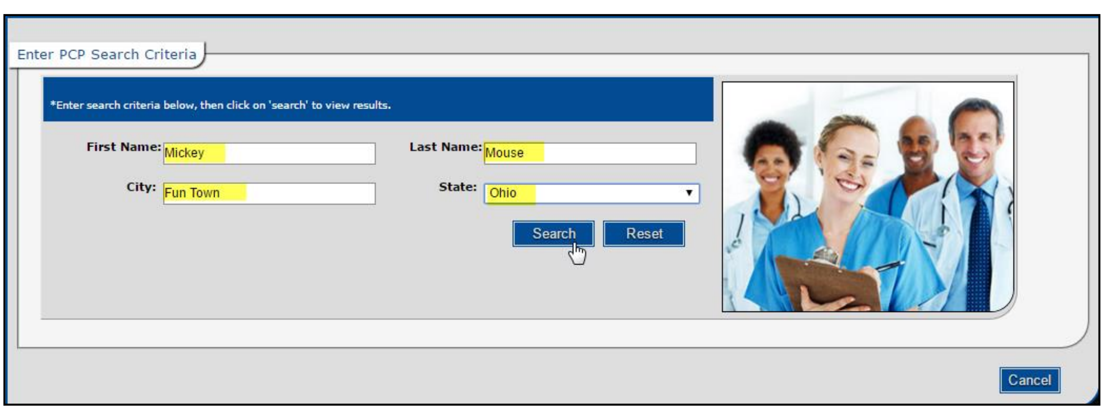
Change PCP

If your Plan requires a Primary Care Physician (PCP) be designated, the *Change PCP* tab will be visible. To select a PCP or change your current PCP, click on *Select PCP*.



Please note: Plan Central restricts a user from selecting a PCP that is NOT accepting new patients.   It is important to make sure that the PCP selected is in network for your plan. Plan Central does not block PCP changes for non-network providers. Instructions to confirm network affiliation are on Page 33 in this manual under *Find a Doctor or Hospital*.

Fill in your search criteria then click on *Search* to view the results.



Printer Friendly Version

Click the printer icon located on the right side of the page to print the selected member's eligibility information.

Invoices

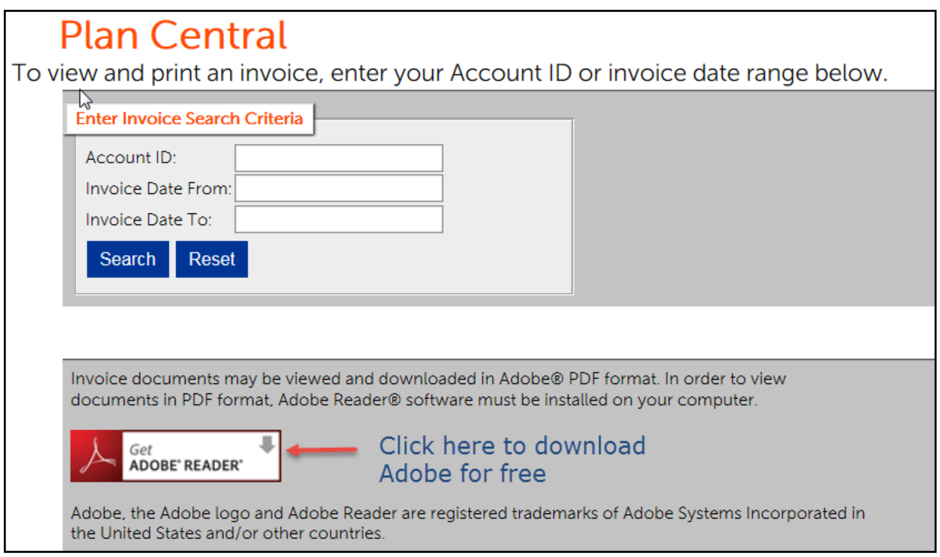
Employers who currently do not receive electronic invoices from SummaCare have access to the Invoices tool in Plan Central.

> ***Please note***: *In order to view and/or download an invoice, Adobe Reader software must be installed on your computer. You can download this software for free via the link found on the Invoices page.*

1. To view invoices for your group, click *Invoice* from the Inquiries drop down menu.

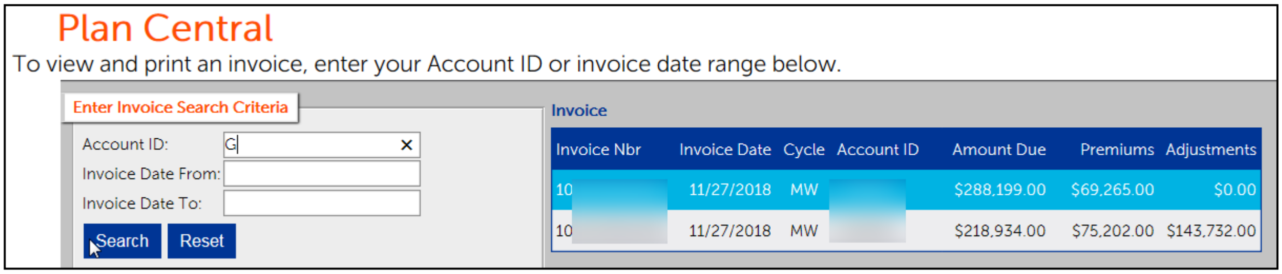
2. Enter your search criteria or click *Search* to view all invoices associated with your account.

Tip:	*Your Account ID is the group or division number at which you are billed.* *If you have multiple accounts listed under your login (example: having 5 different divisions billed separately to you), the search results will contain all of the invoices for all of the groups/divisions associated with your Account ID.*

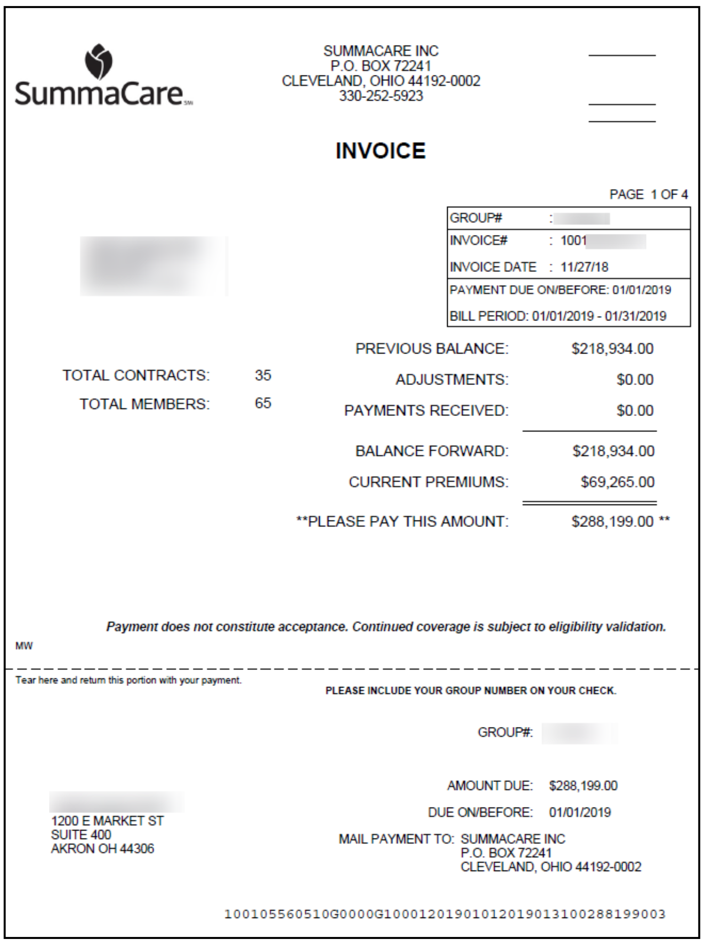


Invoices, Cont’d.

The search results for invoices will appear. Select the invoice you wish to view.



A PDF of the entire invoice launches for viewing or printing.



