Guide to using

the plan administrator website

ALBERTA BLUE CROSS®

Contents

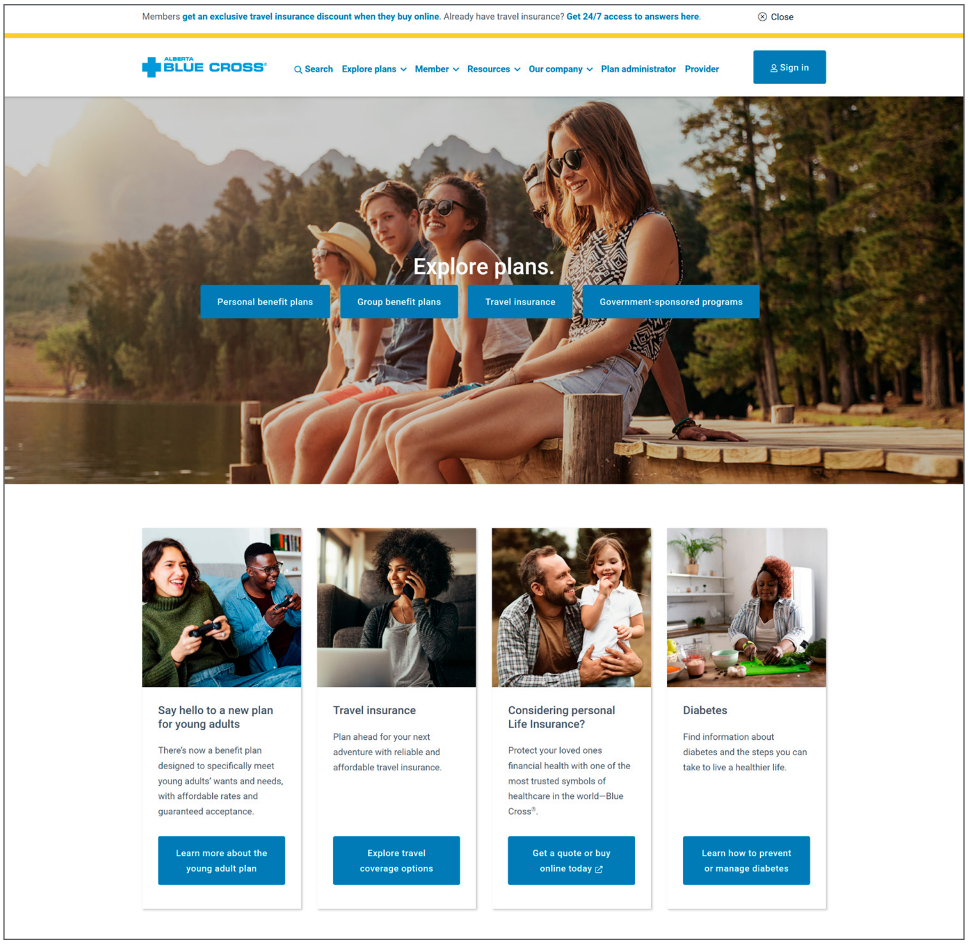
Chapter 1: Introduction

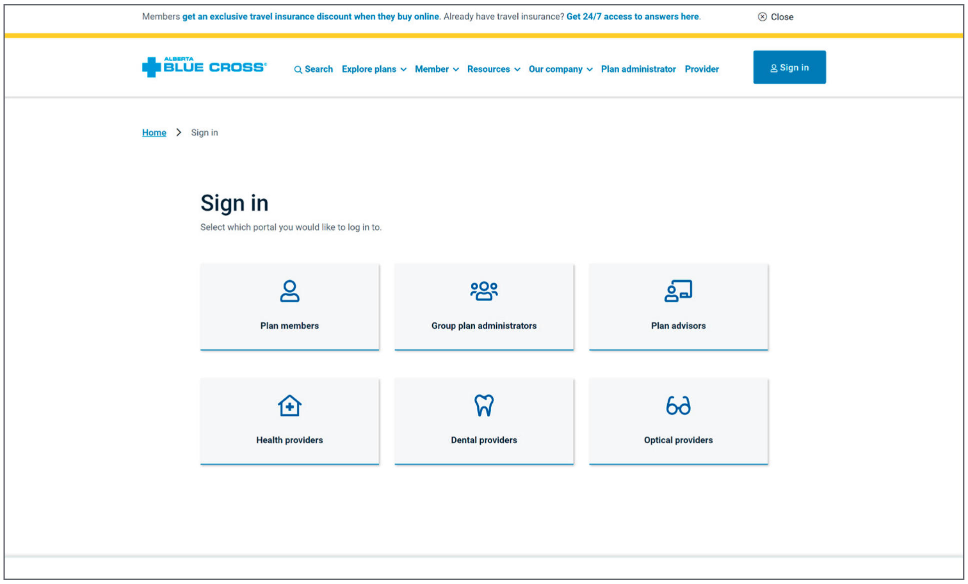
Advantages of updating through the Alberta Blue Cross secure website

The web site for plan administrators has been designed to balance your need for convenience and ease of use with the necessity of maintaining the security of your plan members' information. Through the site, you have 7-day-a-week access for submitting employee eligibility information, checking the status of recent updates to employee files, ordering new Alberta Blue Cross ID cards, viewing your plan's Statements of Account, and more. In addition, tracking updates and changes to plan member's files has never been easier because each update submitted through the site receives a unique confirmation number.

The website address

Go to **www.ab.bluecross.ca** then click the ***Sign in*** button in the top right-hand corner and choose ***Group plan administrators***.





Balancing convenience and security

The Terms of Use outlined near the end of this document are intended to establish operating procedures that appropriately restrict access to confidential information and clearly explain the rights and responsibilities of all parties involved. The Terms of Use may be amended occasionally, so please refer to the website for the most up-to-date version.

All information accessed through the website is confidential and is intended for your use only as the group's plan administrator.

Keep your file copies

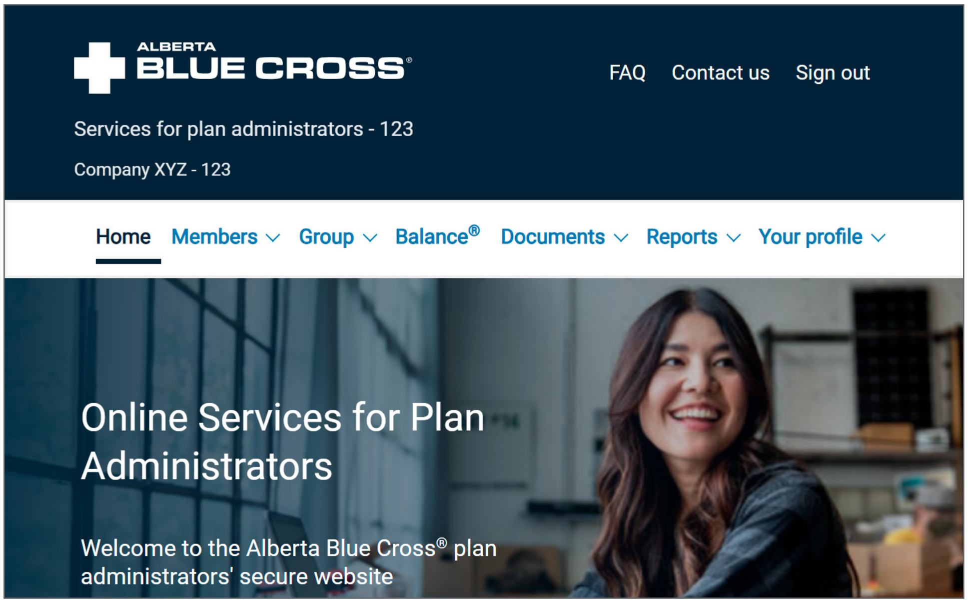
Although employee transfers, enrolments, terminations, reinstatements and information updates can be submitted through the website, it is important to keep original signed and dated applications and change forms on file in case they are requested. Failure to provide necessary support documents when requested could affect coverage provided.

Please refer to the Terms of Use at the end of this document and on the website for a description of document retention requirements.

Chapter 2: Summary of site features

Tip: Ensure pop-up's are enabled.

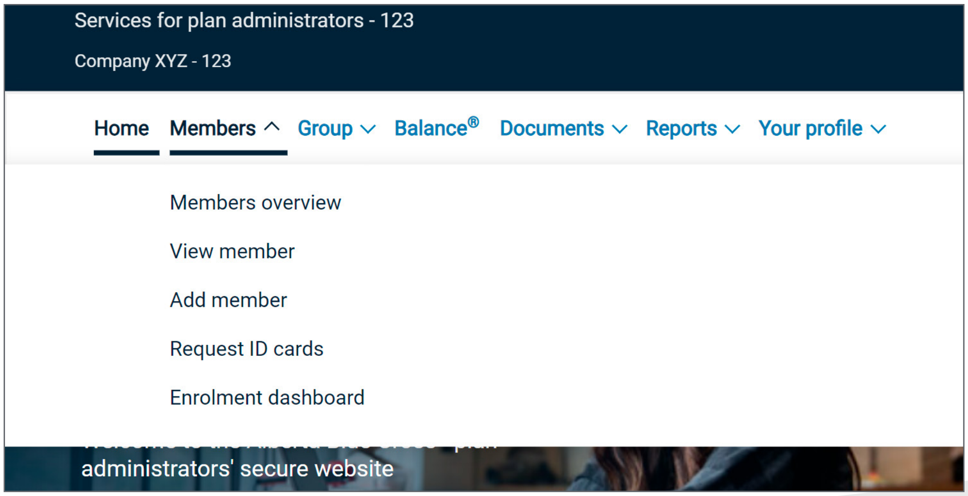
At the top of each page, there is a menu with the following main headings:



Home—This is the first page of the website. It contains links to most of the content in the site.

Member—View member information including the following:

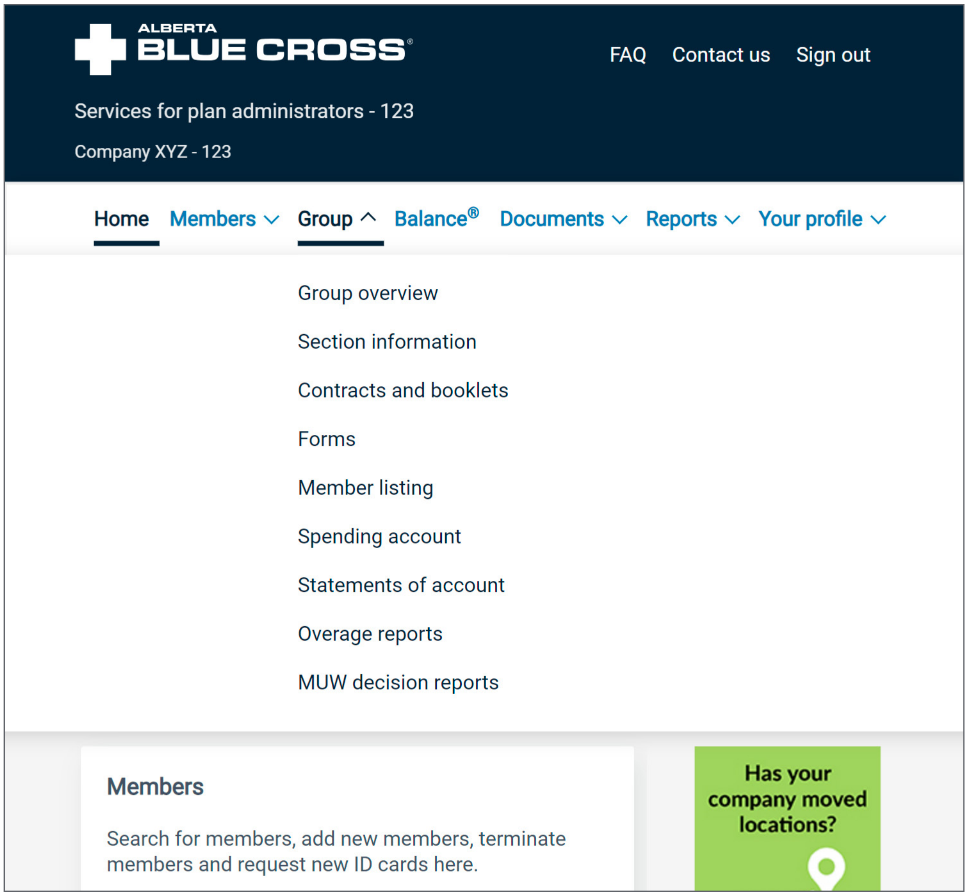
- ***View member***—Search for your plan member's file by entering information such as ID number, employee number or last name and birth date.
- ***Add member***—Use this function to add a new plan member to your group benefit plan.
- ***Request ID cards***—If one of your plan members needs new ID cards you can use this feature to order them online or to print them immediately. 2 identification cards will be issued for each request.




ALBERTA BLUE CROSS®
FAQ
Contact us
Sign out
Services for plan administrators - 123
Company XYZ - 123
Home
Members
Group
Balance®
Documents
Reports
Your profile
Members
We value your opinion
Contact us
Please call Alberta Blue Cross at 780-498-5925 (Edmonton) or 1-866-498-5925 (all other areas) Monday to Friday from 8:30 a.m. to 5:00 p.m. Mountain Standard Time.
Reports
Request report - Request reports that are available to you.
View report - View reports you have requested in the last 45 days.
Online updates - Use this menu item to view records for all updates submitted for your benefits plan through this web site during the
Members
View member - Search by identification number, employee number or surname and birthdate for your plan members' file information.
Add member - Use this function to add a new plan member to your group benefit plan.
ID cards - Use this link to easily generate and print employee ID cards.
Enrolment dashboard - a listing of the member self enrolments that are in progress.

Group—Most information in the ***Group*** area of the site is in Adobe Portable Document Format (PDF) or Excel spreadsheets. The ***Group*** content includes:

- ***Section information***—View and update the address we have on file for your company. The name of the plan administrator for this section and contact information for your sales and service representatives are also available here.
- ***Contracts and booklets***—Your group's contracts and benefit booklets are available in PDF format.
- ***Forms***—Print the forms used most frequently by plan administrators.
- ***Member listing***—Run a report listing plan members, their dependents and their benefits.
- ***Spending account*** *(if applicable)*—Information including your claiming limitation and carry-forward rules, policy year, reimbursement choice, termination rules, payments and/or statements, dependent claims and method of allocating credits.
- ***Statements of account***—This is available in both PDF and Excel format for the last 12 months. If applicable, the pre-authorized debit banking information we have on file for you is also available on this page as well as a printable ***Guide to Your Statement of Account***.
- ***Over-age reports***—These reports contain a listing of dependents approaching benefit age limits.



ALBERTA BLUE CROSS

FAQ Contact us Sign out

Services for plan administrators - 123

Company XYZ - 123

Home Members Group Balance® Documents Reports Your profile

Groups

Groups

Section information - The information we have on file for your group is available through this link for viewing and updating.

Contracts and booklets - Your group's contracts and booklets are posted in PDF format for you to view.

Forms - The forms used most frequently by plan administrators are for viewing and printing through this link.

Member listing - A listing of members and their dependents.

Spending account - Information, including your claiming limitation and carry forward rules, frequency of cheques and statements and termination rules.

Statements of account - Your statements of account, draft statement of account, billing guides and pre-authorized debit information for you to view.

Overage reports - A listing of dependents approaching benefit age limits.

MUW decision reports - A listing of MUW decision reports.

We value your opinion

Contact us

Please call Alberta Blue Cross at 780-498-5925 (Edmonton) or 1-866-498-5925 (all other areas) Monday to Friday from 8:30 a.m. to 5:00 p.m. Mountain Standard Time.

Reports

Request report - Request reports that are available to you.

View report - View reports you have requested in the last 45 days.

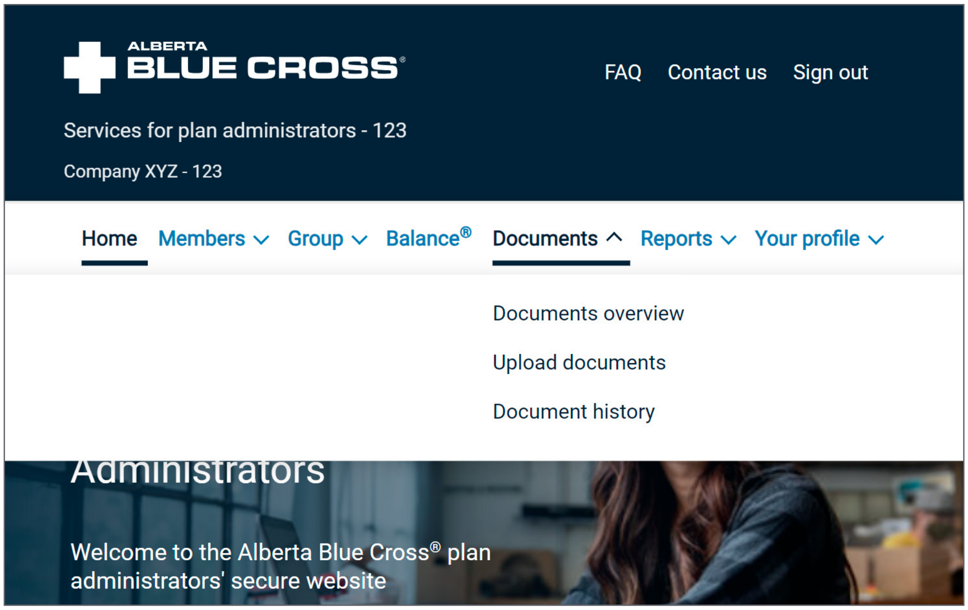
Online updates - Use this menu item to view records for all updates submitted for your benefits plan through this web site during the past 90 days.

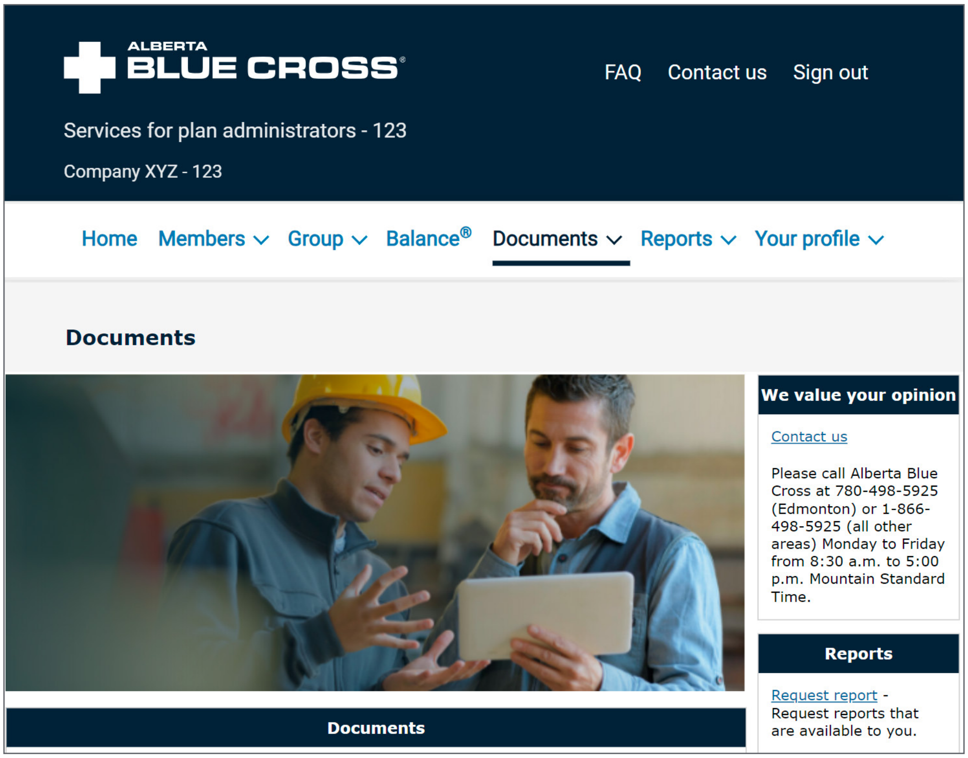
Documents

Upload documents - Use this functionality to send files and documents to Alberta Blue Cross.