SummaCare

SUMMACARE INC
P.O. BOX 72241
CLEVELAND, OHIO 44192-0002
330-252-5923

INVOICE

PAGE 1 OF 4

GROUP# :
INVOICE# : 1001
INVOICE DATE : 11/27/18
PAYMENT DUE ON/BEFORE: 01/01/2019
BILL PERIOD: 01/01/2019 - 01/31/2019

TOTAL CONTRACTS:	35
TOTAL MEMBERS:	65

PREVIOUS BALANCE:	$218,934.00
ADJUSTMENTS:	$0.00
PAYMENTS RECEIVED:	$0.00
BALANCE FORWARD:	$218,934.00
CURRENT PREMIUMS:	$69,265.00
**PLEASE PAY THIS AMOUNT:	$288,199.00 **

Payment does not constitute acceptance. Continued coverage is subject to eligibility validation.

MW

Tear here and return this portion with your payment.

PLEASE INCLUDE YOUR GROUP NUMBER ON YOUR CHECK.

GROUP#:

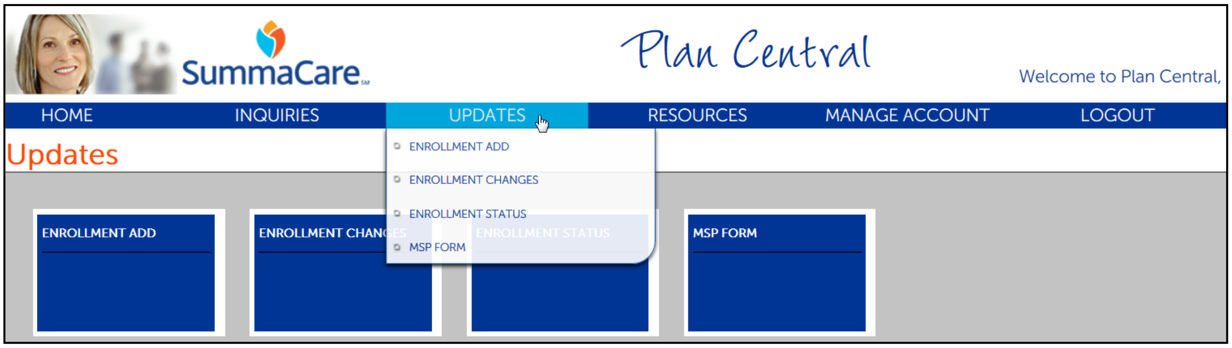
AMOUNT DUE: $288,199.00
DUE ON/BEFORE: 01/01/2019
MAIL PAYMENT TO: SUMMACARE INC
P.O. BOX 72241
CLEVELAND, OHIO 44192-0002

1200 E MARKET ST
SUITE 400
AKRON OH 44306

100105560510G0000G100012019010120190131002881990003

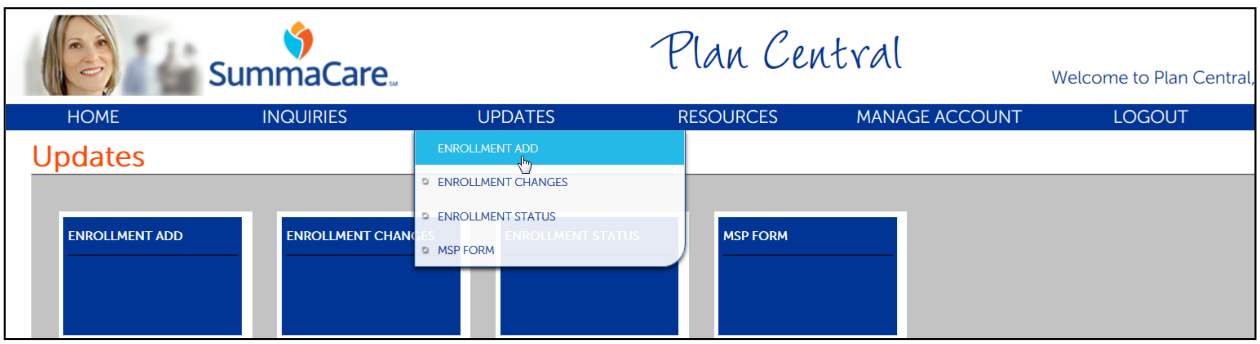
Updates

From the Updates menu, you can add members to the plan, change demographic data, view the status of enrollment changes, search for existing MSP Forms or create new MSP Forms.

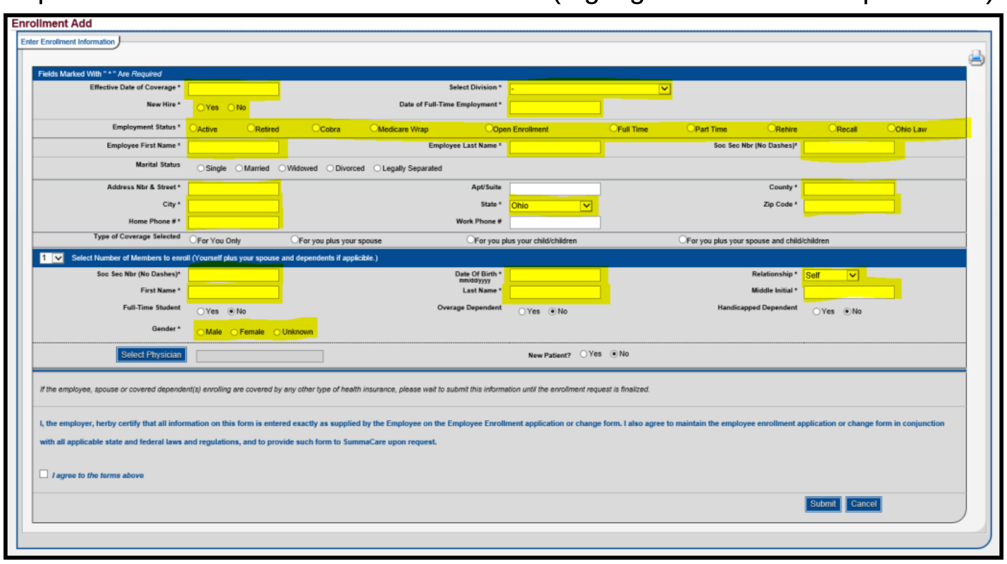


Adding Members to the Plan

1. Hover over the *Updates* menu and then click *Enrollment Add*.

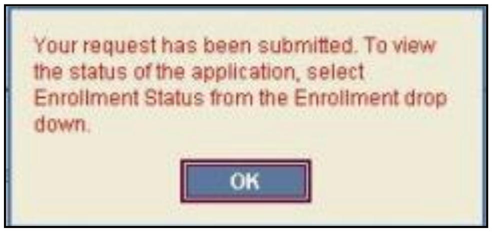


2. Complete the fields marked with an asterisk (highlighted in the example below).



Adding Members to the Plan, Cont'd.

3. Click *Submit* to send the enrollment add request to SummaCare. The following message will be displayed.

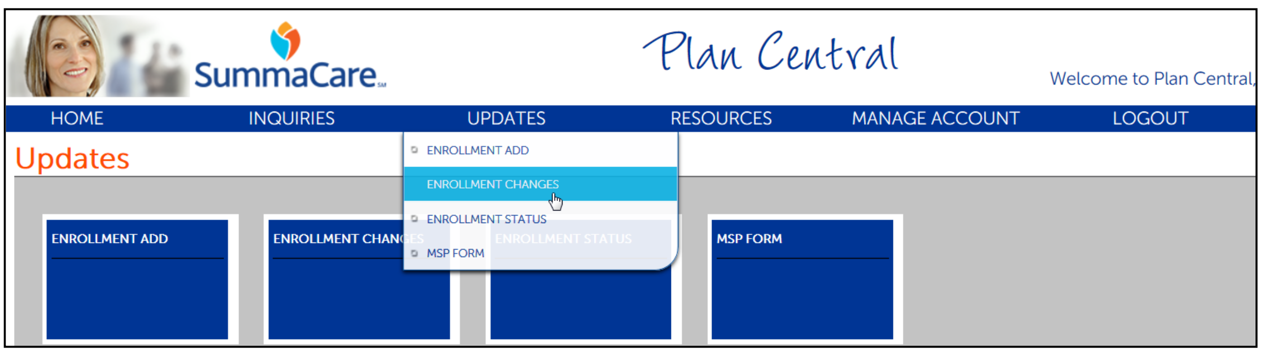


4. The *Enrollment Add* page will continue to display with the member you just added. To verify the request was submitted, click *Updates*, *Enrollment Status*. (Instructions to follow.)

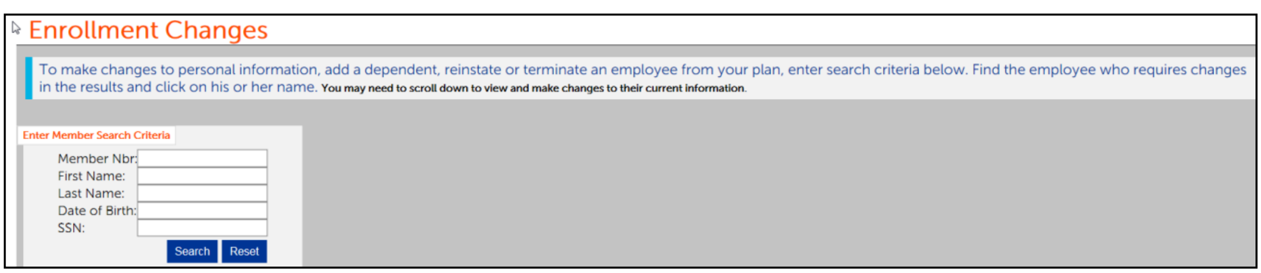
Making Enrollment Changes

To make changes to employee information, add a dependent, or to reinstate or terminate an employee from your plan, follow the steps below.

1. Select *Enrollment Changes* from the *Updates* menu.

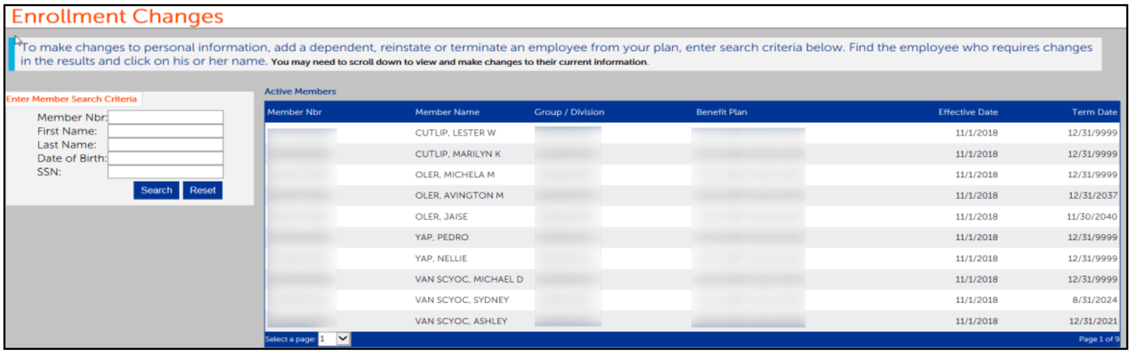


2. Enter criteria in the appropriate fields and then click *Search*. If you wish to view all members on your plan, do not enter criteria in the fields and then click *Search*.

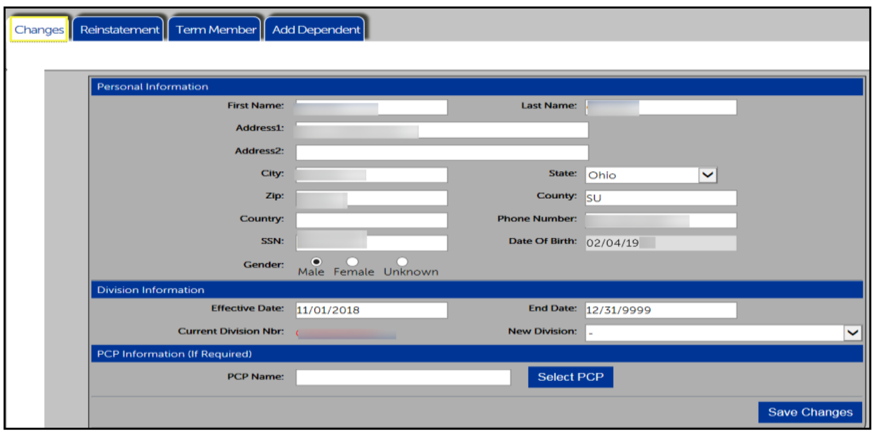


Making Enrollment Changes, Cont'd.

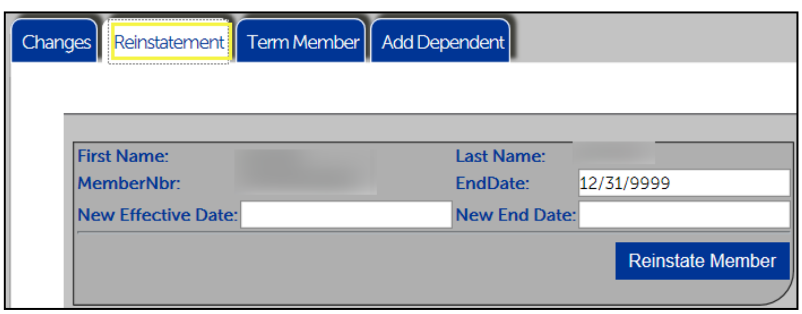
3. Click anywhere on the desired row of the search results to view eligibility details.



4. Click the *Changes* tab to update the member's name, SSN, date of birth, gender, or PCP information. Fields indicated with grey text cannot be updated in Plan Central. Please contact your Account Manager to request changes to data within these fields.



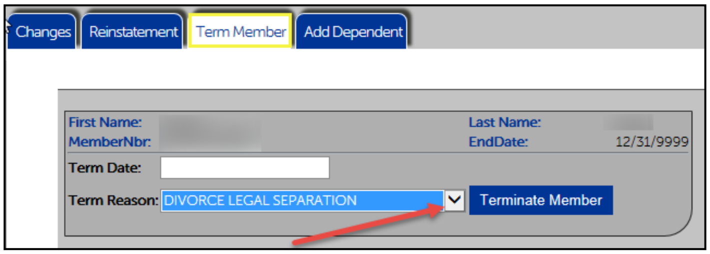
5. To reinstate an inactive member, click the *Reinstatement* tab. Then, enter the new effective and end dates and click *Reinstate Member*.



6. A confirmation message will be displayed. Click *OK* to continue.

Making Enrollment Changes, Cont'd.

7. Click the *Term Member* tab to terminate a member from your group's plan. Enter the term date, select the Term Reason from the drop down list and then click *Terminate Member*.



List of termination reasons to choose from:

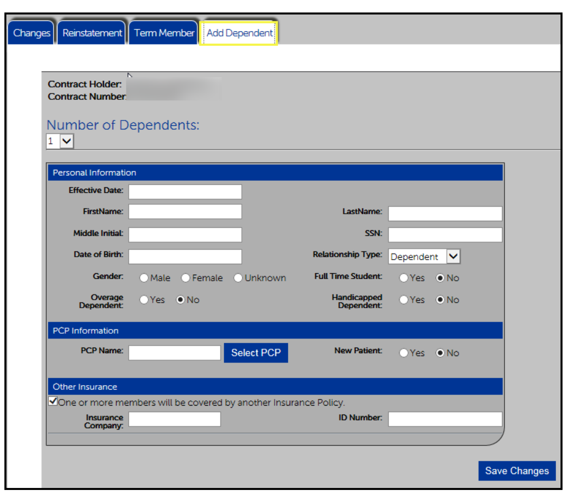
DIVORCE LEGAL SEPARATION
DEATH
INELIGIBLE DEPENDENT
MEDICARE
TERMINATION
RETIREMENT
REDUCTION IN HOURS – STATUS CHANGE
REDUCTION IN FORCE
BANKRUPTCY
STATE CONTINUATION
LOSS OF ELIGIBILITY
REDUCTION IN HOURS – END OF LEAVE
WORK STOPPAGE
USER RA - TERMINATION
USER RA – REDUCTION IN HOURS
INVOLUNTARY TERMINATION
TERMINATION WITH SEVERANCE
RETIREE BANKRUPTCY

User RA – Termination = Leaves the employer either temporary or for an indefinite amount of time due to service in the Military Uniformed Services.

User RA - Reduction in Hours = The employee is no longer able to meet the 30 hour per week requirement of eligibility for health benefits due to service in the Military Uniformed Services.

A confirmation message will be displayed. Click *OK* to continue.