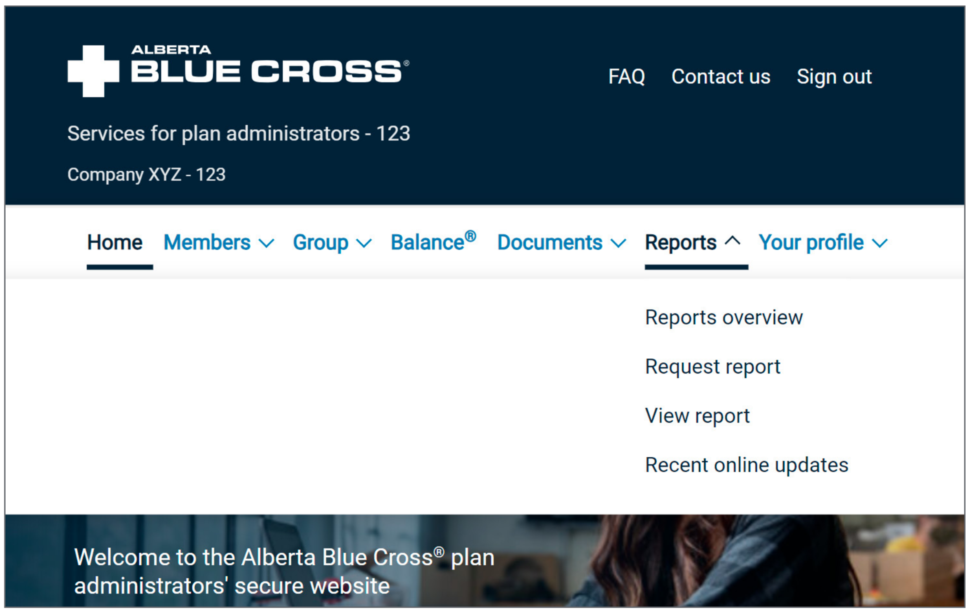
Document history -

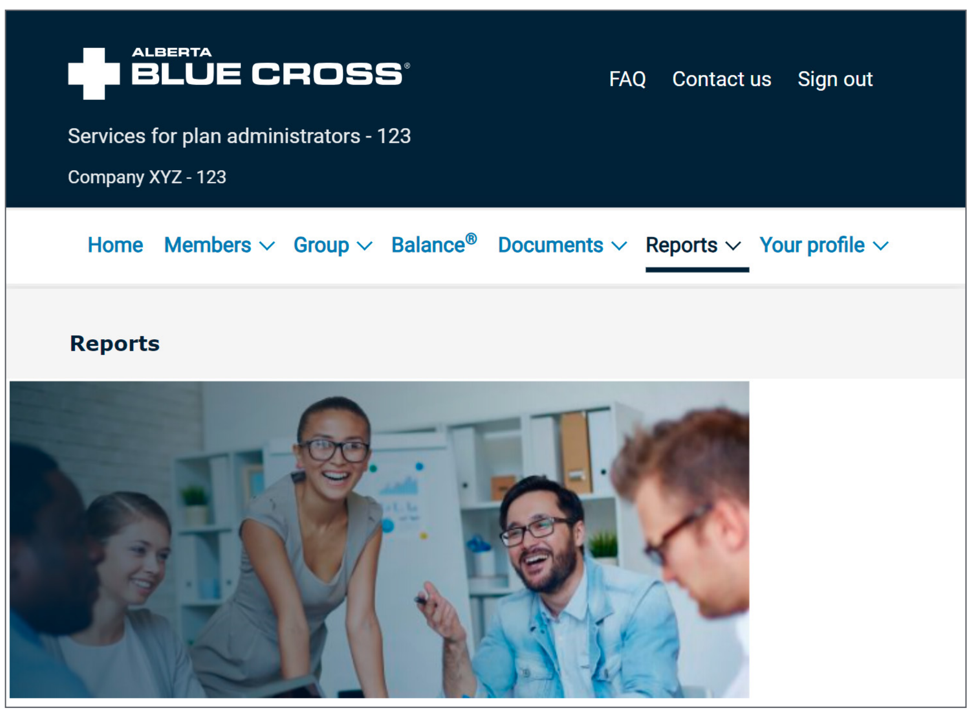
Documents—Click on *Documents* to view records for all updates submitted for your benefit plan through this website. You may search a date range or by confirmation, ID, employee number, last name, or a quick search of the past 90 days.





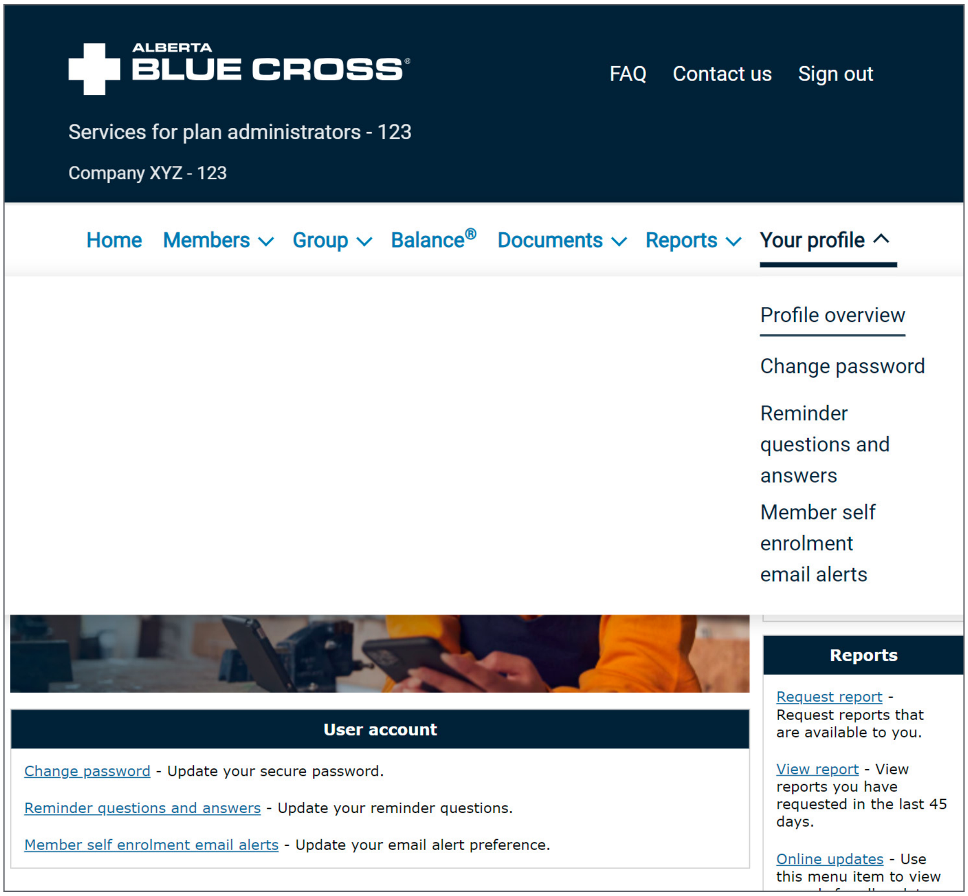
Reports—Click on *Reports* to view records for all updates submitted for your benefit plan through this website. You may search a date range or by confirmation, ID, employee number, last name, or a quick search of the past 90 days.



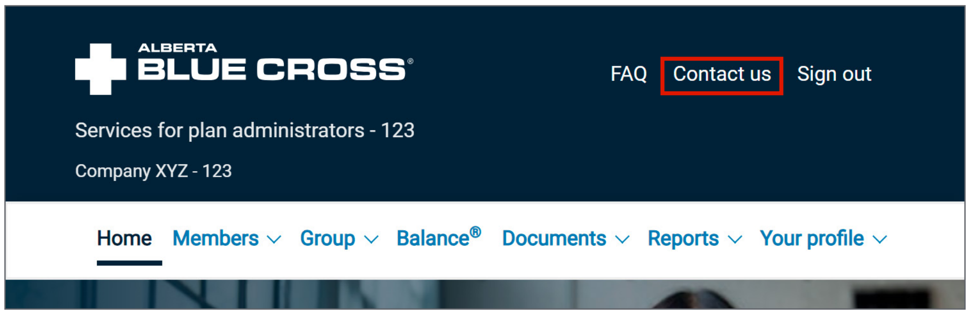


Your profile

- ***Change password***—Click on the *Change password* menu item to change your password at any time from within the website.
- ***Reminder questions and answers***—During website registration you are asked to provide security questions and answers. This information is used to identify you when you phone our offices or online if you should ever happen to forget your password.

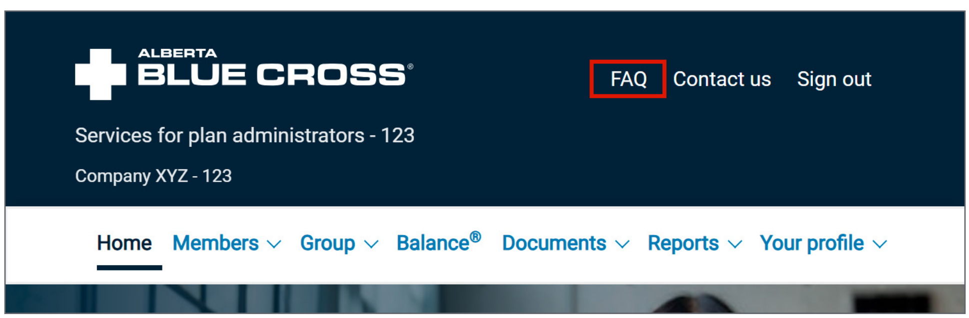


Contact us—Submit your questions here and we'll reply by email or phone as soon as possible. If your information is of a confidential or personal nature, please contact us directly via phone at 780-498-5925 (Edmonton and area) or toll-free in other areas of Canada and the U.S. at 1-866-498-5925. Our regular office hours are Monday to Friday from 8:30 a.m. to 5 p.m. Mountain Time.



FAQs

- Tips to help you use the website effectively. These are based on site users' questions and will be updated as needed.
- Answers to the most common questions group administrators ask about their Alberta Blue Cross plans:
  - Employee eligibility, waiting periods, changes in eligibility, terminations, making your payment, coordination of benefits and who can answer your questions.



Chapter 3: Members

Tip: To speed up the process of adding a plan member, make sure you have the member's email and mailing address, including their postal code.

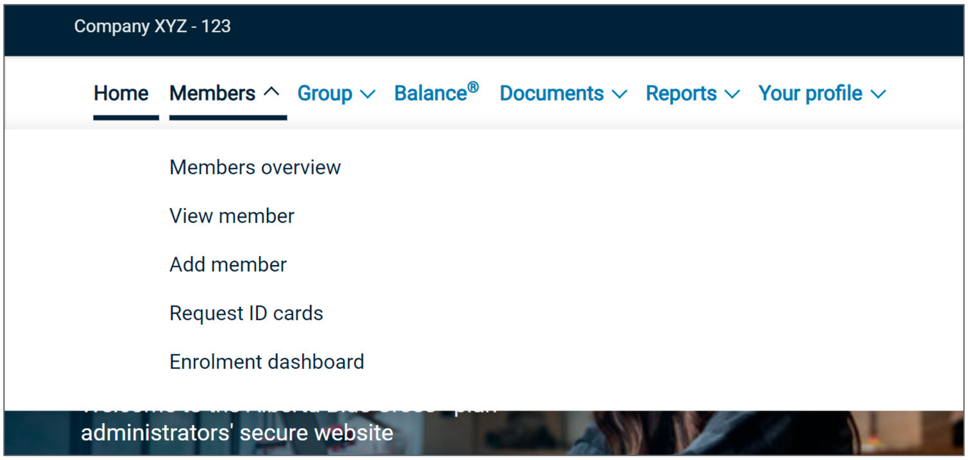
Adding a new plan member

This function allows you to add a new member and their eligible dependents to your benefit plan. 2 identification cards will be issued upon completion of processing by Alberta Blue Cross. (Note: to add a new dependent to an existing employee's file, see the ***Viewing and updating information for a plan member*** section.)

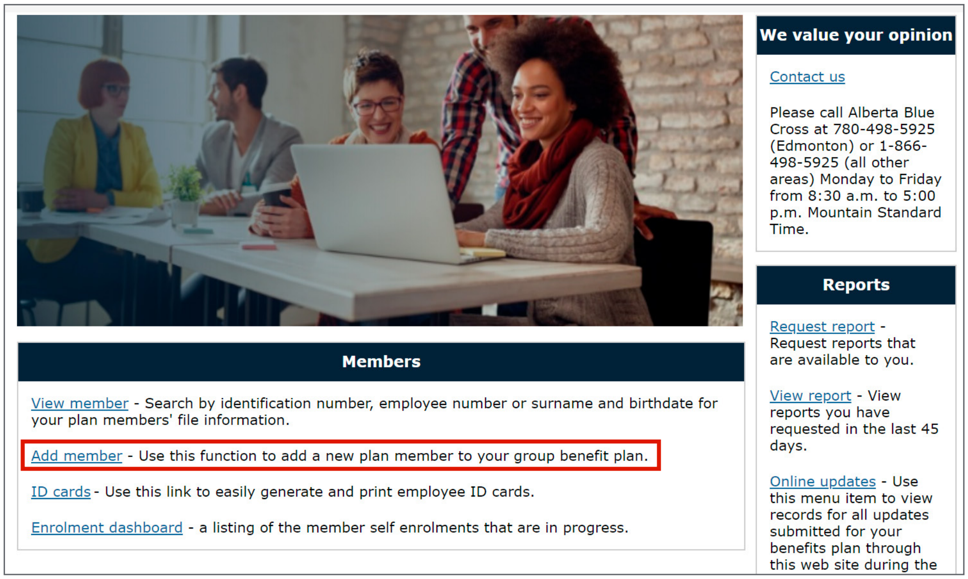
Although you will not be required to submit the paper application, it must be signed, dated and kept in your files to be produced if requested.

There are 2 ways to begin:

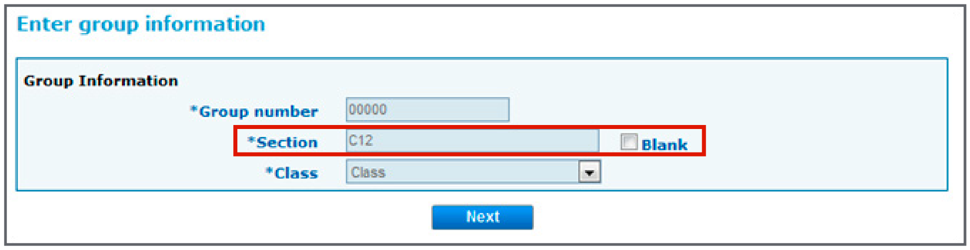
Click on ***Members*** in the top menu bar, then choose ***Add member*** from the sub-menu.



Or, navigate to the ***Members*** page of the website and choose ***Add member*** from the descriptions in the ***Members*** block.



The group number will be filled in for you so you only need to enter the section you'd like the member to be enrolled in. Class information will be provided automatically based on the section indicated.


Enter group information

Group Information

*Group number 00000

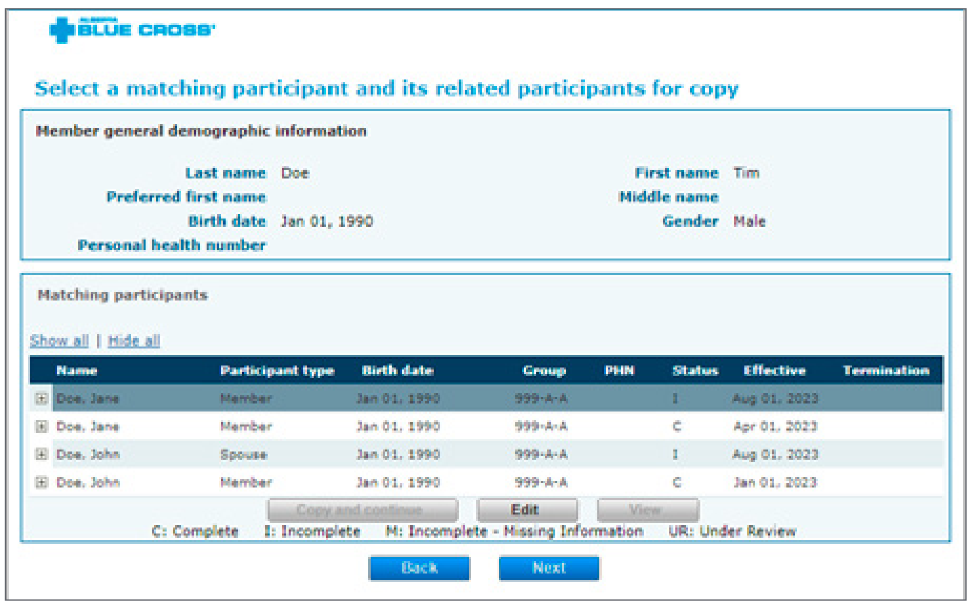
*Section C12 Blank

*Class Class

Next

View potential matches

When you click *Next* on the *Create member general information* screen, the website may display possible matches to the information you've entered to help avoid the creation of duplicate records. If there are no possible matches, you will proceed to the *Create* screen.


BLUE CROSS

Select a matching participant and its related participants for copy

Member general demographic information

Last name Doe

First name Tim

Preferred first name

Middle name

Birth date Jan 01, 1990

Gender Male

Personal health number

Matching participants

Show all | Hide all

Name	Participant type	Birth date	Group	PHN	Status	Effective	Termination
Doe, Jane	Member	Jan 01, 1990	999-A-A		I	Aug 01, 2023	
Doe, Jane	Member	Jan 01, 1990	999-A-A		C	Apr 01, 2023	
Doe, John	Spouse	Jan 01, 1990	999-A-A		I	Aug 01, 2023	
Doe, John	Member	Jan 01, 1990	999-A-A		C	Jan 01, 2023	

Copy and continue Edit View

C: Complete I: Incomplete M: Incomplete - Missing Information UR: Under Review

Back Next

Show—expands the table to show dependents associated with this plan member.

Copy and continue—base a new plan member's information on the information available for an existing file.

Edit—modifies an existing file.

View—allows you to take a closer look at the file to determine if it is an exact match or just a similar file.

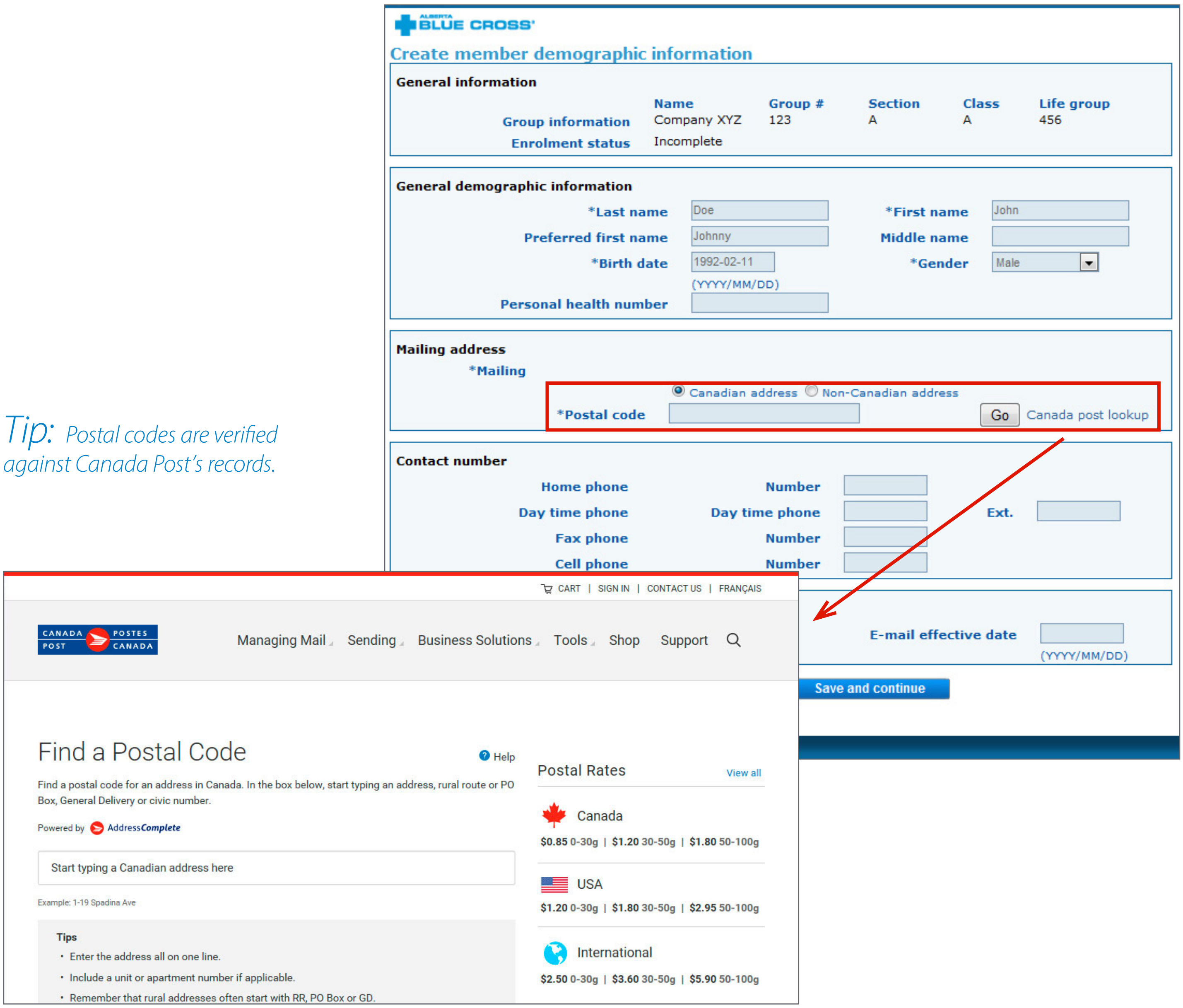
Next—continue and create a new file.