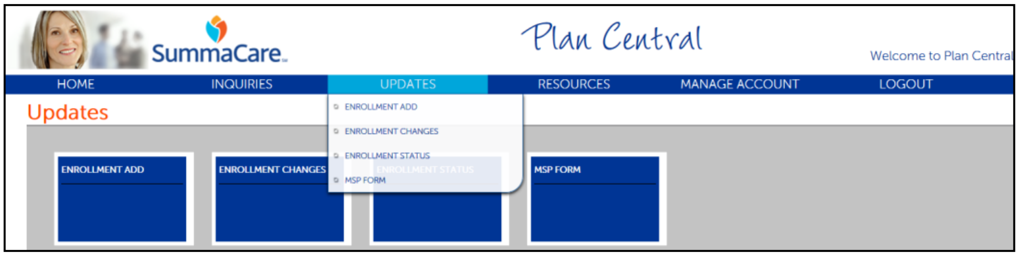
8. Click the Add Dependents tab to add a dependent of the contract holder's family to your plan. Complete the form and click the *Save Changes* button.



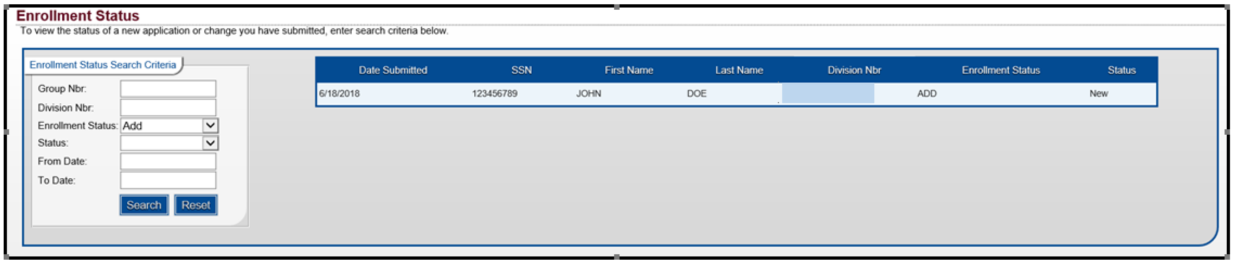
Enrollment Status

The Enrollment Status tool allows you to view members with the following statuses: *Add, Add Dependent, Change, Terminate, Reinstate.*

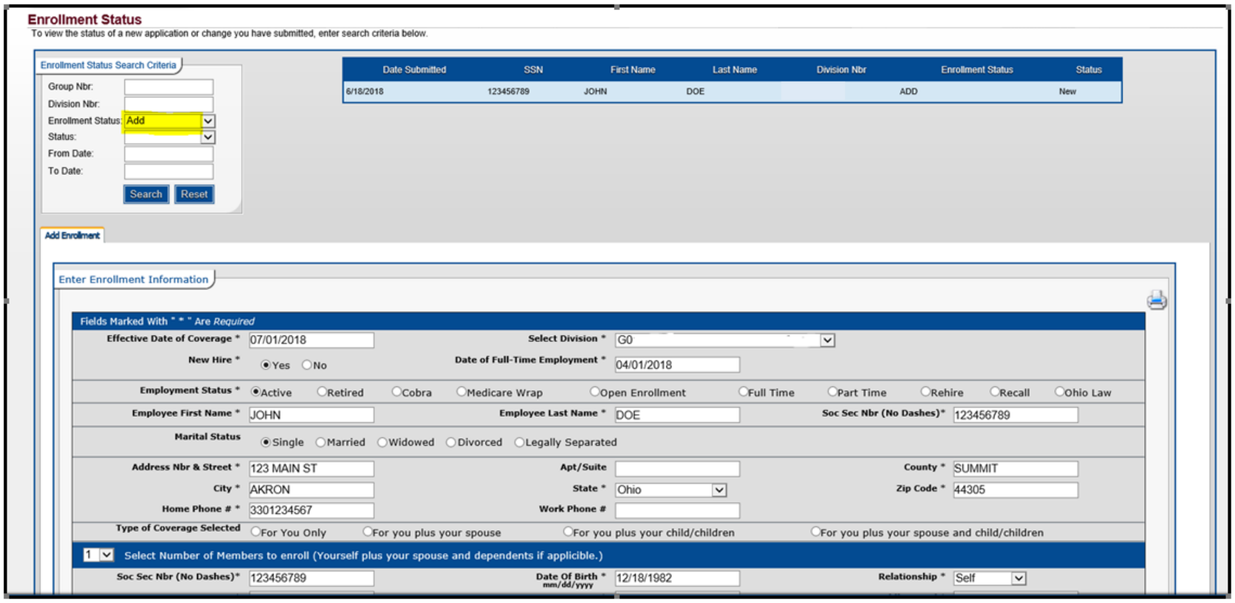
1. Hover over the *Updates* menu and then click *Enrollment Status*.



2. Enter search criteria and then click *Search*. In the example below, the page was populated with all members with the *Add* status.

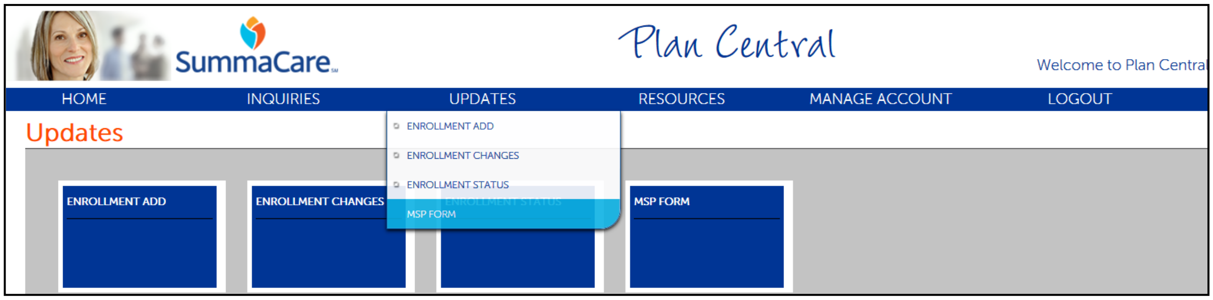


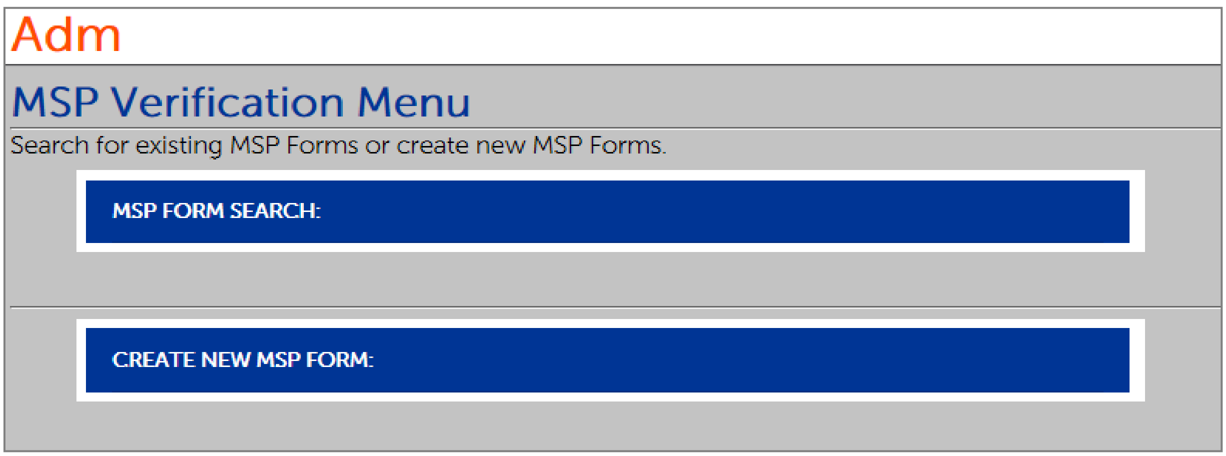
3. Click the desired row to view details of the enrollment transaction.



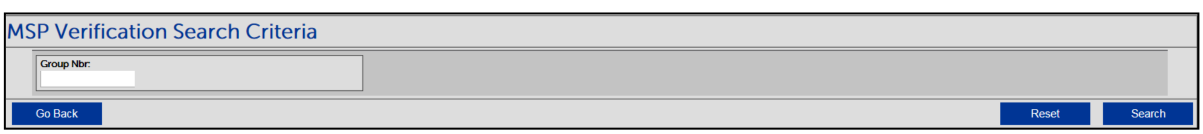
MSP Form

To search for existing MSP Forms or create new MSP Forms, click *MSP FORM* from the UPDATES section of the Main Menu.





To search for an existing form click *MSP Form Search:* Key the Group Number and click *Search*.



To create a new MSP Form click *Create New MSP Form:* populate the required fields on the form and click *Submit.*

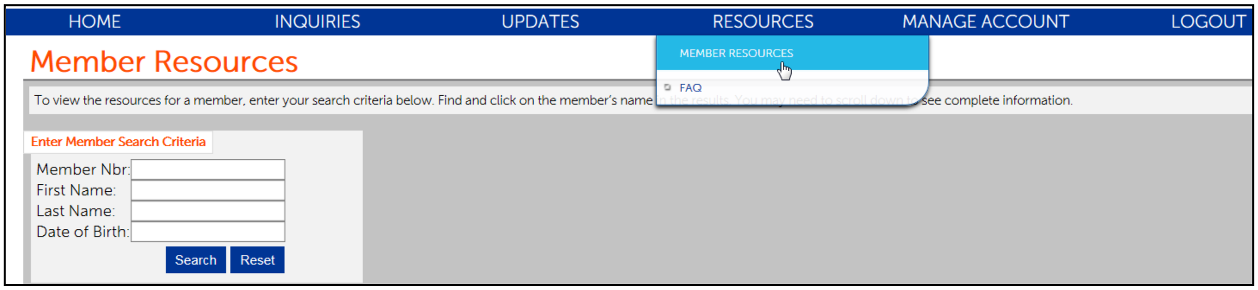
Resources

Member Resources

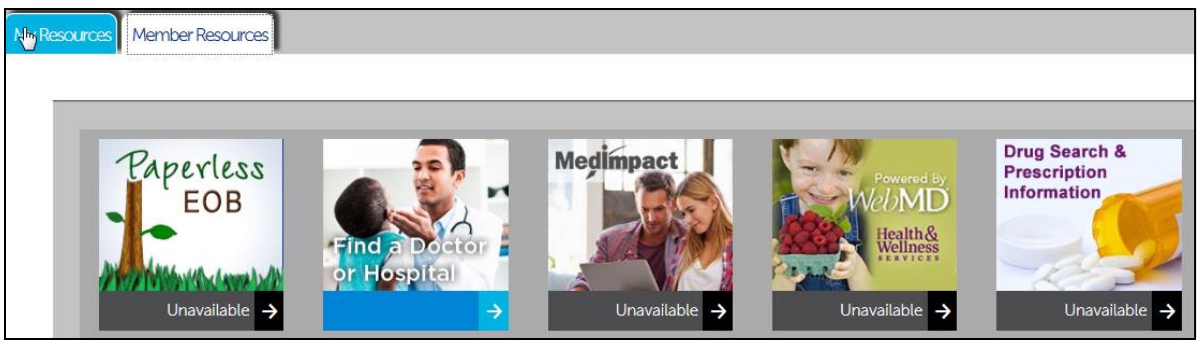
Click on *Member Resources* under the *Resources* tab to view the resources for a member.

Enter Member Search criteria or click *Search* to view all users.

Find and click on the member's name in the results. You may need to scroll down to see complete information.



Please note that not all resources are available for a member.

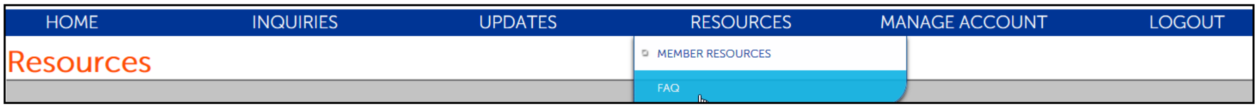


If SummaCare manages your group's Prescription Drug coverage, you can search for information about a particular medication by clicking on the *MedImpact* icon. The search will be facilitated via **medimpact.com** and will be launched in a separate window.

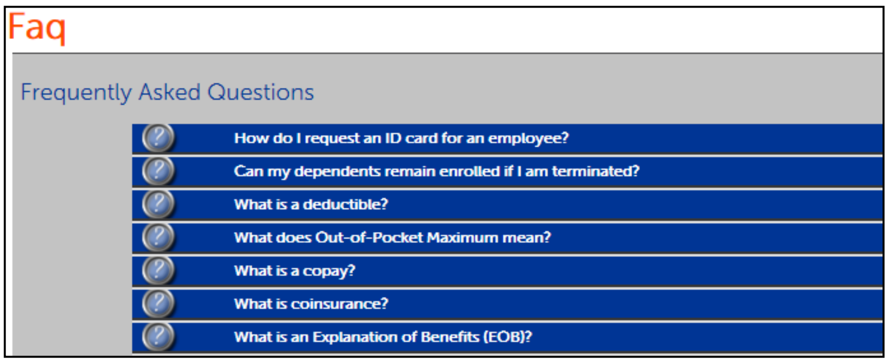
Drug Search & Prescription Information instructions can be found on Page 32 in this manual.

Frequently Asked Questions

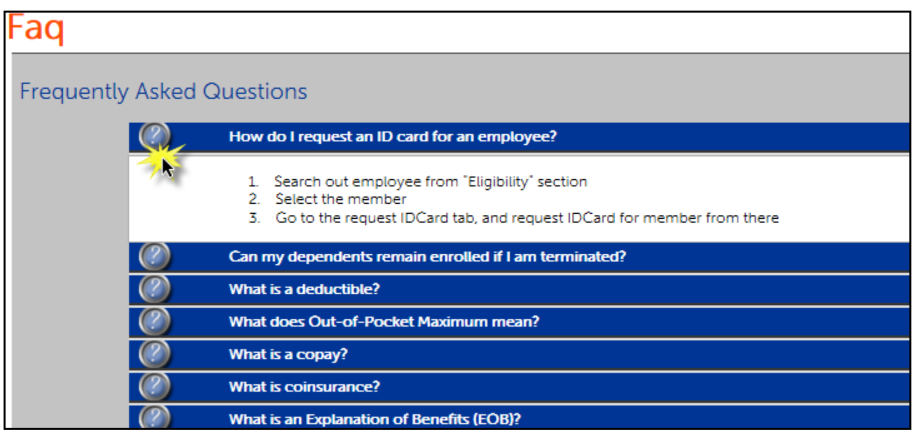
Click on FAQ from the Resources tab to access the list of Frequently Asked Questions.



Click anywhere in the line of the topic that best fits your question.

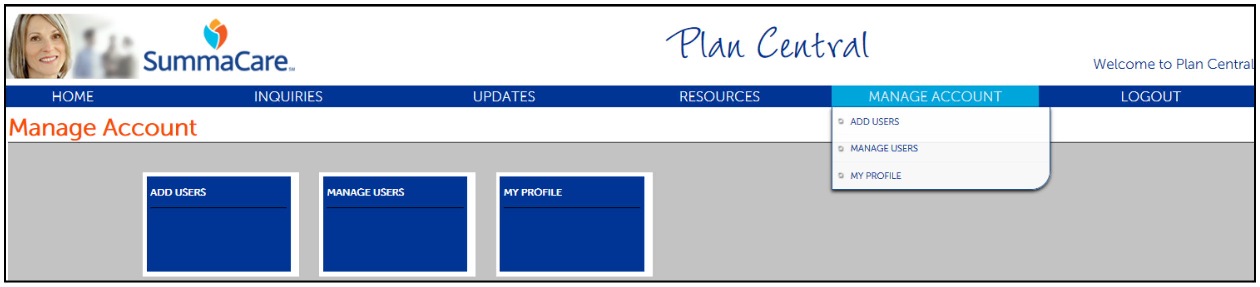


The response will appear below the question.