Add a mailing address, phone numbers and an email address

Enter the member's postal code and click *Go*.

If you don't know the postal code, click on *Canada post lookup*. Once you have the postal code, enter it in the field provided and click *Go*.

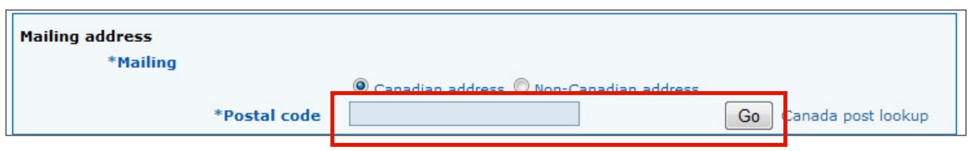
Tip: *Postal codes are verified against Canada Post's records.*



Tip: Once you look up a postal code, please copy and paste it into the postal code field.

Based on the postal code, the street, city, province and country will be populated. All you need to do is enter the number (for example, 10212).

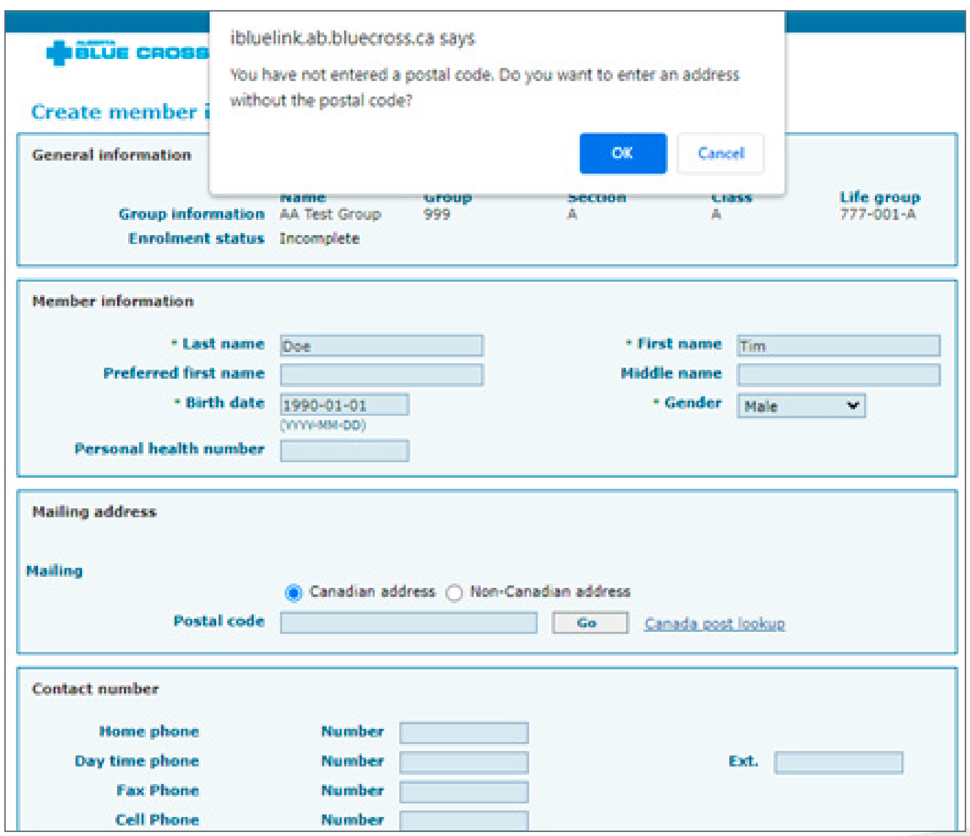
If you cannot enter the postal code, you may leave the field blank and click ***Go***.



Tip: What if there isn't a valid Canadian postal code for the plan member? (This could happen if the plan member is living in a new district.)

If the address cannot be verified after entering the postal code and address, use the "Other" radio button to enter it manually.

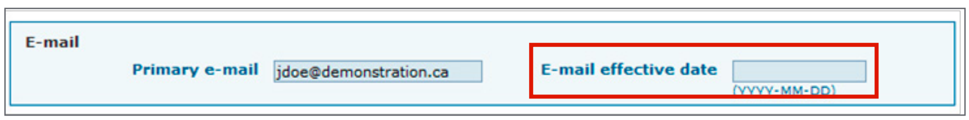
You will see an information message like the one below. Click ***OK*** to continue.



*Click **OK** and enter the address without the postal code.*

Click on ***Non-Canadian*** address to enter addresses for plan members outside Canada.

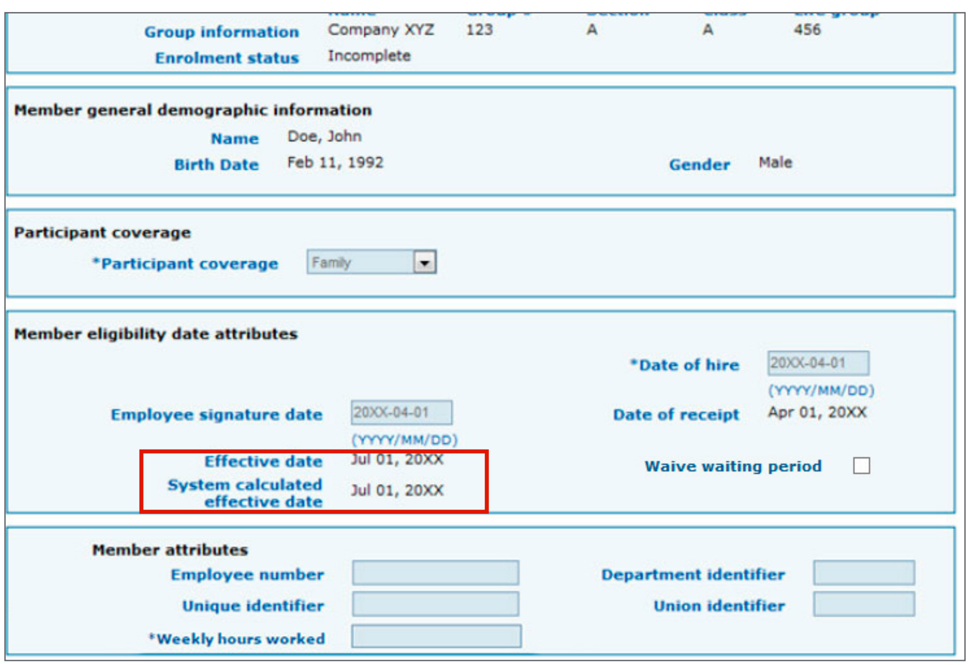
Tip: If you leave the effective date blank on any screen, the website will display it as 1800-01-01 or Jan 01, 1800.



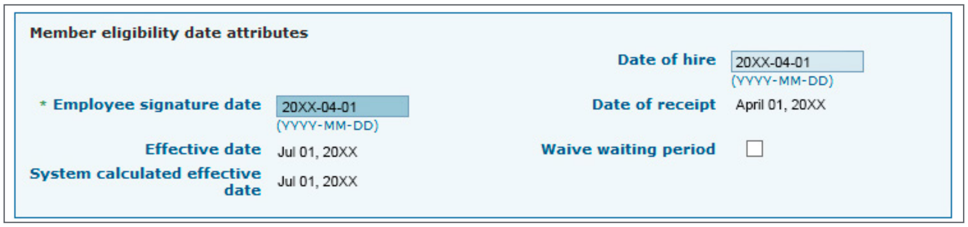
Single/family, date hired and employee information

- Enter the requested information about the type of coverage (for example, single or family), date of hire and signature date.
- Effective dates will be calculated for you based on your plan's rules.
- Date of receipt will always be today's date.

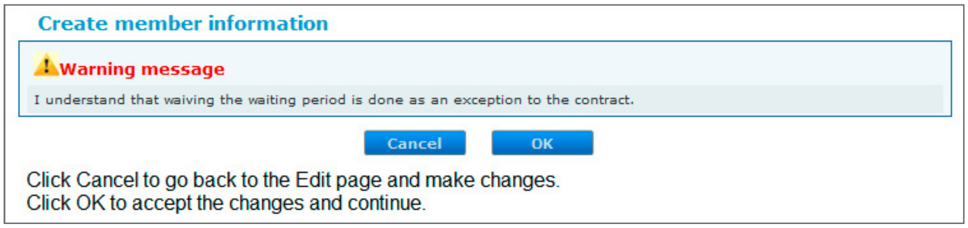
*Tip: **If your group administers its own waiting periods**, there will not be an automatically-calculated effective date and instead there will be a field where you can enter the appropriate effective date.*



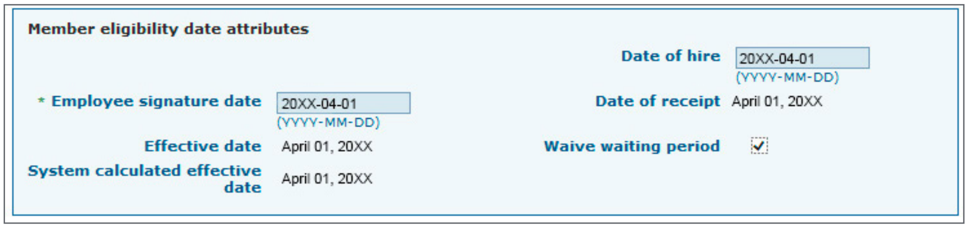
Once the employee signature date and date of hire are entered, and if the member qualifies, the “Waive waiting period” check box will appear.



If you check the box, a warning message will appear.

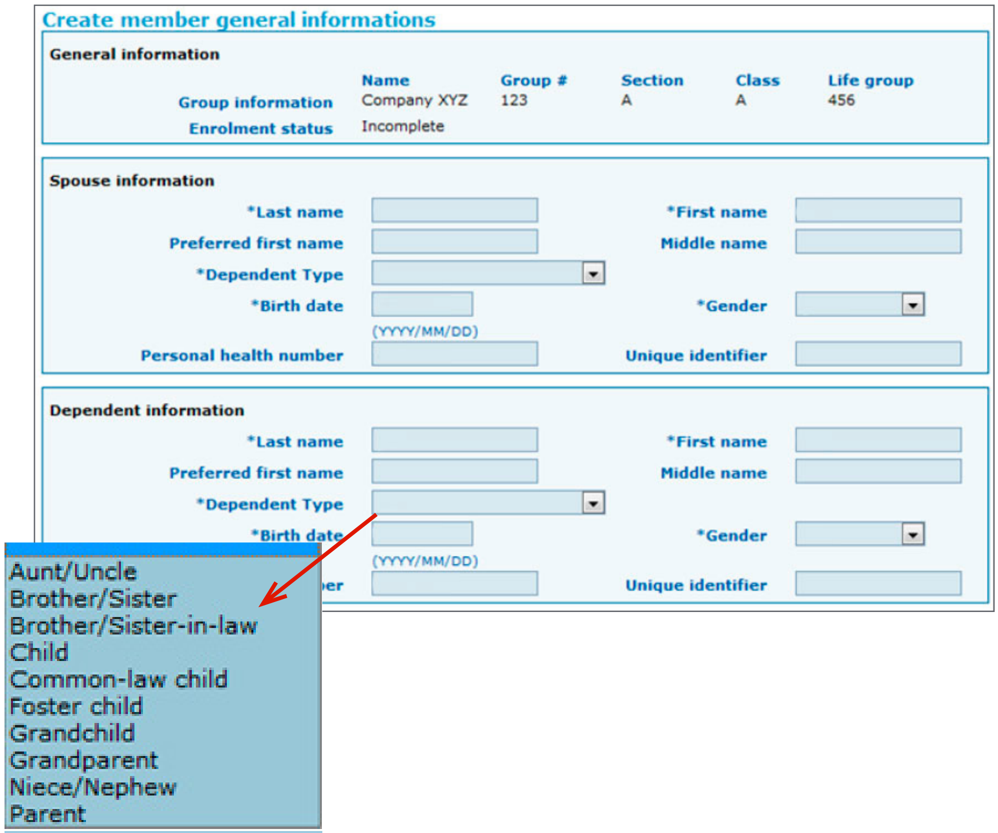


Once you click *OK*, the dates will change accordingly.



Tip: Depending on the type of dependent you're adding, additional information may be required

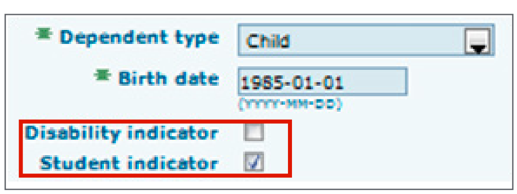
Add dependents, if applicable



Tip: Contact us for additional information on processing over-age dependents

Over-age dependents

If you add a dependent who is 21 or older, you will need to check either the Disability or Student indicator. If an over-age student finishes school before reaching the age of 25, you must enter a termination date. **Unchecking the Student indicator will not terminate their coverage.**



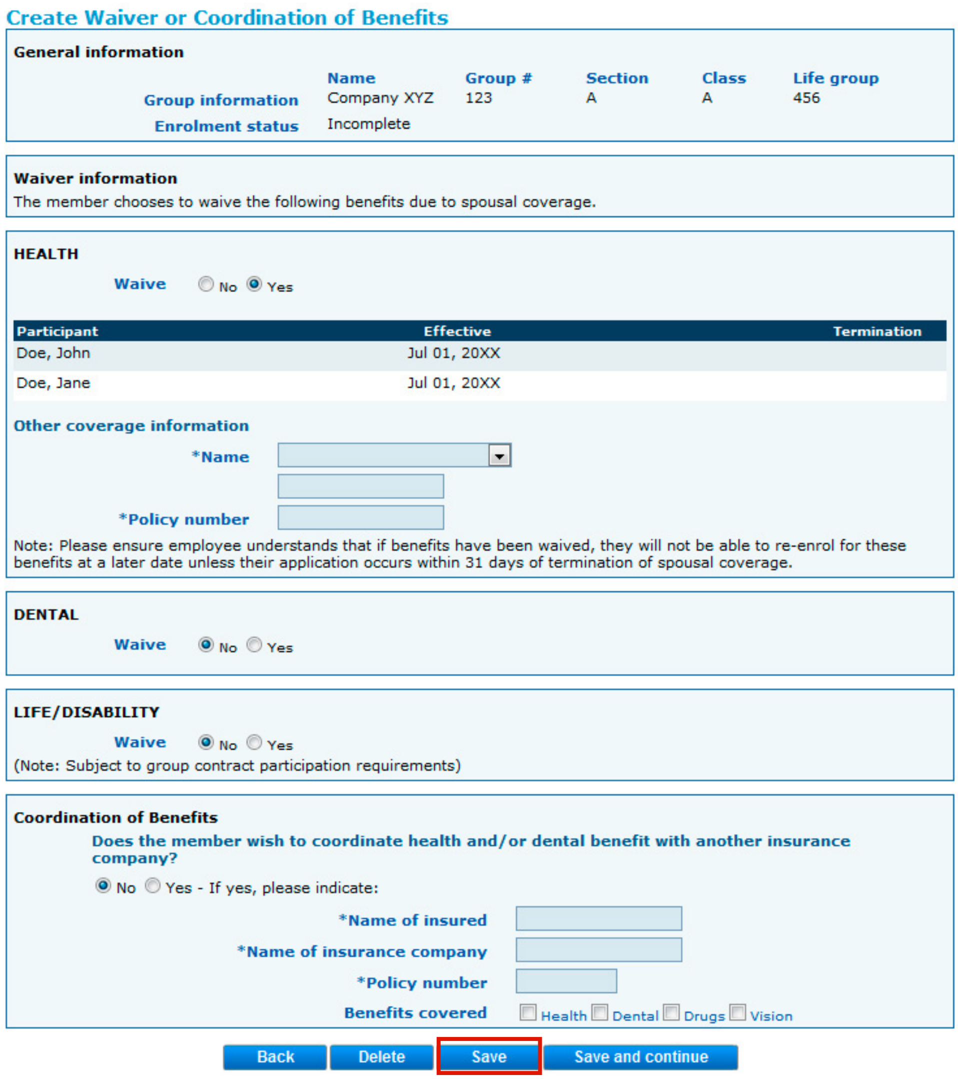
Waiving coverage and coordination of benefits

Indicate which benefits the plan member wishes to waive (if any) due to spousal coverage and add coordination of benefits details, if applicable.

Tip: If a dependent coordinates benefits, but the member doesn't, please contact Group Administration and we will enter the coordination information.

Tip: To add coordination of benefits or a waiver after initial enrolment, contact group administration.

*Tip: Choose the **Save** button instead of **Save and continue** if you would like to partially complete the enrolment and come back later to finish it.*



Create Waiver or Coordination of Benefits

General information

	Name	Group #	Section	Class	Life group
Group information	Company XYZ	123	A	A	456
Enrolment status	Incomplete				

Waiver information

The member chooses to waive the following benefits due to spousal coverage.

HEALTH

Waive ○ No ◉ Yes

Participant	Effective	Termination
Doe, John	Jul 01, 20XX	
Doe, Jane	Jul 01, 20XX	

Other coverage information

*Name

*Policy number

Note: Please ensure employee understands that if benefits have been waived, they will not be able to re-enrol for these benefits at a later date unless their application occurs within 31 days of termination of spousal coverage.

DENTAL

Waive ◉ No ○ Yes

LIFE/DISABILITY

Waive ◉ No ○ Yes

(Note: Subject to group contract participation requirements)

Coordination of Benefits

Does the member wish to coordinate health and/or dental benefit with another insurance company?

◉ No ○ Yes - If yes, please indicate:

*Name of insured

*Name of insurance company

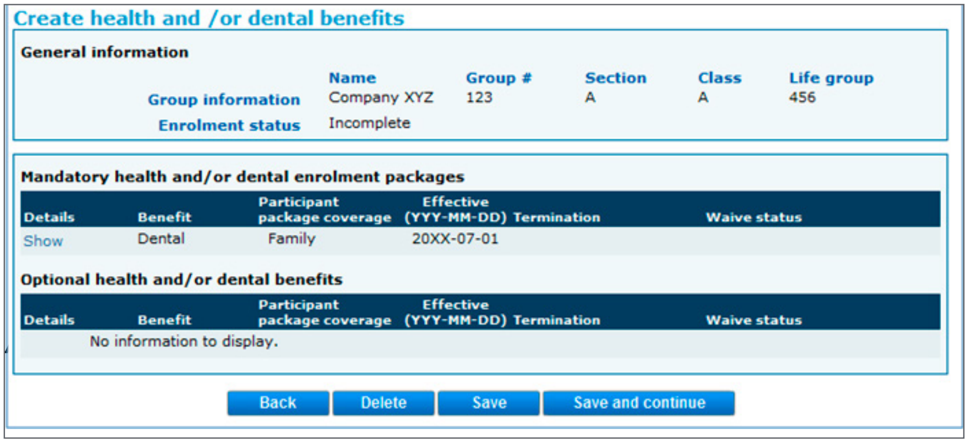
*Policy number

Benefits covered ☐ Health ☐ Dental ☐ Drugs ☐ Vision

Back | Delete | Save | Save and continue

Tip: Salary is only required if it is needed to calculate the volume of coverage for your employee. For example if your basic life benefit is based on 2 times the annual salary, we would need to know the salary in order to calculate the appropriate coverage.

Create health and/or dental benefits



Create health and /or dental benefits

General information

	Name	Group #	Section	Class	Life group
Group information	Company XYZ	123	A	A	456
Enrolment status	Incomplete				

Mandatory health and/or dental enrolment packages

Details	Benefit	Participant package coverage	Effective (YYY-MM-DD)	Termination	Waive status
Show	Dental	Family	20XX-07-01		

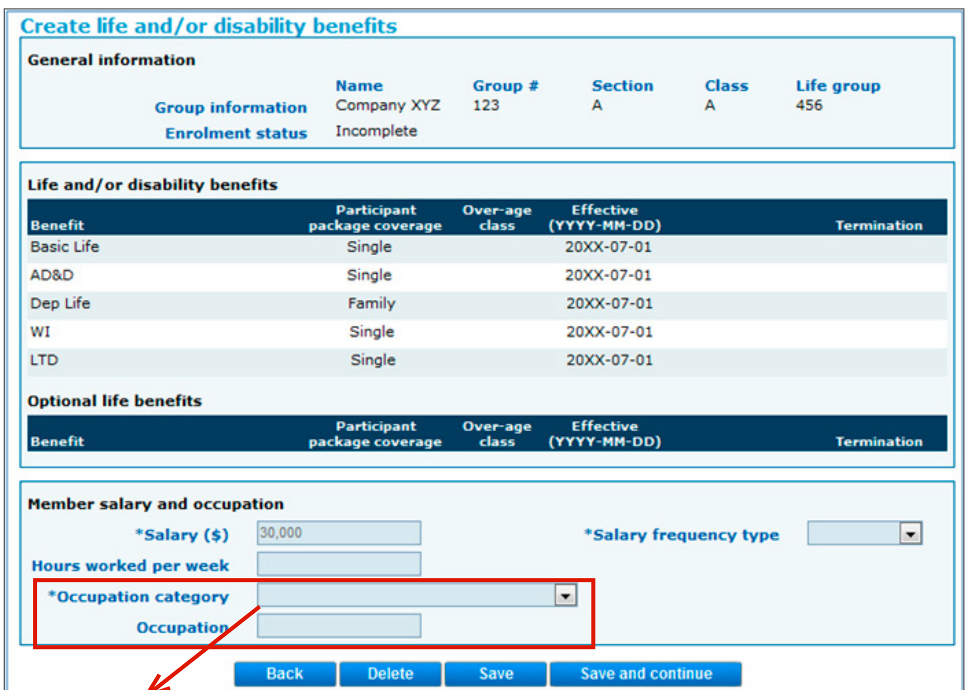
Optional health and/or dental benefits

Details	Benefit	Participant package coverage	Effective (YYY-MM-DD)	Termination	Waive status
	No information to display.				

Back | Delete | Save | Save and continue

Tip: Choose the occupation category from the drop-down list that most closely matches the occupation of the member then enter the exact occupation in the field below.

Add life and/or disability benefit information (if applicable)



Create life and/or disability benefits

General information

	Name	Group #	Section	Class	Life group
Group information	Company XYZ	123	A	A	456
Enrolment status	Incomplete				

Life and/or disability benefits

Benefit	Participant package coverage	Over-age class	Effective (YYYY-MM-DD)	Termination
Basic Life	Single		20XX-07-01	
AD&D	Single		20XX-07-01	
Dep Life	Family		20XX-07-01	
WI	Single		20XX-07-01	
LTD	Single		20XX-07-01	

Optional life benefits

Benefit	Participant package coverage	Over-age class	Effective (YYYY-MM-DD)	Termination

Member salary and occupation

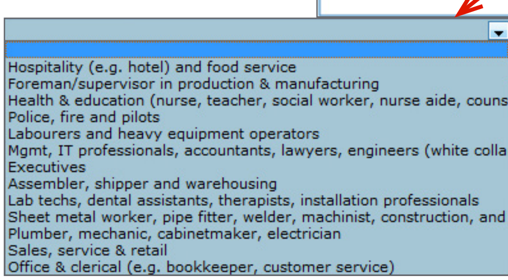
*Salary ($) 30,000 — *Salary frequency type

Hours worked per week

*Occupation category

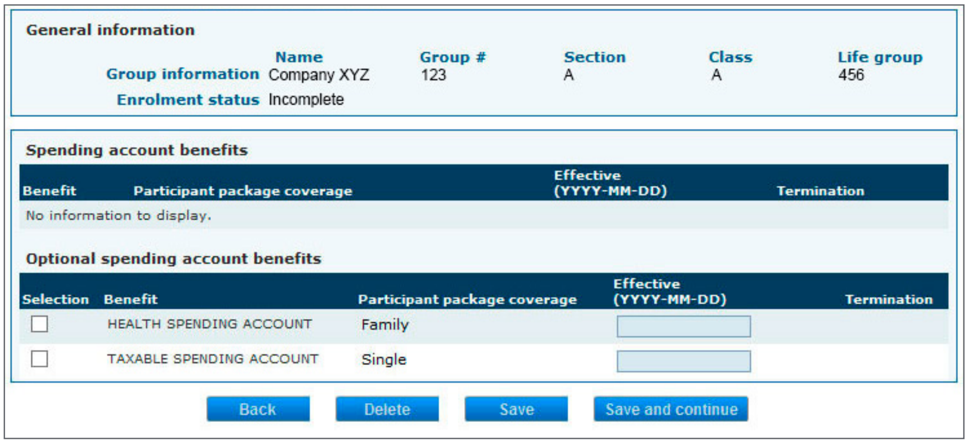
Occupation

Back | Delete | Save | Save and continue



Hospitality (e.g. hotel) and food service
Foreman/supervisor in production & manufacturing
Health & education (nurse, teacher, social worker, nurse aide, couns
Police, fire and pilots
Labourers and heavy equipment operators
Mgmt, IT professionals, accountants, lawyers, engineers (white colla
Executives
Assembler, shipper and warehousing
Lab techs, dental assistants, therapists, installation professionals
Sheet metal worker, pipe fitter, welder, machinist, construction, and
Plumber, mechanic, cabinetmaker, electrician
Sales, service & retail
Office & clerical (e.g. bookkeeper, customer service)

Create spending account benefits



General information

	Name	Group #	Section	Class	Life group
Group information	Company XYZ	123	A	A	456
Enrolment status	Incomplete				

Spending account benefits

Benefit	Participant package coverage	Effective (YYYY-MM-DD)	Termination
No information to display.			

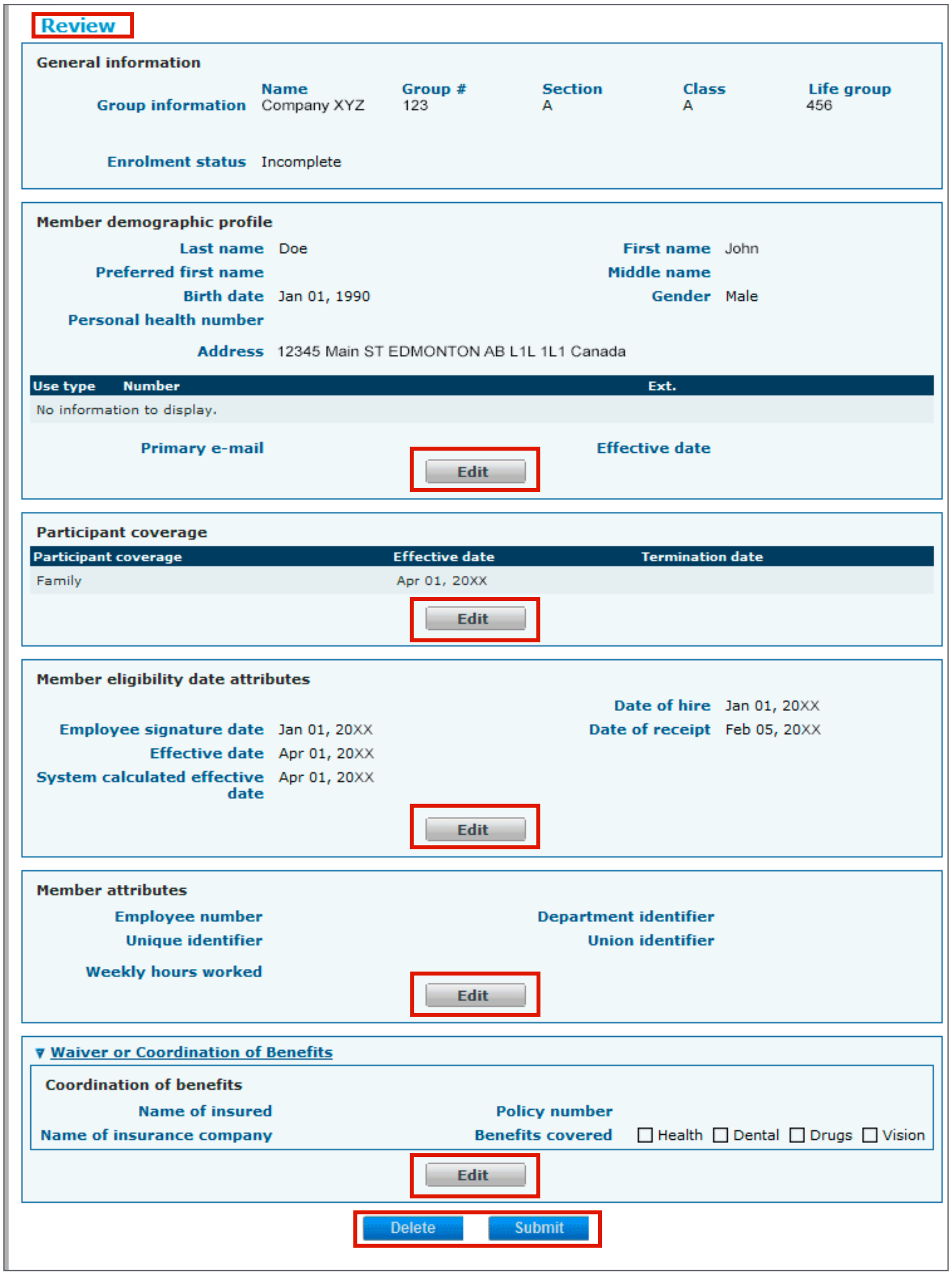
Optional spending account benefits

Selection	Benefit	Participant package coverage	Effective (YYYY-MM-DD)	Termination
☐	HEALTH SPENDING ACCOUNT	Family		
☐	TAXABLE SPENDING ACCOUNT	Single		

Back | Delete | Save | Save and continue

Review the information you are about to submit

- If any changes are needed, click on an ***Edit*** button to make changes before you submit the enrolment.



Review

General information

	Name	Group #	Section	Class	Life group
Group information	Company XYZ	123	A	A	456

Enrolment status Incomplete

Member demographic profile

Last name Doe
First name John
Preferred first name
Middle name
Birth date Jan 01, 1990
Gender Male
Personal health number
Address 12345 Main ST EDMONTON AB L1L 1L1 Canada

Use type	Number	Ext.
No information to display.		

Primary e-mail
Effective date

Edit

Participant coverage

Participant coverage	Effective date	Termination date
Family	Apr 01, 20XX	

Edit

Member eligibility date attributes

Date of hire Jan 01, 20XX
Employee signature date Jan 01, 20XX
Date of receipt Feb 05, 20XX
Effective date Apr 01, 20XX
System calculated effective date Apr 01, 20XX

Edit

Member attributes

Employee number
Department identifier
Unique identifier
Union identifier
Weekly hours worked

Edit

▼ Waiver or Coordination of Benefits

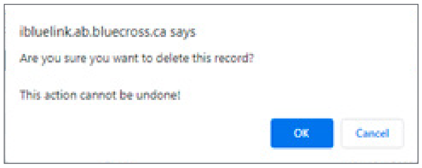
Coordination of benefits

Name of insured
Policy number
Name of insurance company
Benefits covered ☐ Health ☐ Dental ☐ Drugs ☐ Vision

Edit

Delete Submit

*Tip: Be very careful about clicking the **Delete** button. A warning message will appear, but if you disregard this, you will lose all the information you enter for this plan member.*



ibluelink.ab.bluecross.ca says

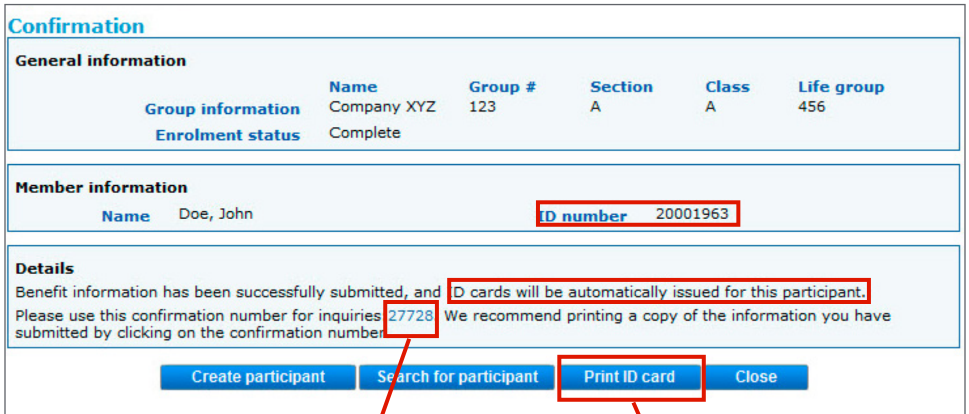
Are you sure you want to delete this record?

This action cannot be undone!

OK Cancel

Confirmation and ID card

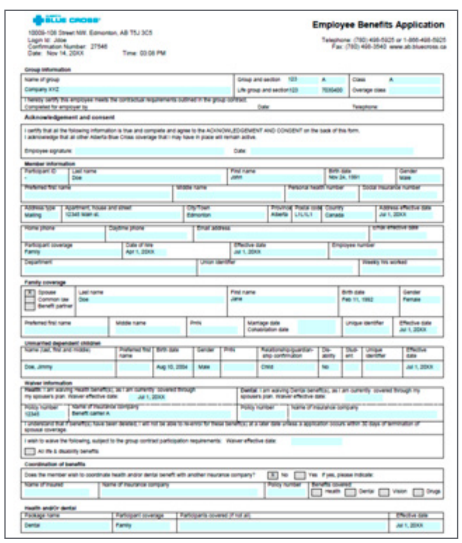
- In most cases you will receive an ID number for the plan member and be able to print an ID card for them immediately. You will also be able to view and save a PDF containing details for your records.



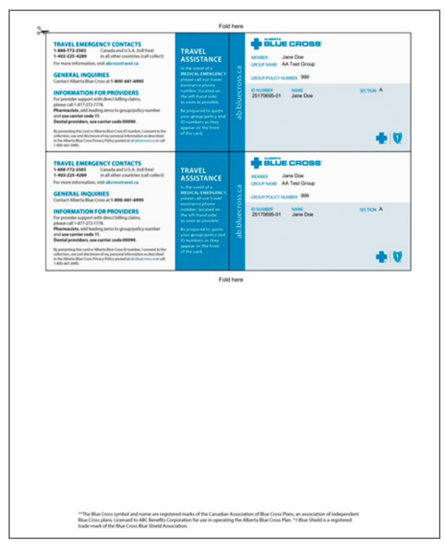
Click on the confirmation number to print a copy of the transaction for your records

Tip: You may print ID cards for the plan member, but it is not necessary; Alberta Blue Cross will mail the cards.

Employee Benefits Application



Printable ID Cards

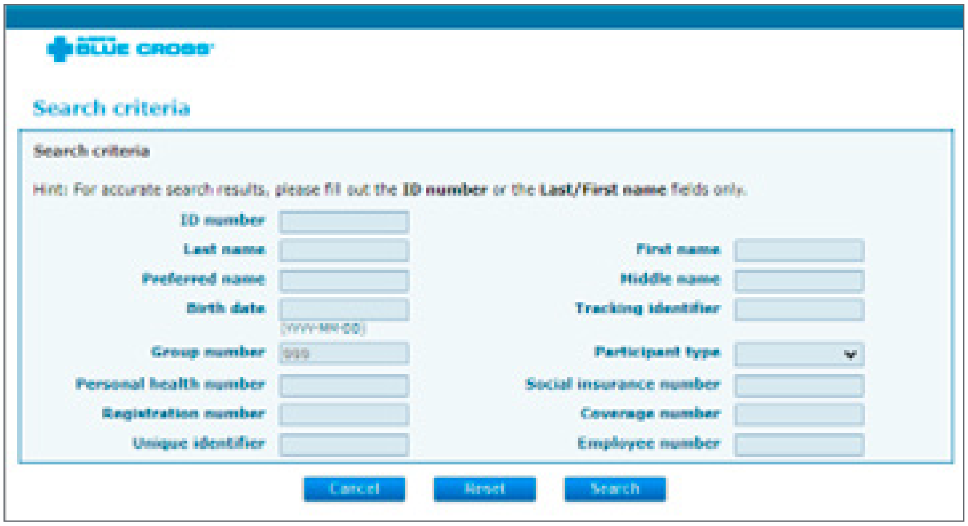


Tip: Unsure of the spelling? For last names, you may use an asterisk [*] after 3 characters to replace the last part of the name. For example, if you are searching for MACDONALD you may enter MAC to find all entries beginning with MAC. These could include, for example, MACDERMID and MACDIARMID.*

Viewing and updating information for an existing member

The processes for updating, transferring and terminating plan members are very similar. For all of those processes, you begin with step 1, searching for the member's file.

Use a benefit change form (ABC 20058 for Life and/or Disability Benefits groups or ABC 20065 for Health and Dental groups) as a guide for gathering the information you will need to submit through the site. Forms are available under ***Group*** > ***Forms*** on the top menu on all webpages.


BLUE CROSS

Search criteria

Search criteria

Hint: For accurate search results, please fill out the **ID number** or the **Last/First name** fields only.

ID number			
Last name		**First name**	
Preferred name		**Middle name**	
Birth date	(YYYY-MM-DD)	**Tracking identifier**	
Group number		**Participant type**	
Personal health number		**Social insurance number**	
Registration number		**Coverage number**	
Unique identifier		**Employee number**	

Cancel Reset Search

Updating information such as addresses, benefits or dependent information

Step 1:

- Click on the ***Member*** link at the top of the page, and then click on ***View member***.
- Enter information you know about the member in the fields provided. Specific information, such as an ID number will take you directly to the member's file. If you enter general information, such as a last name only, you may be presented with several search results to choose from.
- Alberta Blue Cross ID number: this must be the plan member's Alberta Blue Cross ID number. You may include the dash and the 2 numbers after the dash, for example, 1234567-89, if available.
- Employee number: this number would be issued by your organization and may be used as the Alberta Blue Cross ID number (the number printed on the Alberta Blue Cross ID cards) as well.
- Birth date: this field can help narrow your search for an individual member's record, but may only be used if you have also entered a last name. The format for dates throughout the website is YYYY-MM-DD.

After clicking the *Search* button, you will either go straight to the member's record or see records for 1 or more plan member information if there are potential matches.

Step 2:

Once you find the file you need, you will be taken to the *View participant enrolment* screen. Buttons at the bottom of the page allow you to terminate or transfer the plan member or reinstate a terminated plan member. Quick links provide opportunities to edit the member's address, phone or change their benefit status from family or single coverage.

Step 3:

To edit member information, you may either:

- Use the quick links in the *General information* section of the *View participant enrolment* screen, or
- Select the *Member* tab and click the grey edit member button near the bottom of the page.