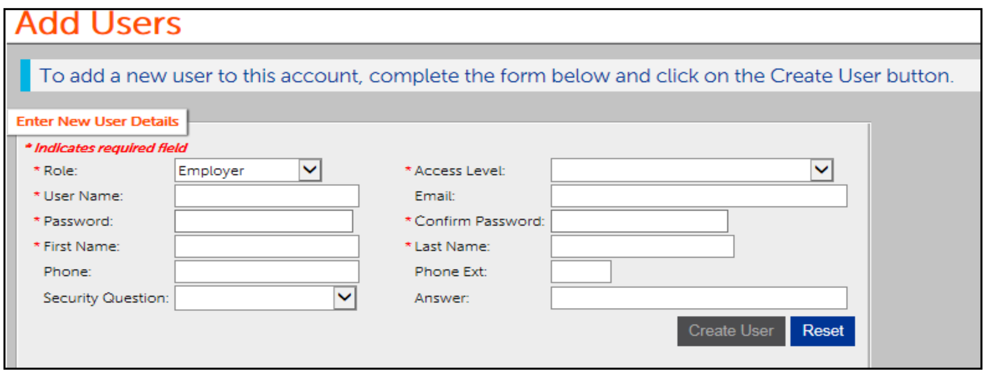
Managing Group Account(s)

The Manage Account menu provides functions for the following: adding new Plan Central users to your group's account, viewing Plan Central users associated with your account, controlling the type of access granted to your account users, and managing your own Plan Central profile.



Add Users

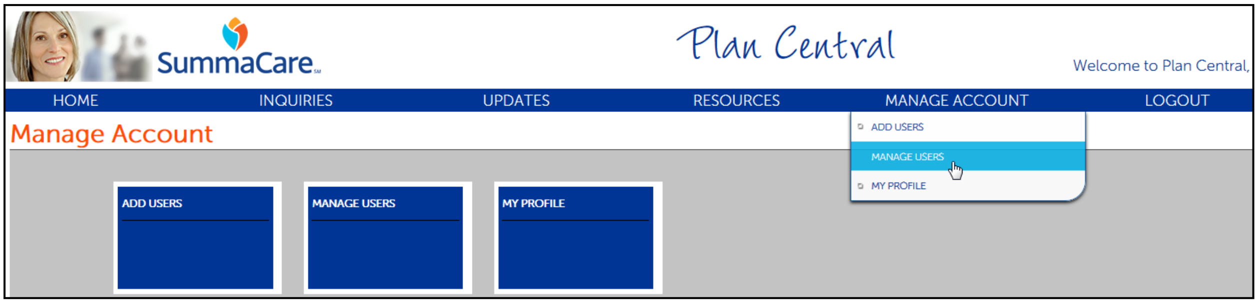
New User accounts can be created by clicking on *Add User* from the Manage Account drop down menu. Complete the form and click on the *Create New User* button.



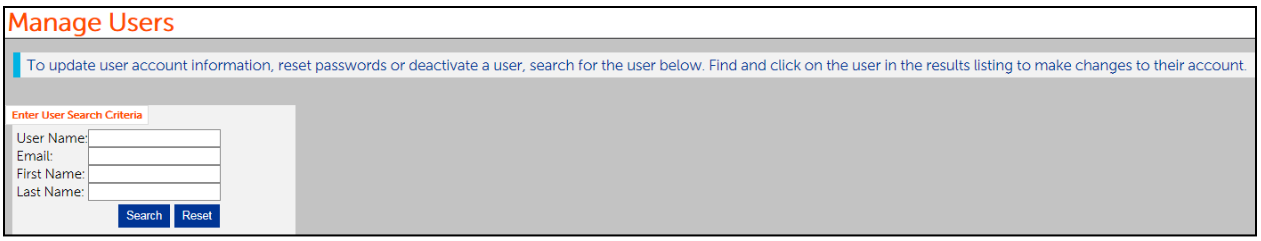
The new User will receive an email with a User Name, temporary Password, and a link to Plan Central.

Manage Users

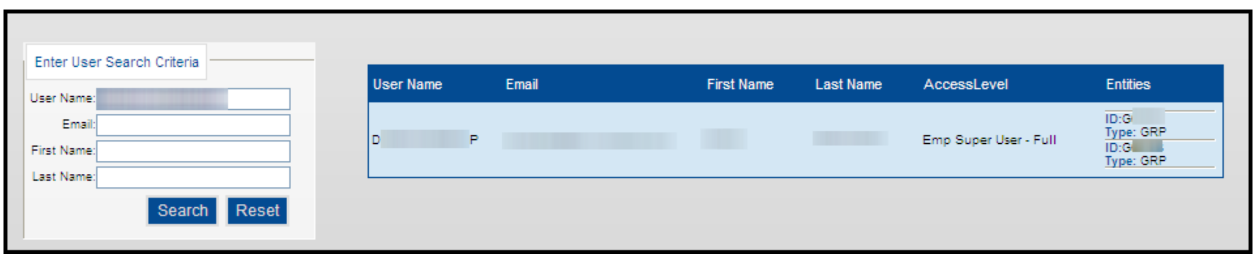
1. View existing Plan Central users associated with your group by clicking the *Manage Users* menu option.



2. Enter search criteria or click *Search* to view all users.

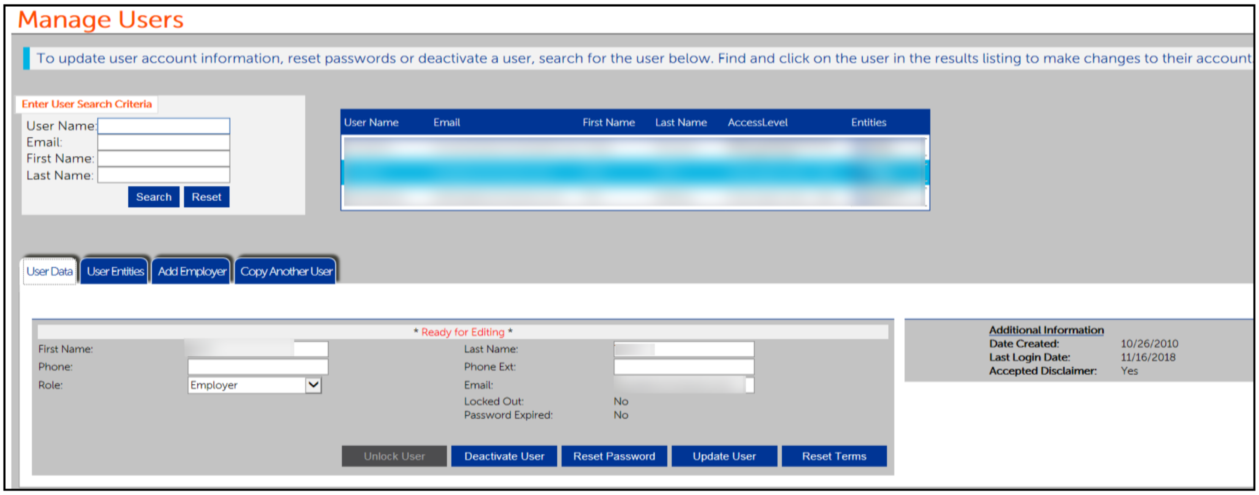


3. Select the user you wish to view.

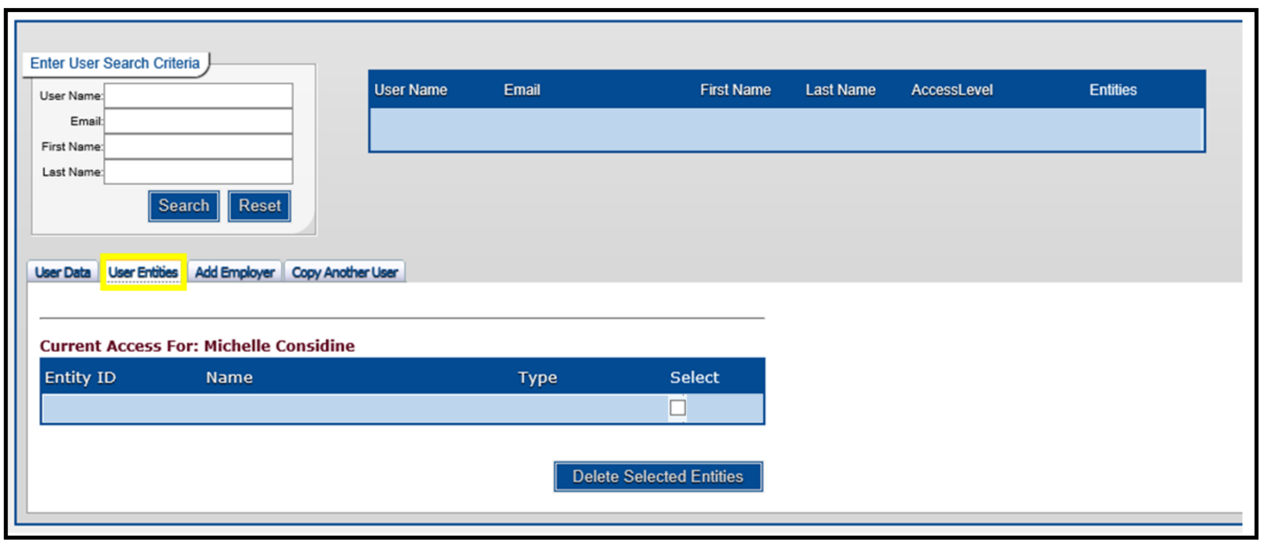


Manage Users, Cont'd.