Follow the instructions to make changes to member information such as name, birth date, participant coverage (for example single or family), address and contact information.

Step 4:

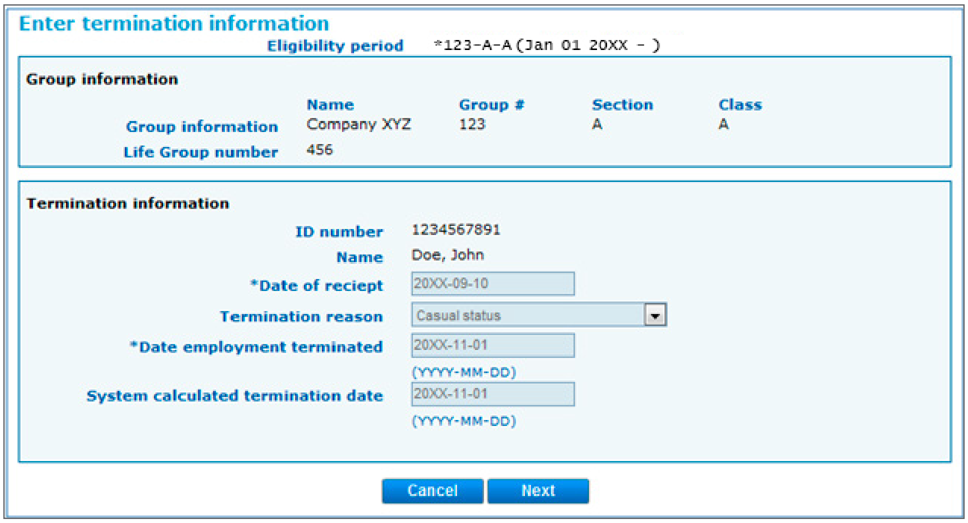
Review the changes you've made and if necessary, make revisions. Click on the ***Submit*** button to confirm your changes.

Step 5:

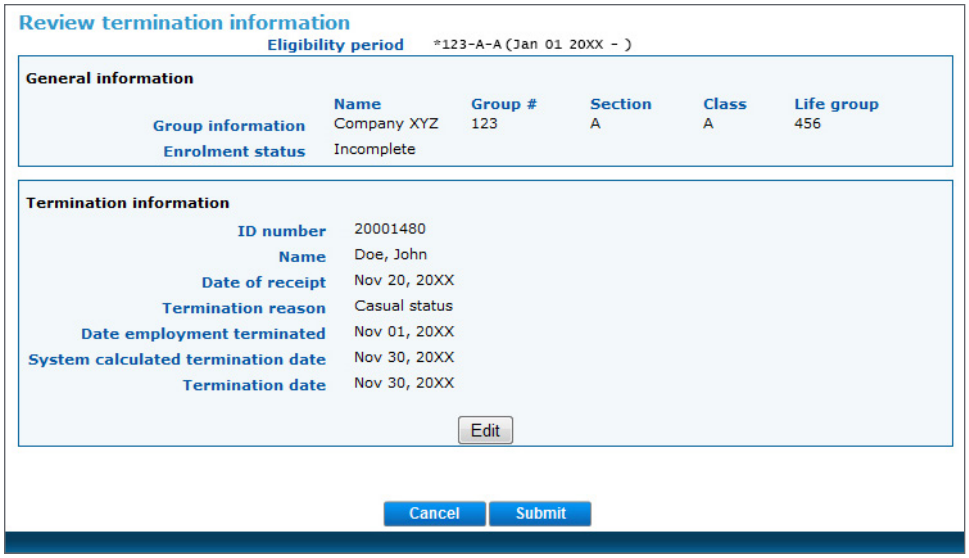
Record the update's confirmation number for your files. Click the confirmation number to save the PDF for your files, with the option to print.

Terminating a plan member

- Click on *Member* > *View* member then search for the plan member you need to terminate.
- Click the *Terminate member* button at the bottom of the member's file.
- Enter the requested information and click *Next*.
- **Date of receipt**—field will be auto-populated with today's date in a non editable format.
- **Termination reasons should be chosen from the drop-down list which includes the following:** casual status, laid off, leave of absence, left employment, lock out, maternity leave, member deceased, parental leave, other coverage, over age, part time employment, retired, sabbatical and strike.
- **Date employment terminated**—enter the date the employee will cease, or has ceased, working for your organization.
- **System calculated termination date**—in most cases, this will be calculated for you based on the termination date you enter.



After you click the ***Next*** button, you will see a review screen which allows you to make sure you've entered the termination correctly. Edit the information, if necessary, then click ***Submit***.

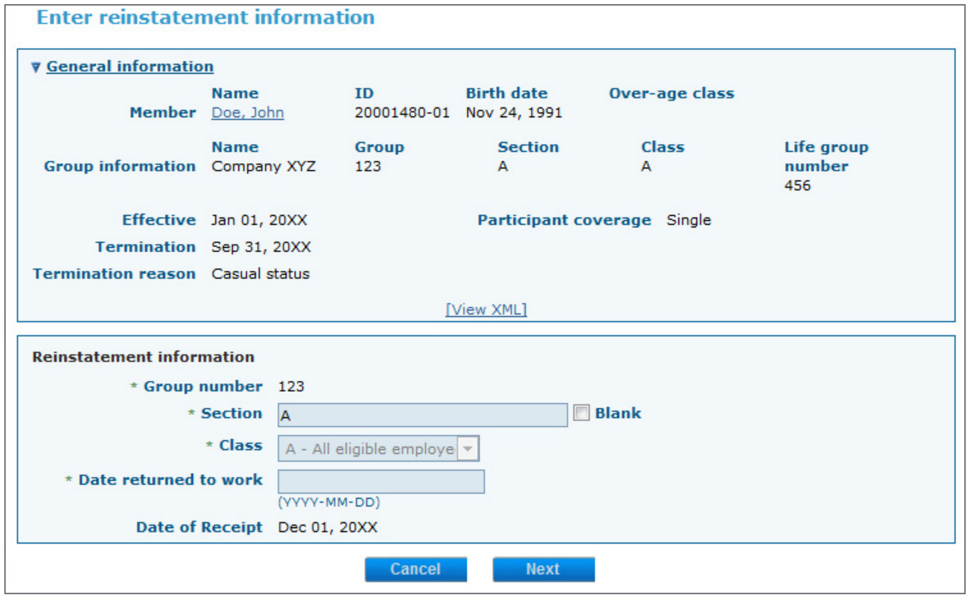


You will see a confirmation page telling you that the information has been successfully submitted. Click on the confirmation number to print a copy of the termination for your records.

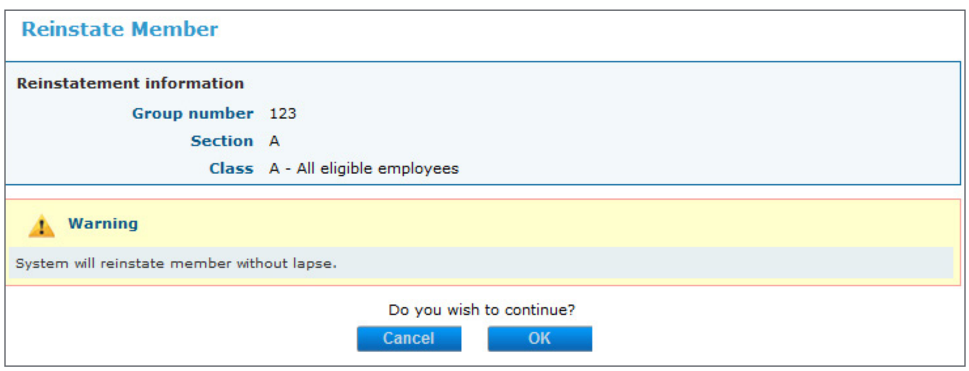
Tip: When an employee is reinstated, we will send ID cards automatically, so there is no need to order them.

Reinstating a terminated plan member

Use *Member* > *View* member to find the member's file. The *Overview* tab will contain information about the termination and at the bottom of the page, you will find buttons for reinstating the member.

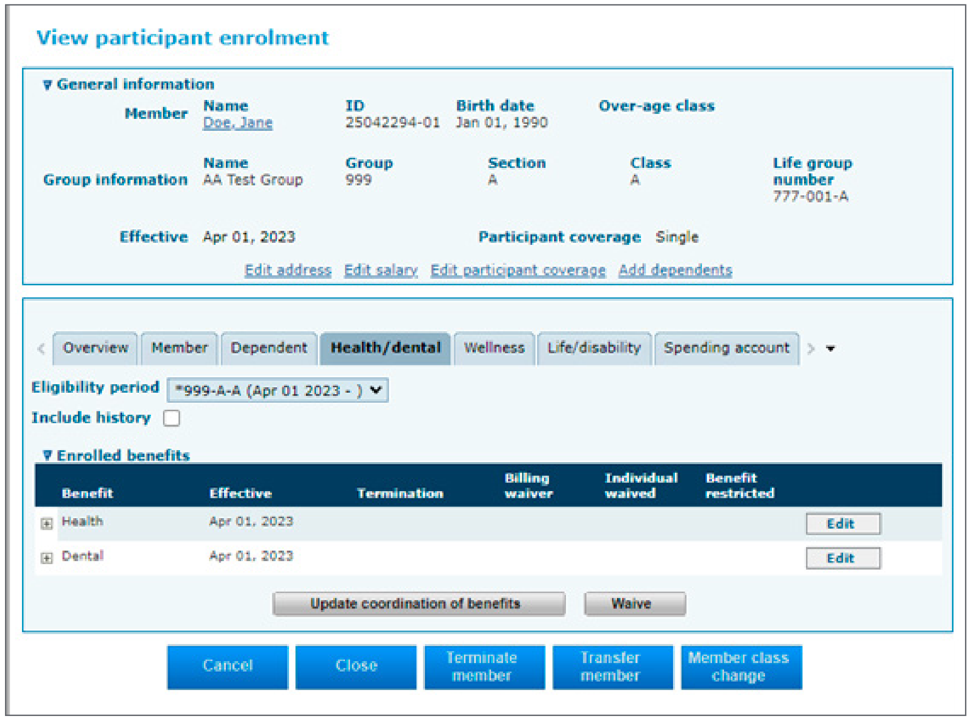


Reinstating a plan member without a lapse will result in a warning message being displayed. If you click *OK*, the member will be reinstated without a gap in their benefits.



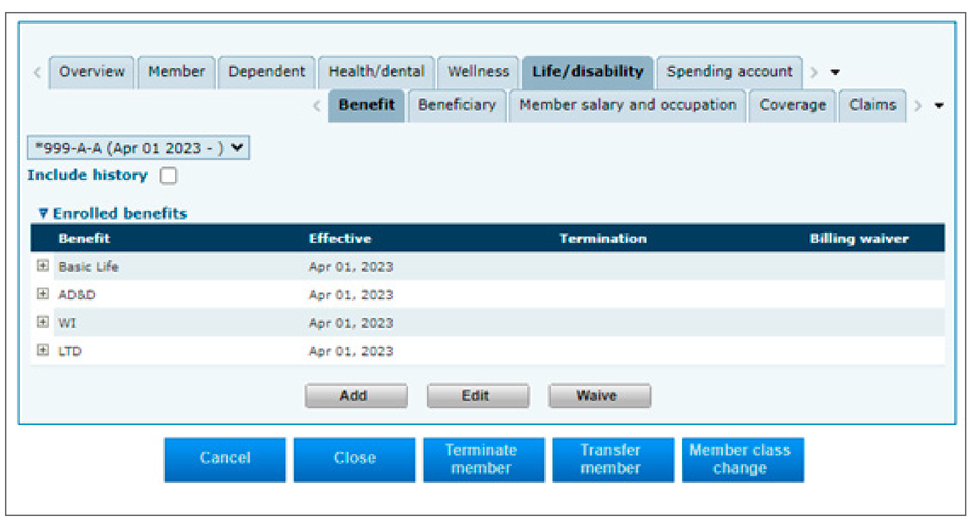
Tip: Contact us for additional information on processing over-age dependents.

Health/dental tab



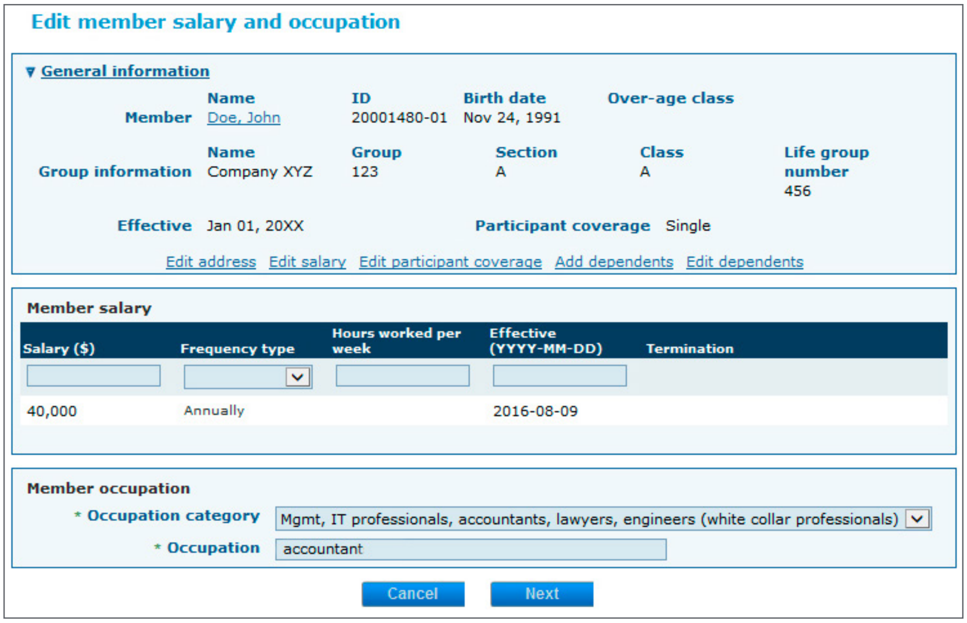
Life/disability tab

- Benefit
- Beneficiary
- Member salary and occupation
- Coverage



Edit salary

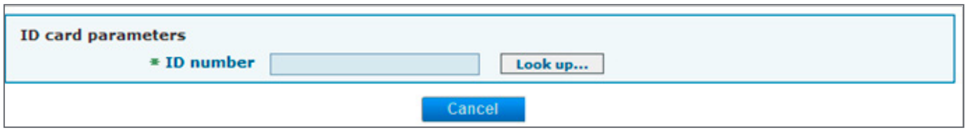
When a plan member has a change in salary, it is updated by going to the member salary and occupation tab. Click ***Edit***, then ***Add,*** enter the new salary amount, frequency and hours worked per week. Member occupation can be updated if applicable. Click ***Next*** and review the changes made. Click ***Submit*** to complete the edit.



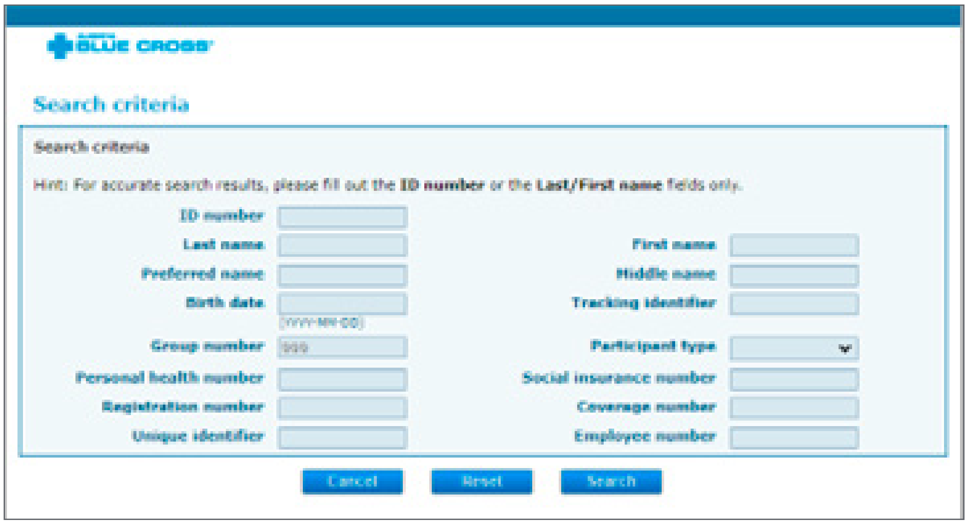
Request ID cards

You can request ID cards after adding or updating a member's information or without making changes to the file.

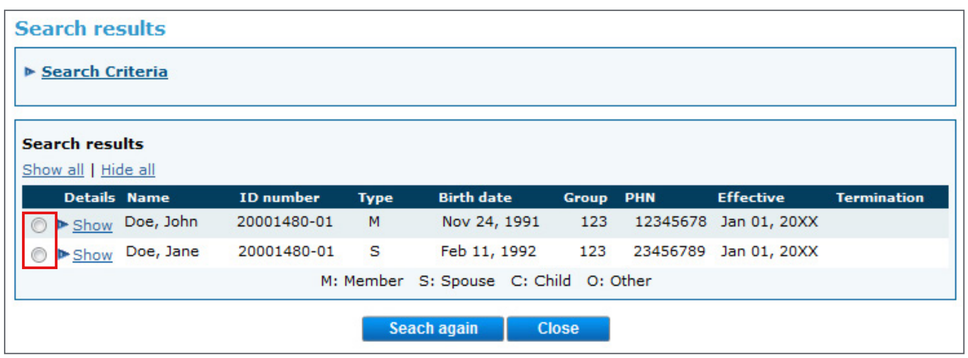
On the *Home* page click on *Request ID cards* or at the top of the page, click on *Member > Request ID cards*. Enter the individual's ID number and then click *Look* up to find the individual.



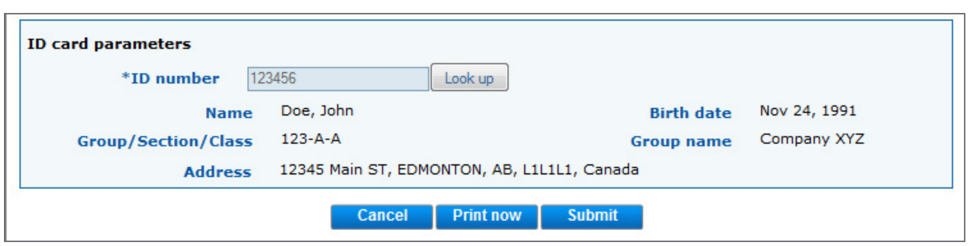
If you don't know the member's ID number, leave the ID number field blank and click on the ***Look up*** button. Then use the search feature to find the individual.



Depending on how general your search was, you may receive several search results. Click the round (radio) button to the left of the individual you want, and then click ***OK***.



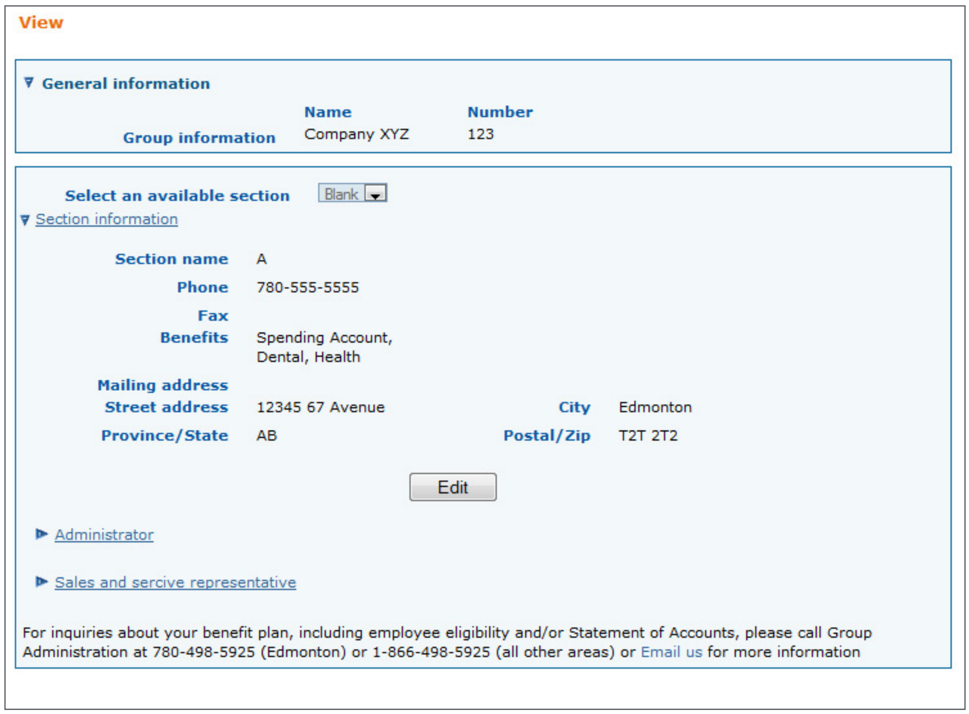
Choose ***Print now*** to see a PDF ID card that you may print immediately, or choose ***Submit*** to have Alberta Blue Cross mail cards to the individual.



Chapter 4: Group

Section information

This is where you can find and change address information for each section of your group. You will also be able to check the names of administrators assigned to each section as well as the contact information for your sales and service representatives.



Contracts and booklets

Available in PDF format here.

Contracts and booklets for plan administrators

▼ General information

	Name	Number
Group information	Company XYZ	123

▼ Contracts

Your contract provides a detailed description of benefits and an explanation of terms. Please indicate below which contract you'd like to view.

Contact your sales or service representative at 780-498-8500 (Edmonton and area) or toll free at 1-800-661-6995 (all other areas) for information about obtaining another copy of your contract.

Available contracts

- Health and dental
- Life

▼ Contract Amendments

Your contract amendments will provide you with information on any modifications that have been made to the terms of your contract. Please indicate below which amendment you would like to view.

Available Amendments

No amendments available

▼ Employee benefits booklets & Benefits at a Glance

Your benefits booklets have been designed to provide detailed information about your Alberta Blue Cross group benefits program. Benefits at a Glance have been designed to provide a brief summary of the information provided in the benefits booklet. Please indicate, below, which section's booklet and Benefits at a Glance you'd like to view.

Select a Section Blank

▼ Benefits booklets

Group number	Section code	Class code
No booklets available		

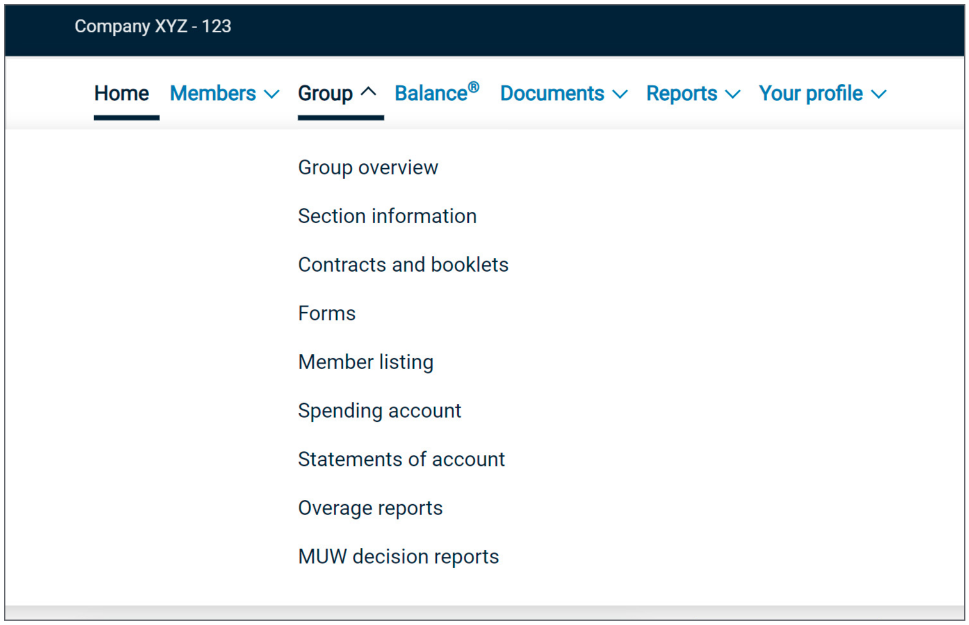
▼ Benefits at a Glance

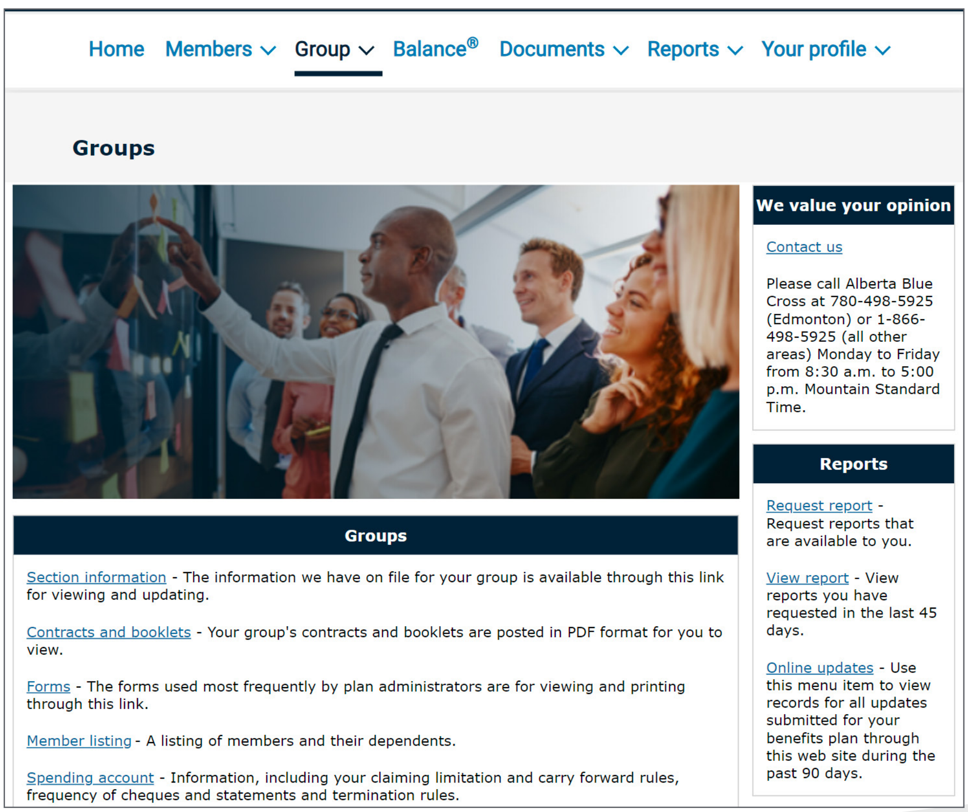
Group number	Section code	Class code	
123	A	-	View Benefits at a Glance

Tip: Use the drop-down menu to choose the section needed.

Forms

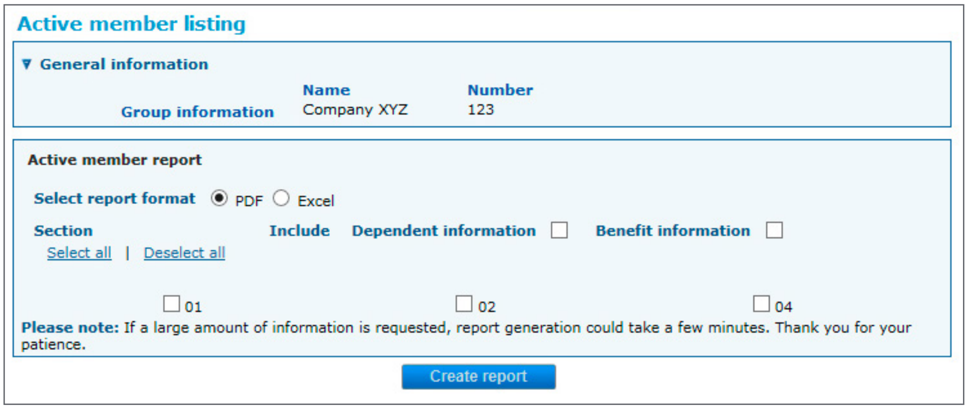
All of the downloadable forms can be found in PDF format here.





Tip: Member listings are only available for the sections you have access to.

Member listing



Member listings can be obtained in either PDF or Excel formats. These listings include employee ID information and, by selecting the appropriate checkbox, the report can also include dependant and benefit information.

Spending account information (if applicable)

Contains rules and information about spending accounts.

from	to	Statement
Jul 01, 2023	Jul 31, 2023	pdf | excel
Jun 01, 2023	Jun 30, 2023	pdf | excel
May 01, 2023	May 31, 2023	pdf | excel

Tip: Use the drop-down to choose from your available sections.

Contact us to turn off paper bills or to sign up for preauthorized debit.

Statements of account

Statements of account are available in both PDF and Excel formats and will display data from the last 12 months.

Statement of account

Select an available section A

▼ Statement of account

from	to	Statement
Jul 01, 2023	Jul 31, 2023	pdf | excel
Jun 01, 2023	Jun 30, 2023	pdf | excel
May 01, 2023	May 31, 2023	pdf | excel

▶ Pre-Authorized Debit information

Draft statement of account

This is a draft statement of account only and is based on our records as of the date requested. Please do not pay the amount shown. Refresh the page if the draft statement of account has a status of "In progress", as it may take several minutes.

If you are making a request after 5 p.m., please note that it will not be produced until after 7 a.m. the following day.

Select an available section A

Requested timestamp	Status	Statement
No draft statement available		

Generate

Understanding your statement of account

A Guide to Your statement of Account is filed in your Group Administrator's binder. Click below to view it online in printable PDF format

- Guide to Your statement of Account
- Statement of Account tutorial video

Your Alberta Blue Cross benefit plan is a prepaid program. Your payment is due the first day of the month in which your group is being billed. If your payment has not been received within five working days from the first of every month, any claims incurred/submitted during that period will be returned to your employees.

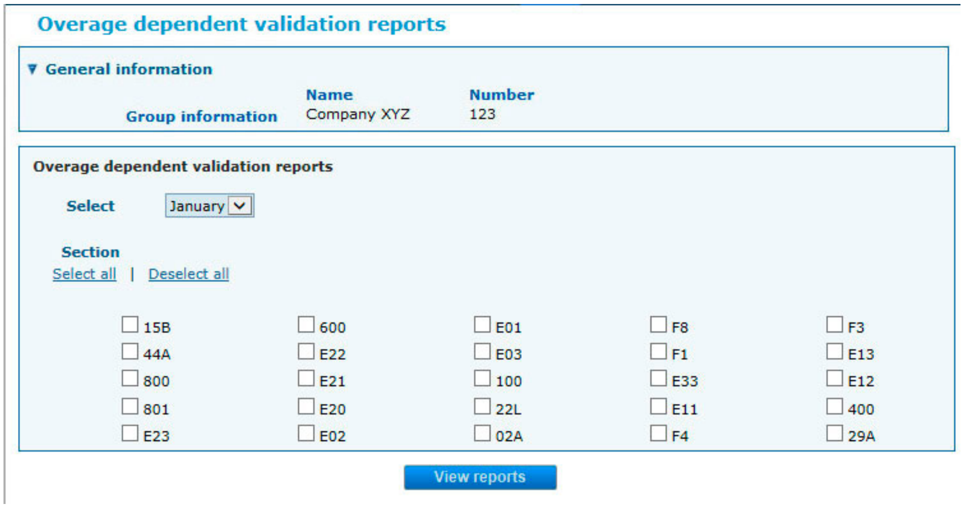
Additions, terminations, and/or changes will be processed when Alberta Blue Cross receives the appropriate form, and adjustments will appear on your Statement of Account.

The perforated portion of page one of your monthly Statement of Account must be forwarded to Alberta Blue Cross along with your payment.

For information about statements that are not currently available through this web site, please phone 780-498-5925 (Edmonton and area) or 1-866-498-5925 (all other areas) Monday to Friday from 8:30 a.m. to 5:00 p.m. Mountain Standard Time.

Over-age dependent validation reports

Over-age dependent validation reports list dependents who are approaching benefit age limits. These monthly and annual reports are available in both PDF and Excel format.
Note: reports are only available for months in which there are over-age dependents.



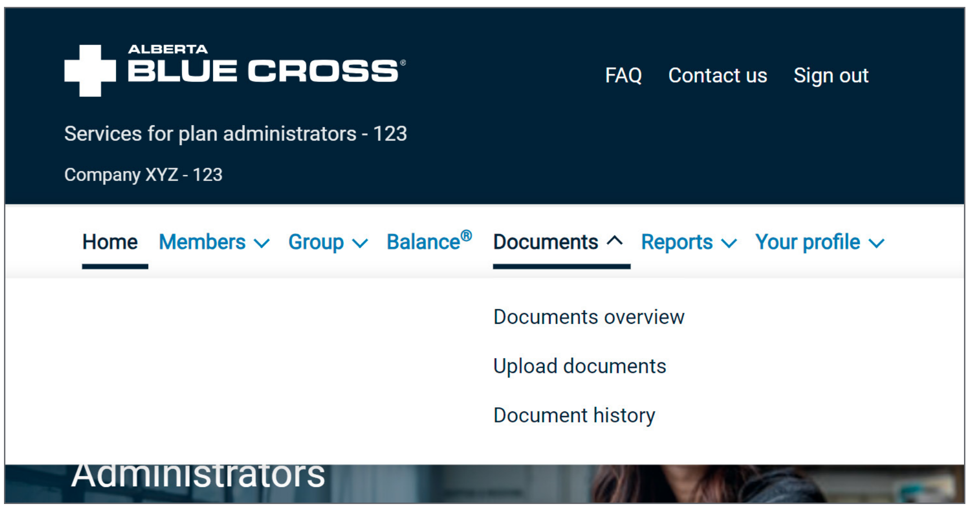
Chapter 5: Documents

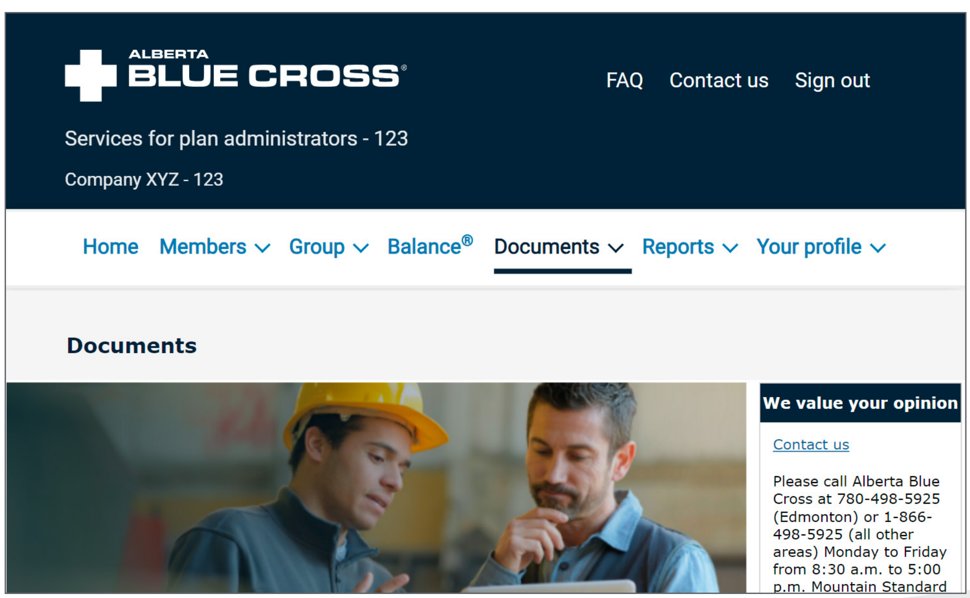
Finding recently submitted updates

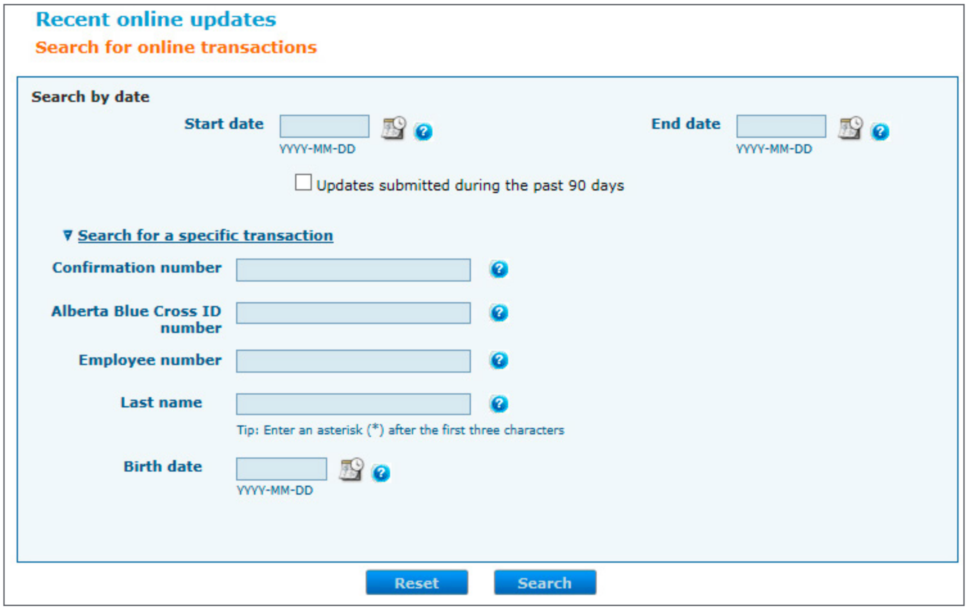
Choose ***Recent online updates*** from the menu at the top of any page.

There are 6 ways to find the record for a submitted update. You may choose to search for:

- **A specific date range** or updates submitted during the past 90 days.
- A particular **confirmation number**.
- The **Alberta Blue Cross ID number** for the plan member whose file has been updated.
- The employee number for the plan member whose file has been updated,
- The plan member's last name.
- Birth date (must be entered with a last name).

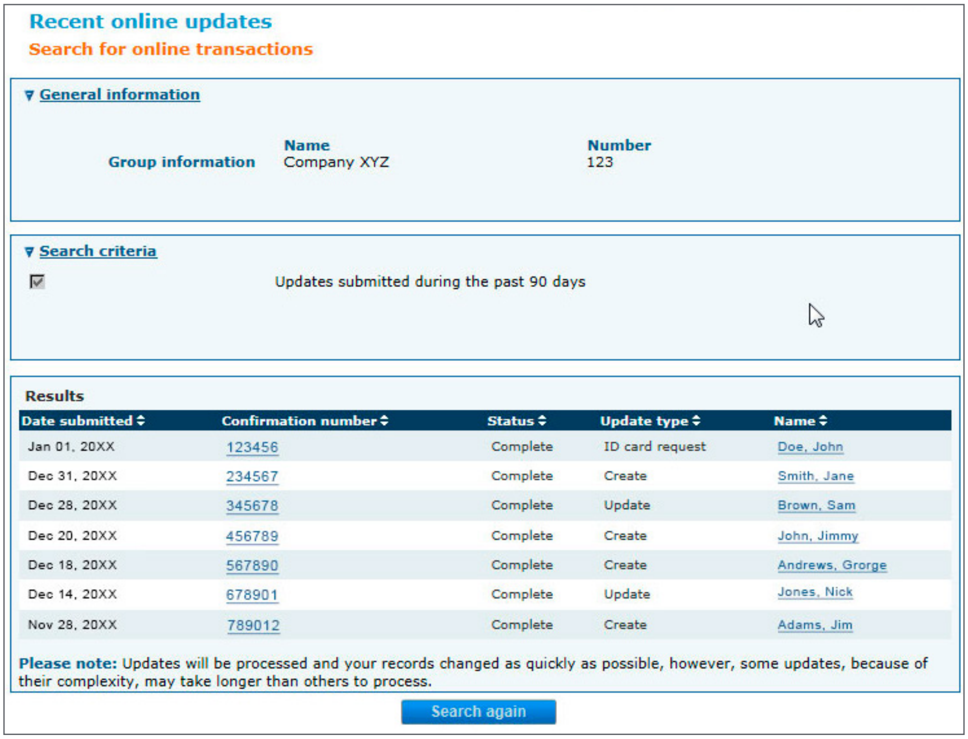






Click the *Search* button to go to the next page.