4. The User Data panel allows you to change the user's name, phone number, email address, and Plan Central access role. You can also reset the password and unlock a locked user account. In addition, you can discontinue the user's Plan Central account access by clicking *Deactivate User*.

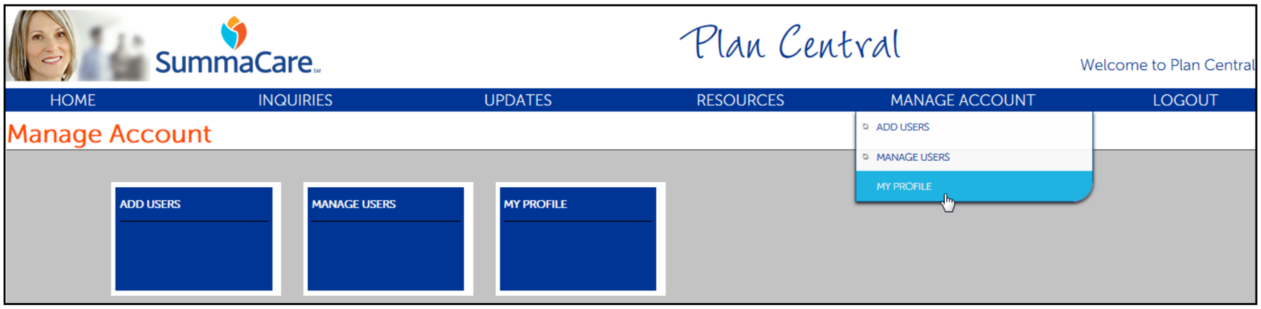


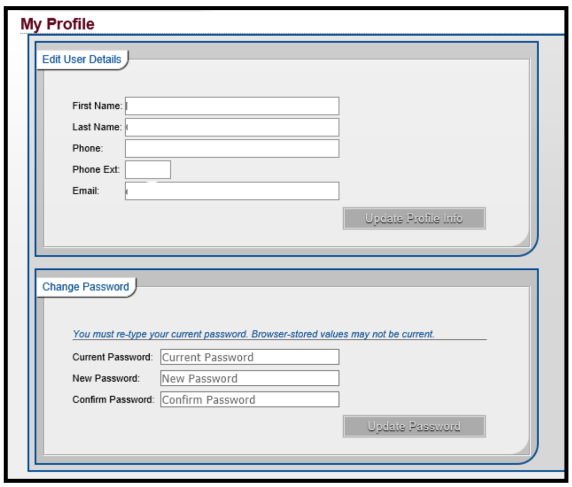
5. To remove the user's access, click the *User Entities* tab. Click the Select checkbox, and then click *Delete Selected Entities*.



My Profile

Access the My Profile page to change your name, phone number, email address, or password. Hover over *Manage Account* then click *My Profile* to view the profile.
The password must be alphanumeric and between 8 – 12 characters in length including 1 number, 1 upper case, and 1 lower case.





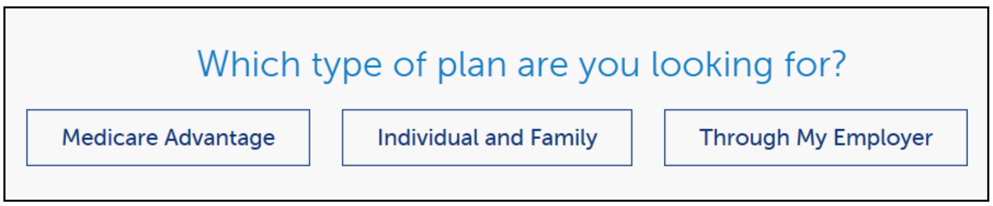
Drug Search

Use the Drug Search tool to view formulary information on prescription drugs.

Click *Home* on the main toolbar. Click *Drug Search & Prescription Information*.

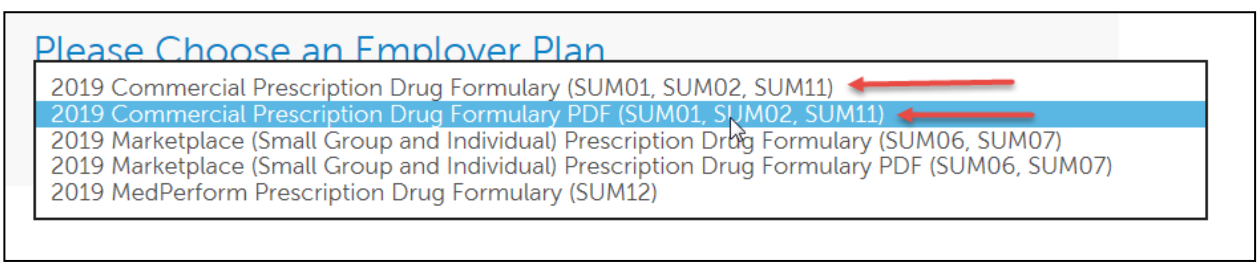
The Drug Search is facilitated via www.summacare.com.

Click on *Through My Employer*.



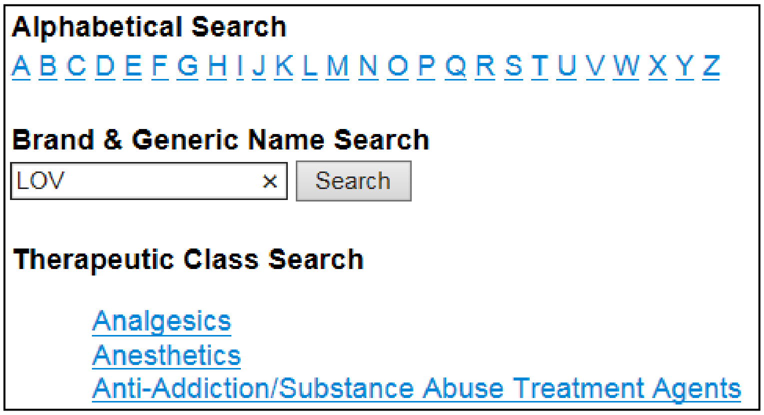
To determine what formulary/drug list to search, please refer to the RxGRP code on the SummaCare Member ID card and search/view the formulary with the corresponding code.

The search tool can be used to look up specific drug names. The Drug Formulary PDF is a comprehensive listing by drug class of approved formulary medications under the Prescription Drug Benefit.



Brand & Generic Name Search using the Search tool

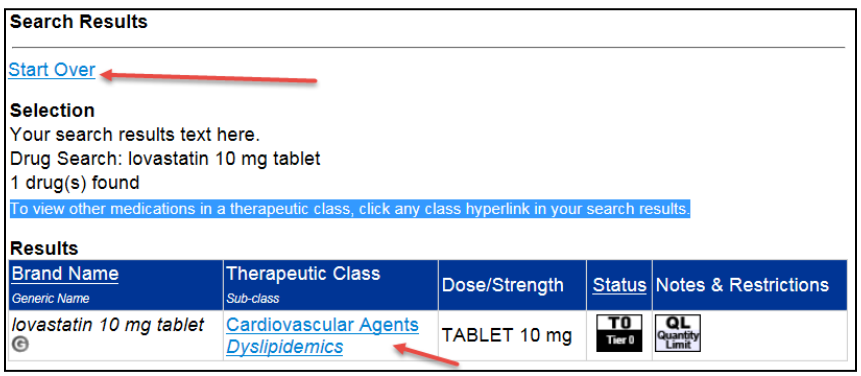
Enter the first few letters of a drug name to display matches. Click the drug you wish to conduct the search on.