Depending on the search method you've used, and the number of updates on file for your group, your search could result in several entries (see screen below).



Common questions about updates

How can I find out if my update has been processed?
Click on the *Recent online updates* link in the top menu to run a search to find your update. Click on the name of the individual and look at the status column for a status of either "in progress" or "complete."

I submitted an update through the website. Why doesn't it appear on the list of recent transactions?
All updates that were successfully submitted through the plan administrator website will have a confirmation number assigned to them and will appear on the list of recent transactions. If you do not have a confirmation number for your update, it is possible the update was not submitted successfully. Please call Alberta Blue Cross for assistance.

Why do I see old information for a plan member when I know an update has been completed?
Try clicking the *Refresh* button on your browser. Sometimes when you return to a page you've looked at previously, your browser displays a page it has saved in a temporary file on your computer rather than obtaining a new page from the website. This is intended to save you time and to save the network the burden of some additional traffic. Refreshing your screen allows you to view the most recent information on online services and discard any "cached," or temporarily saved files.

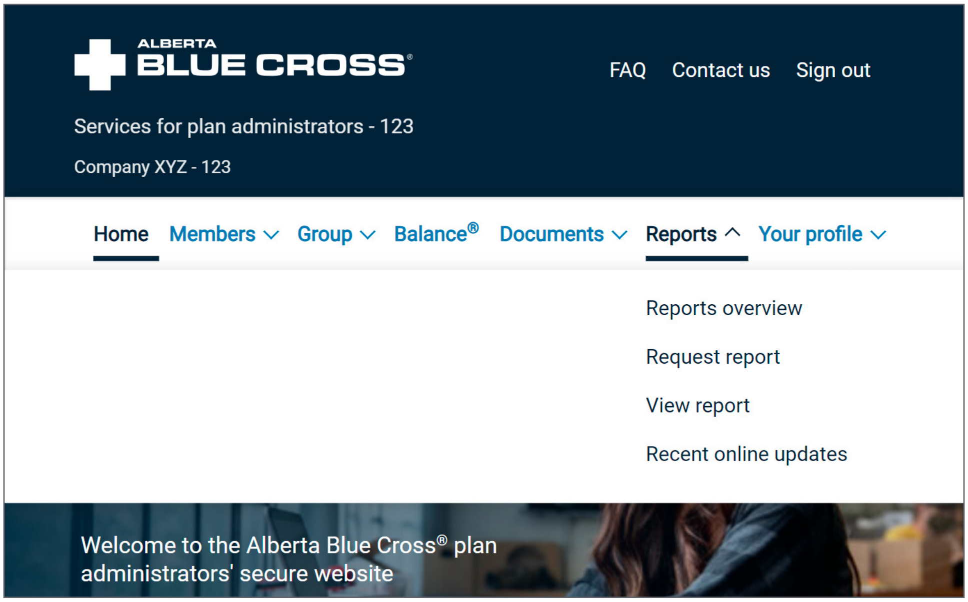
How do I find out about a plan member update that was not submitted through the website?
If you have submitted a paper form with a plan member update, find its status by calling your Alberta Blue Cross administrator at 780-498-5925 (Edmonton and area) or toll-free at 1-866-498-5925 (all other areas), Monday to Friday from 8:30 a.m. to 5 p.m. Mountain Time.

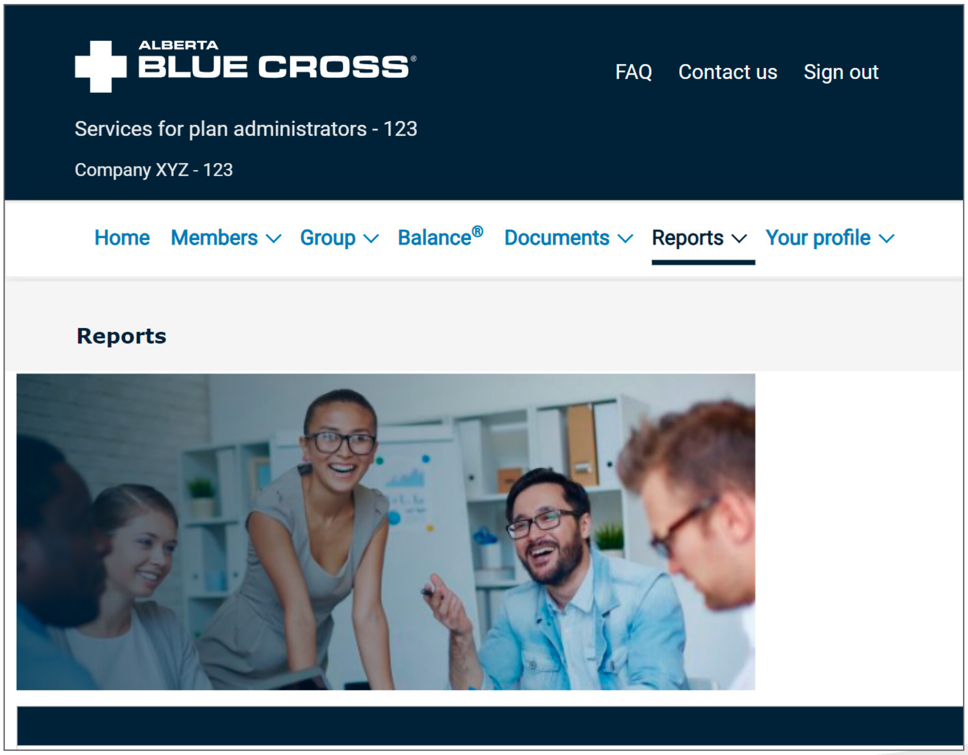
Please note: Updates will be processed and your records changed as quickly as possible, but some updates, because of their complexity, may take longer than others to process.

Chapter 6: Reports

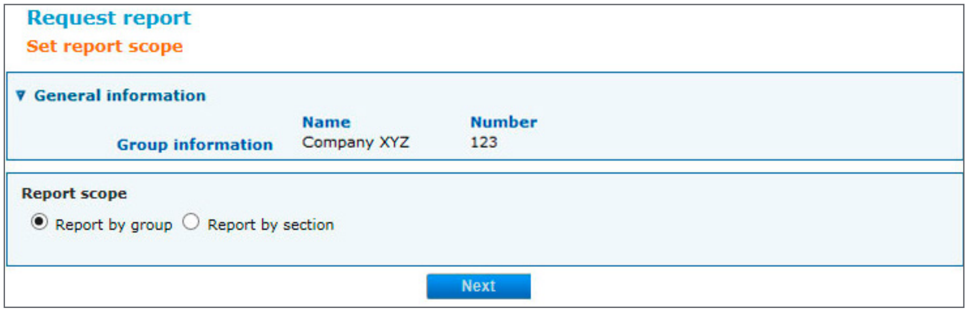
In the reports section of the site you can request and view health, dental and life reports based on group or section.

To request a report, you'll select ***Request report*** from the ***Reports*** menu.





Then you will choose whether you'd like to view the reports by group or by section.



After clicking ***Next*** you'll see a list of all the available reports. You can select as many as you'd like and adjust the time frames as necessary.


Report and date

Description of all available reports

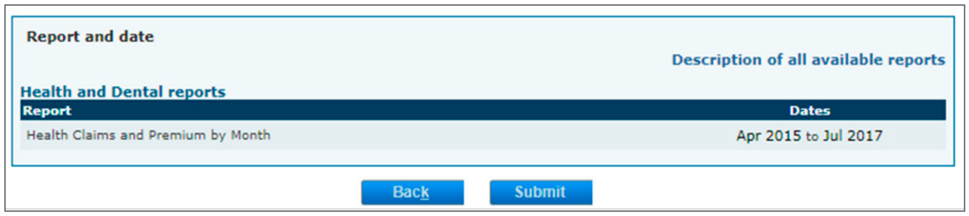
Health and Dental reports

1-10 of 11 Next

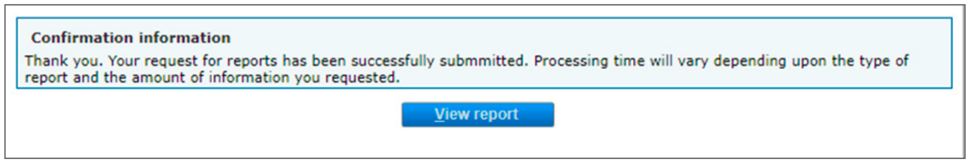
Report	From		To	
Health Claims and Premium by Month	2015	Apr	2017	Jul
Health Benefit Summary	2015	Apr	2017	Jul
Health and Dental Claims Summary	2015	Apr	2017	Jul
Drug Profile by Pharmacologic-Therapeutic Classification PTC	2015	Apr	2017	Jul
Drug Claims by Category	2015	Apr	2017	Jul
Distribution of Drug Claims by Dollar Range	2015	Apr	2017	Jul
Dental Claims and Premium by Month	2015	Apr	2017	Jul
Top 75 Dental Procedures	2015	Apr	2017	Jul
Dental Claims by Category	2015	Apr	2017	Jul
Distribution of Dental Claims by Dollar Range	2015	Apr	2017	Jul

Back Next

After clicking ***Next*** you will see a review page listing the reports you've requested and if you approve, you will then click ***Submit***, which will take you to the confirmation page.



Clicking ***View report*** will take you to the view report page where you can view the reports you've requested and their status.



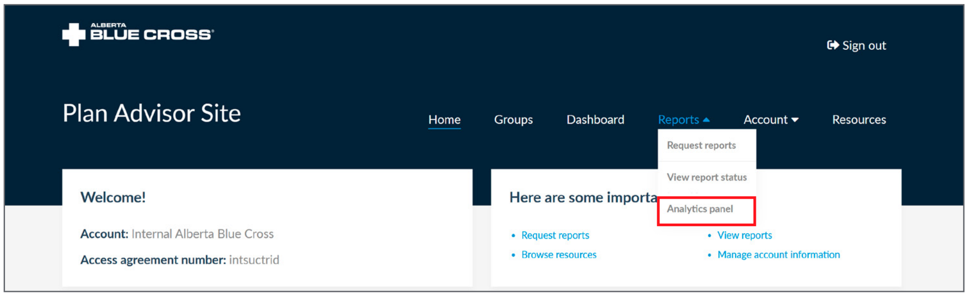
View report

Analytics panel

Step by step instructions

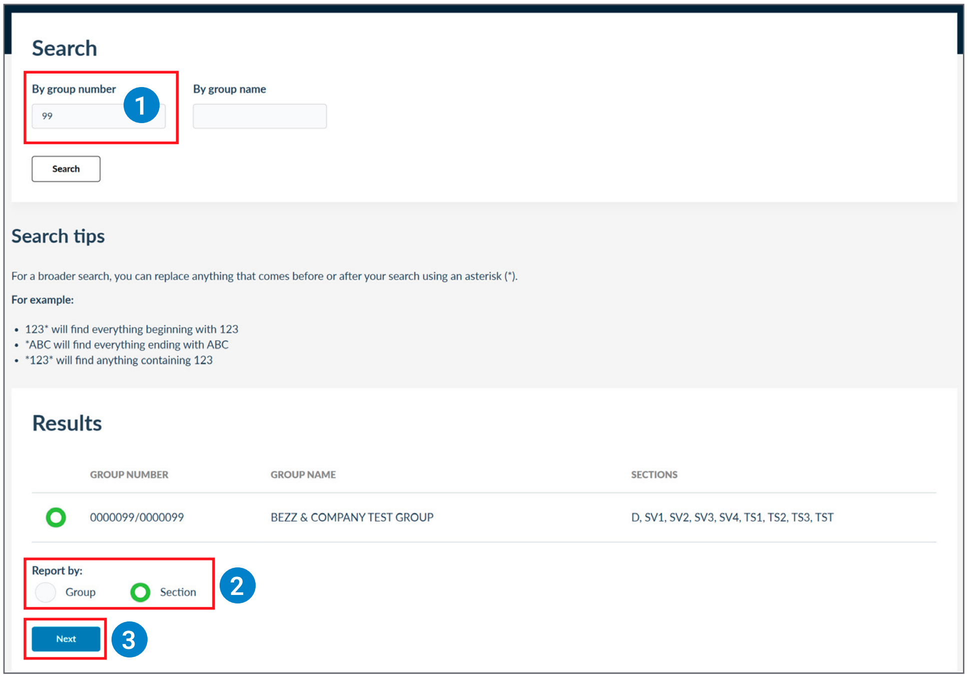
Step 1:

Select the Analytics panel option from the Reports drop-down menu.



Step 2:

Input the group number or name you would like to view data for.

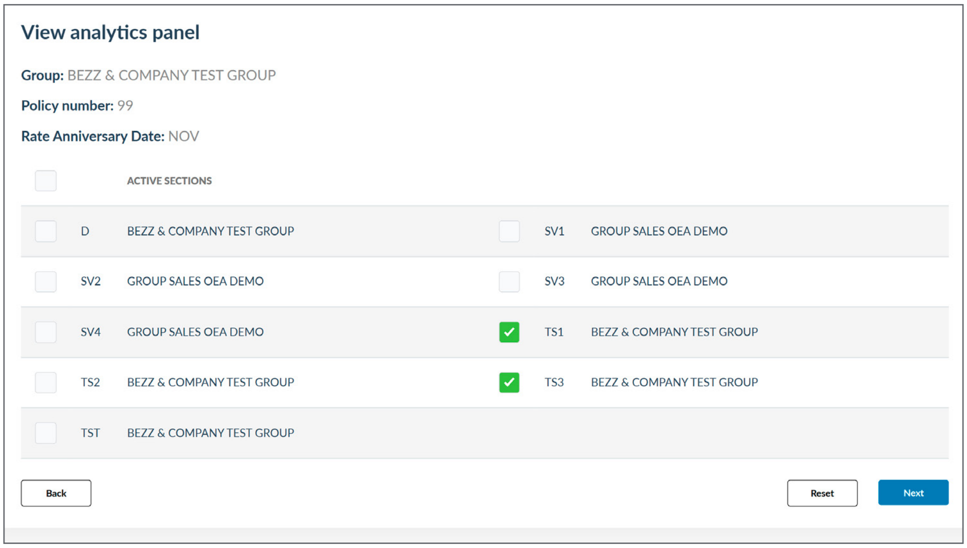


1. **Input group number here if searching for specific group or group name.** There is currently no functionality to allow for selecting multiple groups for reporting, though you can view multiple groups to select from.
2. Select whether you want to be able to select certain sections/ranges of sections, or view all data for that group.
3. Select **"Next"**.

The following step is only applicable if "Report by Section" was selected.

Step 3:

Select the applicable section(s) you would like to view data for.



Select the boxes next to the section(s) you want to view, they will turn green with checkmark upon selection.

**Only applicable if you've selected Report by 'Section' option on previous page.*

Step 4:

Select the Analytics panel by group parameters.

1. Use the benefit period dropdown to select a specific benefit period (it always defaults to the main Health benefit period on this page) or select ***'All benefit periods'*** to view a 5+ year trend.
2. Use the date range slider to view a specific year, quarter, or month.
3. Use the menu option to navigate between tabs for overall or specific lines of benefit views.
4. Export the screen you are seeing in either PDF (for sharing) or machine-readable csv file (to produce your own analysis).
5. Find contact forms to get your analytics panel and data-related questions directly to a team that can assist you.
6. Open another window with helpful information and glossary definitions for the data you are viewing.
7. Selected KPIs to highlight overall trends for quick insights.
8. Select different attributes and/or metrics for different perspectives in your analysis.
9. Tooltips are located on each graph or KPI to increase understanding and transparency in the information you're looking at.

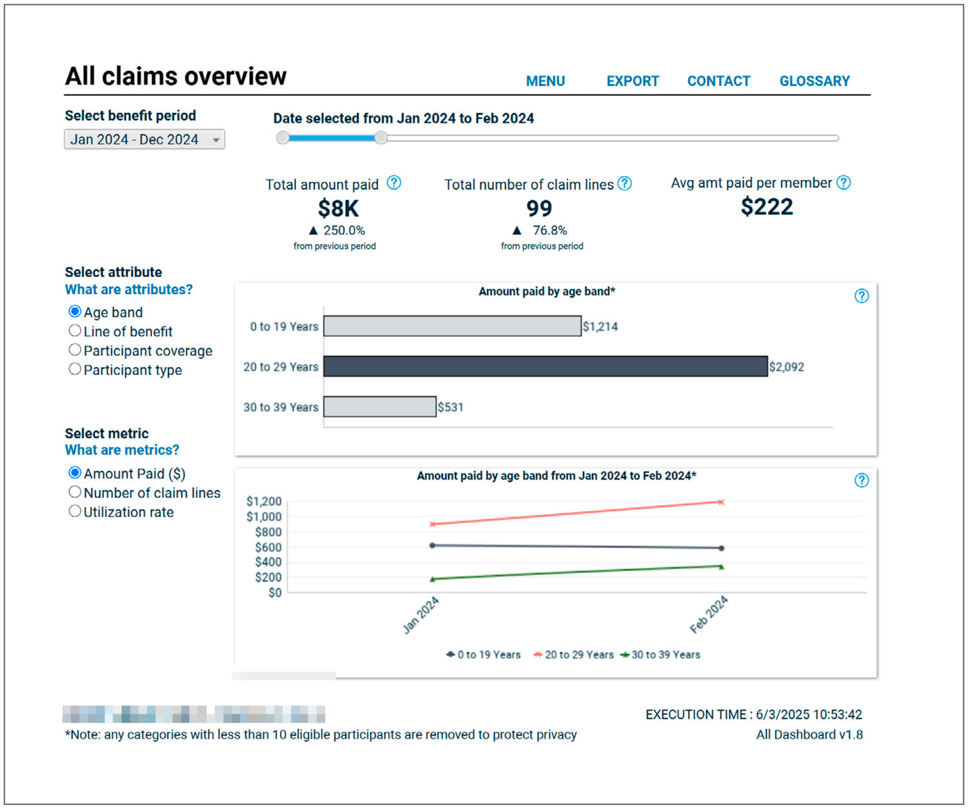
Keeping participant's data safe and secure

For smaller groups (especially those under 50 lives), you may notice that data appears to be missing from any claims utilization graphs depicting the age band. This is an intentional filter meant to protect the participant's data private when the category contains less than 10 individuals in the selected date range.

For example, this group only shows 3 age band categories (0-19, 20-29, and 30-39) had 10 or more participants in the Jan–Feb 2024 period. All age band categories will display as eligible participants on the Participants eligibility tab:

Please note: Groups with fewer than 10 lives do not have access to the analytics panel. This is updated live, so a group that has 10 members one day and 9 members the next will have its analytics panel disabled on the day it has 9 members.

Only the 0-19, 20-29, and 30-39 will be displayed in a Claims by Age band graph:



Other attribute categories will still show the full amount of claims paid per category.

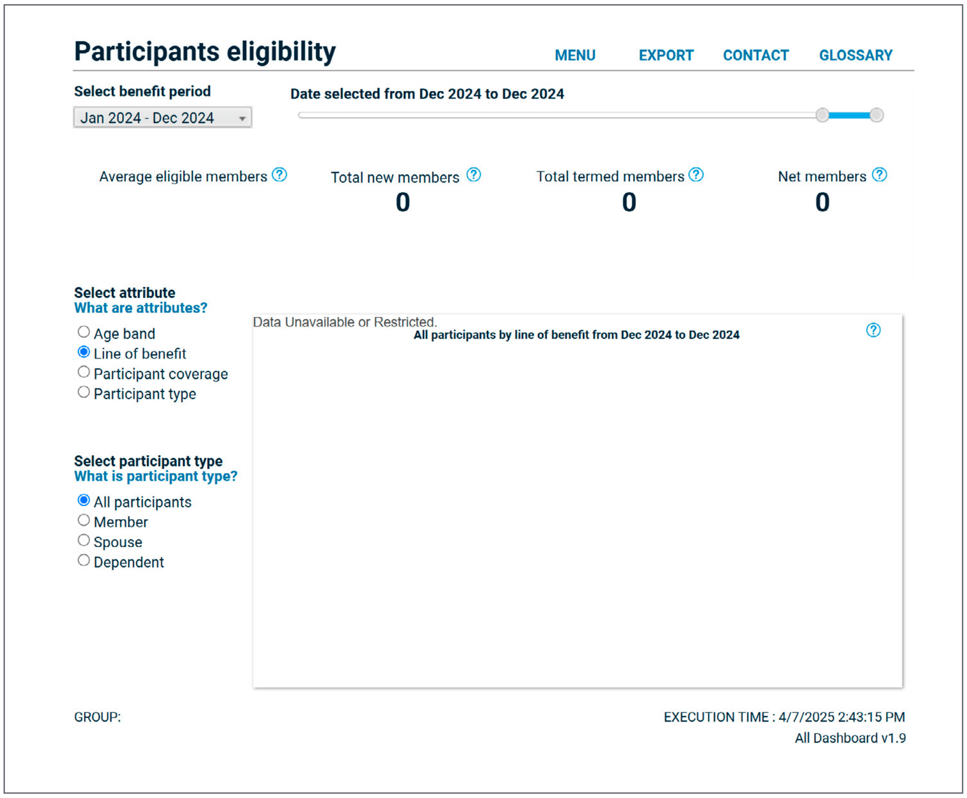
Troubleshooting/FAQ

Problem:

The analytics panel appears empty/I cannot select any dropdown menus:

Answer:

The analytics panel data is refreshed nightly between 3 a.m. and 6 a.m. MT, during that time this screen is expected to appear. Please check back after 6 a.m. MT, and if the problem still persists, please contact your rep for assistance.