The search results will be displayed. Generics drug names are in *italics*. Click the desired drug name (includes dosage).

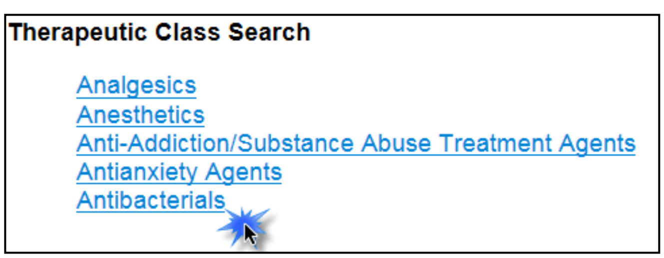
Drug details, such as tier level, quantity limits and prior authorization requirements will be displayed. To view other medications in a therapeutic class, click any class hyperlink in your search results.

- Click *Start Over* to return to the summarized search results.



Therapeutic Class Search

Click the therapeutic class you wish to view.



Therapeutic Class Search, Cont'd.

If applicable, select a subclass.

Please select a subclass from the list below to continue.

- Aminoglycosides
- Antibacterials, Miscellaneous
- Cephalosporins
- Macrolides
- Miscellaneous B-Lactam Antibiotics
- Penicillins
- Quinolones
- Sulfonamides
- Tetracyclines

Alphabetical Search

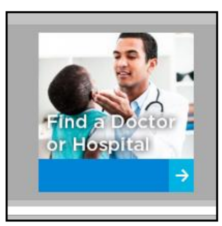
Alternatively, click on the first letter of the drug name to search.

Alphabetical Search

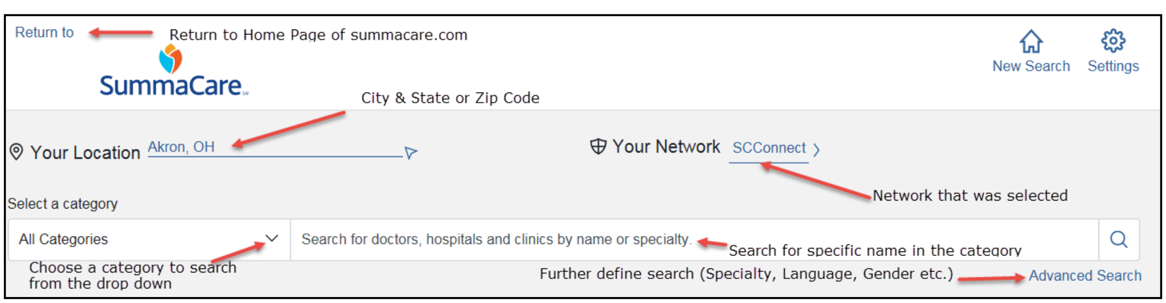
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Find a Doctor or Hospital

Click *Home* on the main toolbar. Click on *Find a Doctor or Hospital*. You will be directed to SummaCare's Provider Search tool to see if a particular provider is in the member's network.

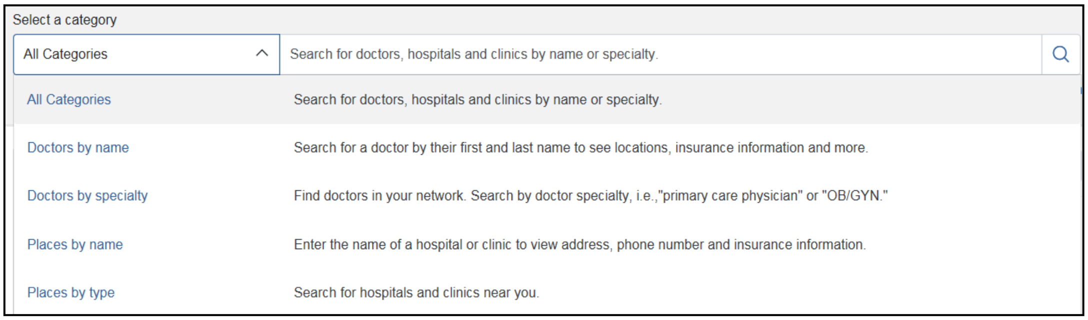


Enter Search Criteria. Choose a category to search from the drop down. Optionally, search for a specific name and perform an Advance Search.

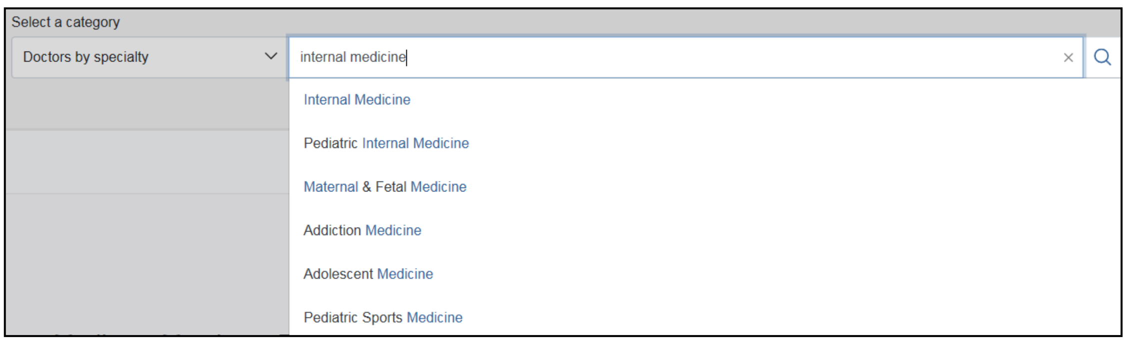


Find a Doctor or Hospital, Cont'd.

Below is the list of Categories to choose from the drop down.

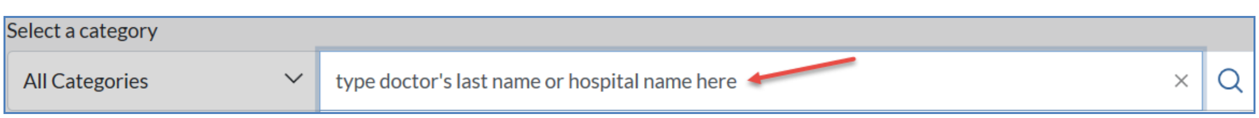


For example, select *Doctors by specialty* Category and key a specialty.



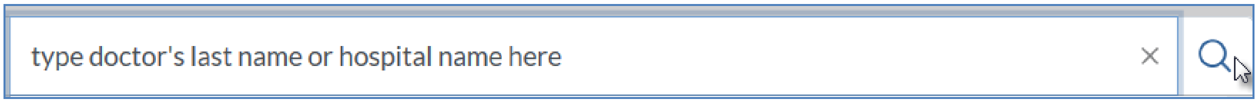
The default search result display is distance; however other sort options are available. Email, print or download a pdf of the directory with an option to deselect and select results to be included.

For a specific doctor or hospital name, type the last name of the doctor or the name of the hospital in the search field provided.

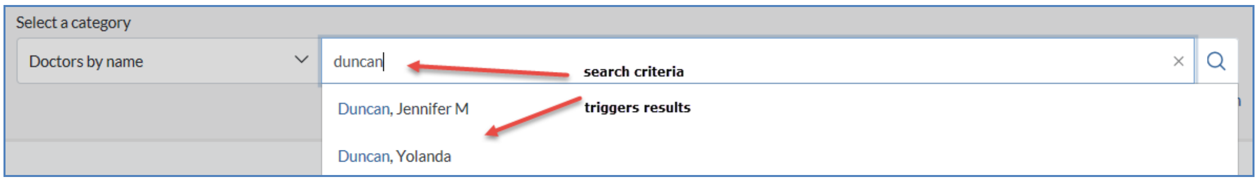


Find a Doctor or Hospital, Cont'd.

Click the magnifying glass icon or press Enter to view the search results.



There is an autofill feature.



If a provider appears in the search results, that provider is in the selected network.

Contacting SummaCare

Click the Contact Us link, which is always available at the bottom of the page on www.summacare.com.

You may also contact your account manager if you have questions regarding Plan Central.

Logging Out

To exit Plan Central, click the LOGOUT link. The session will be terminated and the Welcome page will be displayed.