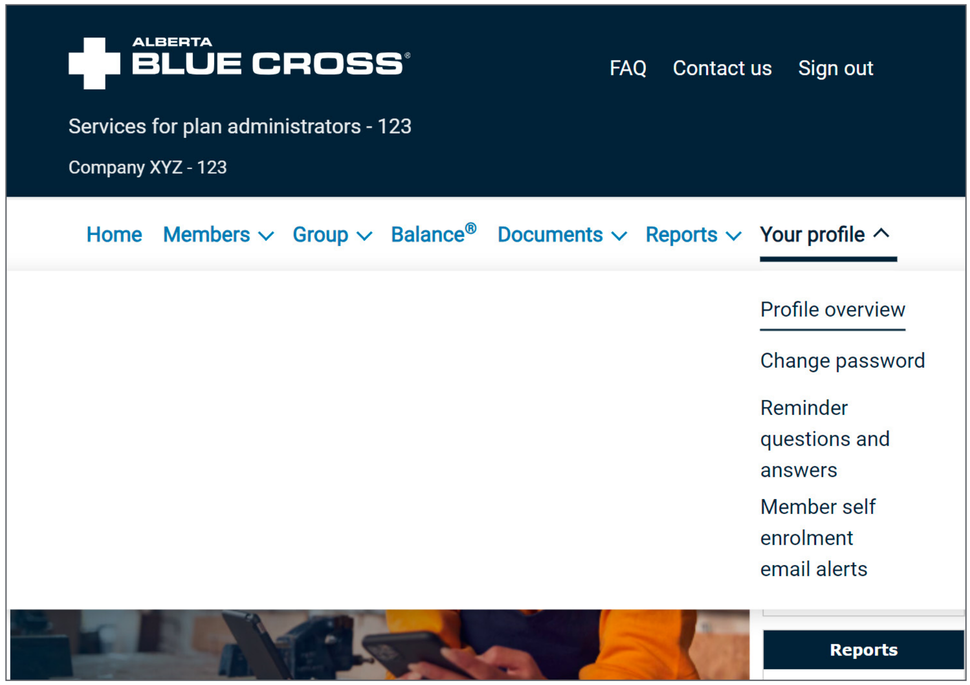
Question:

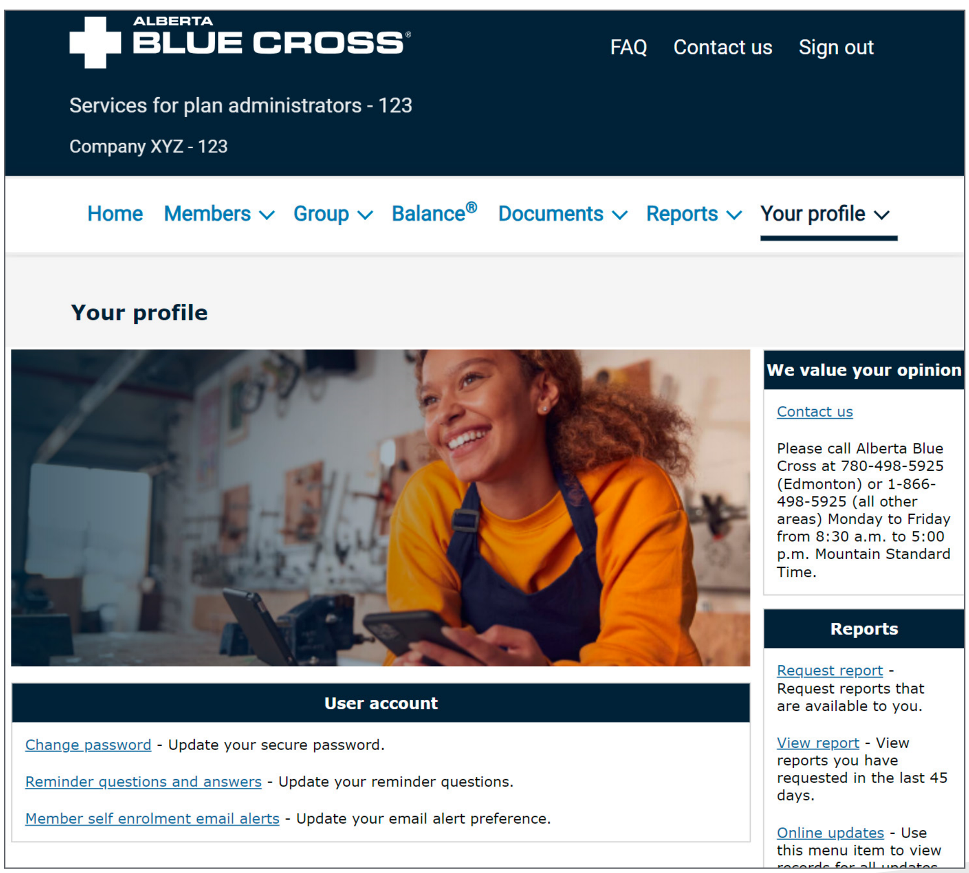
Why are there multiple benefit periods in the dropdown menu?

Answer:

This can occur if a group has sections with different benefit periods on the Health line of benefits. By using the 'Report by section' option upon navigating to the Analytics panel, you can filter on sections that share a Health line of benefit to have a more definitive view or use the 'All benefit periods' options to see trends regardless of benefit periods. See the line of benefit tab in the Glossary for further information.

Chapter 7:
Your profile information





Passwords/security questions

Changing your password

Choose *Your profile > Change password* in the menu bar at the top of the page.

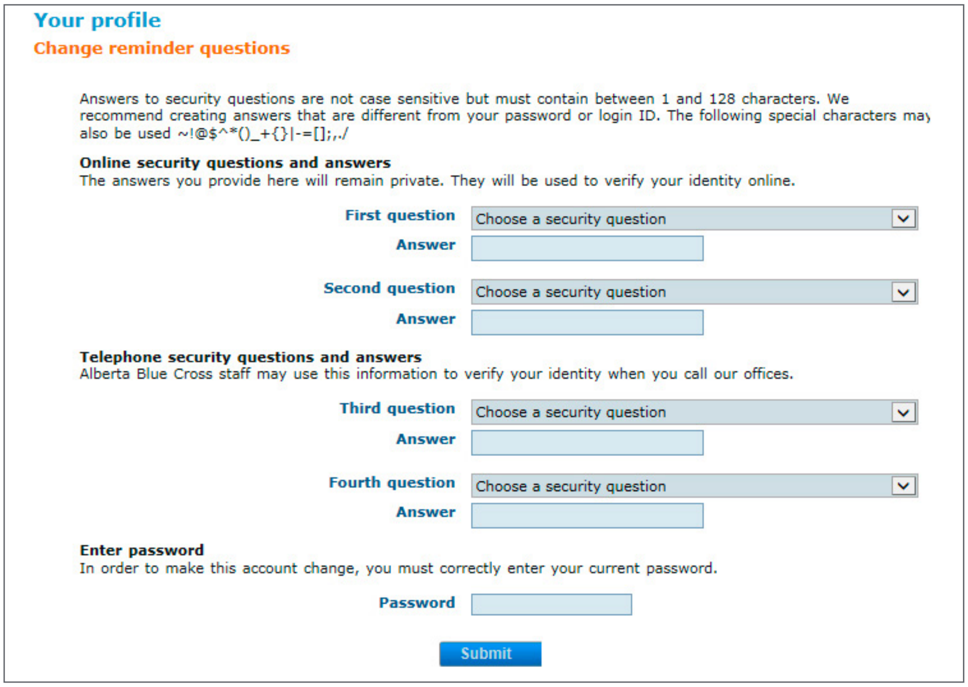
Changing your security questions and answers

Choose *Your profile> Reminder questions and answers* in the menu bar at the top of the page.

Answer the questions provided and enter current password
Depending what you want to do (only questions, telephone or password change), you will need to fill out different information.

Submit the change to Alberta Blue Cross by clicking the ***Submit*** button. If you have correctly entered the information, you will see a page confirming that the change has been submitted.

Please note: For security reasons, your reminder/security answers cannot contain your password, and your questions and answers must all be different. There is no time limit for how long a security question can be active.



Your profile

Change reminder questions

Answers to security questions are not case sensitive but must contain between 1 and 128 characters. We recommend creating answers that are different from your password or login ID. The following special characters may also be used ~!@$^*()_+{}|-=[];,./

Online security questions and answers
The answers you provide here will remain private. They will be used to verify your identity online.

First question Choose a security question
Answer

Second question Choose a security question
Answer

Telephone security questions and answers
Alberta Blue Cross staff may use this information to verify your identity when you call our offices.

Third question Choose a security question
Answer

Fourth question Choose a security question
Answer

Enter password
In order to make this account change, you must correctly enter your current password.

Password

Submit

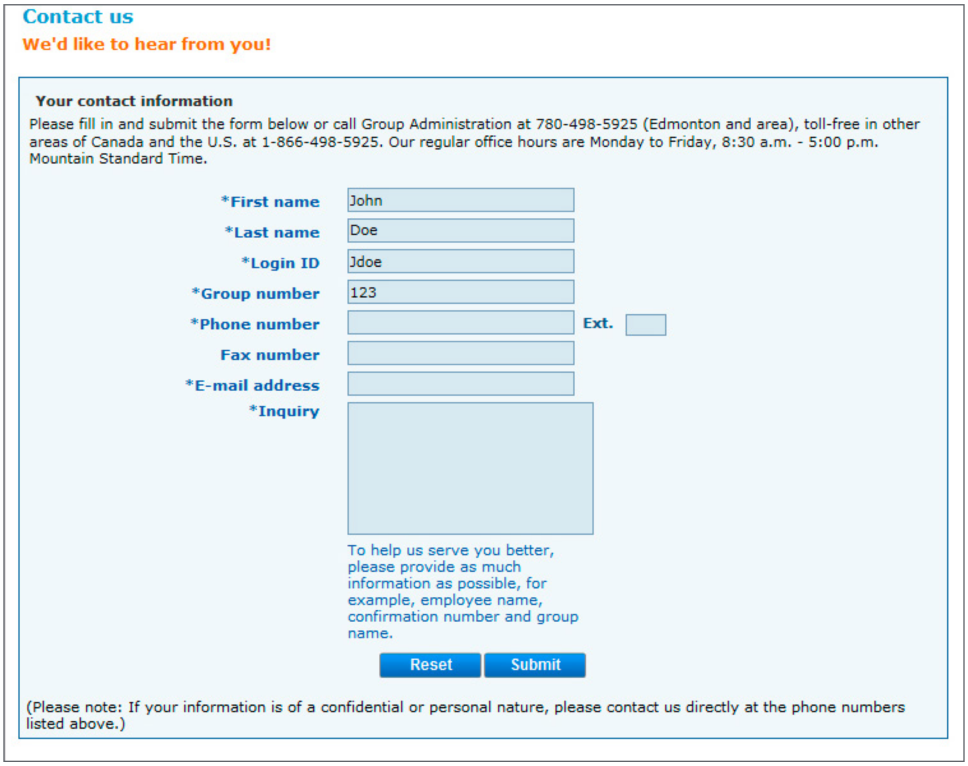
Chapter 8: Signing out securely

You will be automatically signed out after 30 minutes of inactivity, but we recommend using the ***Sign out*** function in the top right corner of the main page to close your web session securely.

To protect plan members' privacy and security we recommend signing out whenever you will be away from your computer.

Chapter 9: Contact us

The ***Contact us*** page is linked from all menus on the site and provides you with an email form to fill out for your Alberta Blue Cross inquiries. Your first name, last name, login ID and group number will be automatically populated for your convenience. You can reset the information if you make a mistake prior to submitting it.



Contact us

We'd like to hear from you!

Your contact information

Please fill in and submit the form below or call Group Administration at 780-498-5925 (Edmonton and area), toll-free in other areas of Canada and the U.S. at 1-866-498-5925. Our regular office hours are Monday to Friday, 8:30 a.m. - 5:00 p.m. Mountain Standard Time.

*First name John

*Last name Doe

*Login ID Jdoe

*Group number 123

*Phone number Ext.

Fax number

*E-mail address

*Inquiry

To help us serve you better, please provide as much information as possible, for example, employee name, confirmation number and group name.

Reset Submit

(Please note: If your information is of a confidential or personal nature, please contact us directly at the phone numbers listed above.)

Chapter 10: Terms of use

Your responsibilities

Your role in ensuring security
The Terms and Conditions outlined here are intended to establish operating procedures that appropriately restrict access to confidential information and clearly explain the rights and responsibilities of all parties involved.

Since the Terms and Conditions could be amended, we recommend reviewing them regularly.

Document retention
Plan administrators must retain original application and change forms for employees either for the entire course of their employment or the date the employee is no longer eligible to make application for a claim under their policy, whichever is later. Application and change forms must be duly signed, dated and stored in a secure place.

Failure to provide necessary support documents when requested to do so could severely impact coverage provided. Should the original form be required for examination, and it is found to be unsigned and undated, the application will be considered void.

Alberta Blue Cross reserves the right to conduct on-site audits in order to verify the existence and integrity of any application or change form submitted through secure online services for plan administrators, and may request that the original application or change form be forwarded to them at any time.

Requirements for claim applications for life insurance benefits (if applicable)
When a claim for life insurance benefits for an employee or their dependents is made, the plan administrator must forward all original applications and change forms on file for that employee or dependent with the claim submission. Beneficiary information, including the latest beneficiary change, must be retained for 2 years following submission of the claim.

Beneficiary changes are permitted. In the case of irrevocable beneficiary designations, a signed letter from the irrevocable beneficiary is required.

Disclaimer against loss or damages
Plan administrators use the secure online services website solely at their own risk. The website and its contents are provided “as is” and “as available” and Alberta Blue Cross, to the fullest extent permitted by law, disclaims all warranties of every kind, whether express or implied, statutory or otherwise. Alberta Blue Cross explicitly disclaims any representation, warranty or condition of merchantability, fitness for particular uninterrupted or error-free services, or inter-operability of products and services, whether arising by usage or trade, course of dealing, course of performance, statute or otherwise.

Alberta Blue Cross, its affiliates and their respective officers, directors, agents, employees and suppliers are not responsible for any loss or damage the policy holder and its representative(s), or any other party claiming through the policy holder, may suffer in connection with use, misuse or inability to use the secure online services for plan administrators website as well as any links from this site and the information obtained from them. This limitation applies regardless of the form of action, whether based on warranty, contract, tort or other legal theory.

Alberta Blue Cross assumes no responsibility or liability for any damage to the plan administrator's computer equipment or property, or any business losses resulting from viruses in connection with the plan administrator's access to or use of the secure online services website as a result of receiving or using data, text, images, files or other site materials.

Alberta Blue Cross is not responsible for, and will not be liable to the plan administrator or anyone else, for any damages in connection with an e-mail sent to Alberta Blue Cross or an e-mail Alberta Blue Cross sends to the plan administrator at their request.

Site content

Any use of the content of the secure online services for plan administrators website not expressly permitted by these terms of use is a breach of this agreement and may violate copyright, trademark or other laws. All rights not expressly granted herein are reserved.

All rights of ownership associated with secure online services for plan administrators are retained entirely by Alberta Blue Cross and will not be transferred, assigned, loaned, leased, rented, licensed, sold, distributed or otherwise disposed of in any way whatsoever without prior written consent of Alberta Blue Cross.

All of the contents of the secure online services for plan administrators website, including links and the Terms and Conditions, may at any time be revised with or without notice. The Policyholder's representative is bound by revisions to the Terms and Conditions and should therefore review them regularly. (Please refer to the Terms and Conditions posted here for the most recent version.)

Alberta Blue Cross may, for the plan administrator's convenience, provide links throughout the secure online services to other websites, or may reference other products, services, processes, trade names, trademarks, manufacturers or suppliers. Such links or references do not necessarily constitute or imply endorsement, sponsorship or recommendation by Alberta Blue Cross. It is the plan administrator's responsibility to verify any information contained within linked sites before relying on it.

All information and software on the secure online services for plan administrators website is protected by copyright laws and cannot be sold, published, distributed or used by the policy holder or its representative(s) for commercial purposes. The plan administrator is free to use the content for administering the policy holder's benefit plan provided they acknowledge all copyright notices and other proprietary notices. They may in no way modify, reformulate, disassemble, reverse engineer or decrypt any of the secure online services for plan administrators contents.

The secure online services for plan administrators website may contain registered and unregistered trademarks, trade names and service marks belonging to, or used under license by, Alberta Blue Cross. The appearance of such marks and names does not convey any rights to the plan administrator to use them.

Agreement and consent

The policy holder irrevocably consents to the exclusive jurisdiction of the courts of Alberta (and federal courts situated in Alberta) in connection with any matter arising under the secure online services for plan administrators Terms and Conditions and agrees to be bound by these laws. The secure online services for plan administrators Terms and Conditions will be governed by and construed in accordance with Alberta law (and Canadian laws applicable in Alberta), without regard to conflict of law principles or provisions.

In using secure online services for plan administrators, the policy holder representative(s) agrees to comply with appropriate and legally required standards of privacy, confidentiality and security, including those specified in the secure online services for plan administrators Terms and Conditions.

By accessing and using the website, the plan administrator, on behalf of the policy holder, consents to the Terms and Conditions and to Alberta Blue Cross collecting, using, storing and disclosing personal information for the purposes of verifying and assessing claims and managing your benefit plan.

Chapter 11: Glossary

Adobe Portable Document format (PDF): Files in this format can be read with a free, downloadable software package called Adobe Reader. The software is available from the Adobe web site at the following address: **http://www.adobe.com/prodindex/acrobat/readstep.html**

Confirmation number: Each update submitted through the site is assigned a "confirmation number" to facilitate tracking inquiries and to verify submission.

ID number: The plan member's number on his/her Alberta Blue Cross identification card. This could be an identification number issued by Alberta Blue Cross or an employee number.

Member: The primary plan member, in most cases the employee in a group plan.

Participant: Any individual with coverage under the plan. This could be the primary plan member or dependents.

Participant coverage: Single, family or couple. Called "benefit status" on our forms.

Participant type: Member, Spouse, Child, Other.

Plan administrators agreement number: Each "policy holder agreement" form includes an agreement number in the top right-hand corner. The agreement number, a group number, first and last name must be used to verify your identity the first time you enter the site, and subsequently if you need to reset your password.

Radio buttons: Named after the buttons on old-fashioned, console radios, these buttons always come in groups of 2 or more. They allow you to choose only 1 of a set of option. When you push in 1 button on the radio, the other buttons pop out.

Review page: After you have changed the information on a plan member's file through the update, transfer, reinstate or terminate functions, you will see a "review page" where you can review and revise information before finally submitting it to Alberta Blue Cross.

Security question: When you registered for site access, you would have chosen 4 security questions to answer. 2 of these are used to verify your identity when calling our offices, and 2 can be used to verify your identity should you need to reset your password.