



# **Oxford Benefit Management**

## **(OBM) Online Member Maintenance**

### **Administration Guide**





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Thank you for selecting a Specialty Benefit Solutions (SBS) package through UnitedHealthcare Specialty Benefits.

This administration guide is merely a guide and does not take the place of your group contract. For specific legal guidelines and requirements, please refer to your group contract.

User Name: \_\_\_\_\_

Password: \_\_\_\_\_



## Welcome

Welcome to Online Member Maintenance (OMM), OBM's online portal that allows you to perform most member transactions in the comfort of your own office with the click of a mouse. With OMM you can manage all member level additions/terminations/changes for all employer groups that you are attached to.

In the following pages, you will find instructions on how to perform member level changes using OMM. As always, if you have any questions please reach out to our OBM service team at 888-200-1154.

## Accessing the Link for Online Member Maintenance (OMM)

Accessing OMM is simple. You can follow the steps below to access the OMM tool.

Click on the Online Member Maintenance link to bring you to the log in page.

The screenshot shows the Oxford Benefit Management website. At the top left is the Oxford Benefit Management logo. To the right are links for 'About Us' and 'FAQs'. Below the logo is a banner for 'OBM Prepackaged Benefits' featuring images of people. A date indicator shows 'Today is April 11, 2011'. The main content area is divided into sections: 'Brokers' with a 'Return to OBM home page' link, a paragraph about the partnership with Oxford Health Plans, and buttons for 'Products', 'OBM Plans', and 'Rates'. Below this is a 'How to Sell' section with a 'How to Sell' button. A 'Rate Quotes' section on the right contains a form for entering group information and a link for 'Instant New Business Rate Quotes!'. Below that is a 'Member Maintenance' section, which is circled in orange, containing the text 'Perform most member transactions such as adds/terms/changes.' and a link for 'Online Member Maintenance'. At the bottom is a 'Service Locator' section for finding third-party vendors.

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About Us • FAQs

**OBM Prepackaged Benefits**

Today is April 11, 2011

**Brokers** [Return to OBM home page](#)

Created by [Oxford Health Plans](#), Oxford Benefit Management is an exclusive partnership of specialty products designed to offer employers an innovative selection of quality healthcare products. Please select the buttons below to learn more about our Products, OBM Plans, and New Business Rates.

**Products** **OBM Plans** **Rates**

Learn how to begin [Doing Business With OBM](#). For more detailed information on selling the OBM product, click on "How to Sell."

**How to Sell**

Please Note: Oxford Benefit Management, Inc., acts as the distribution company for products, including UnitedHealthcare Dental<sup>®</sup>, UnitedHealthcare Vision<sup>®</sup>, Optum Health, UnitedHealth Allies, Inc. and Unimerica Workplace Benefits (Unimerica). The UnitedHealthcare Dental<sup>®</sup> Plans and UnitedHealthcare Vision<sup>®</sup> products are either underwritten or provided by: United HealthCare Insurance Company, Hartford, Connecticut; United HealthCare Insurance Company of New York, Hauppauge, New York; or United HealthCare Services, Inc. The Unimerica products are underwritten by Unimerica Insurance Company and United HealthCare Insurance Company. In New York, products are underwritten by Unimerica Life Insurance Company of New York.

The UnitedHealth Allies Discount Program is administered by HealthAllies<sup>®</sup>, Inc., a discount medical plan organization located at 505 N. Brand Blvd., Suite 850, Glendale, CA, 91203, 1-800-860-8773. UnitedHealth Allies is NOT insurance.

**Rate Quotes**

Enter simple group information to immediately receive OBM new business rates.

- [Instant New Business Rate Quotes!](#)

For renewal rates, please contact group services at 888-200-1154, or send an email request to [obm@healthinsight.com](mailto:obm@healthinsight.com). Renewal rates will be available 60 days prior to group renewal date.

**Member Maintenance**

Perform most member transactions such as adds/terms/changes.

- [Online Member Maintenance](#)

**Service Locator**

Search our third-party vendors' listing to find out how to access their services.

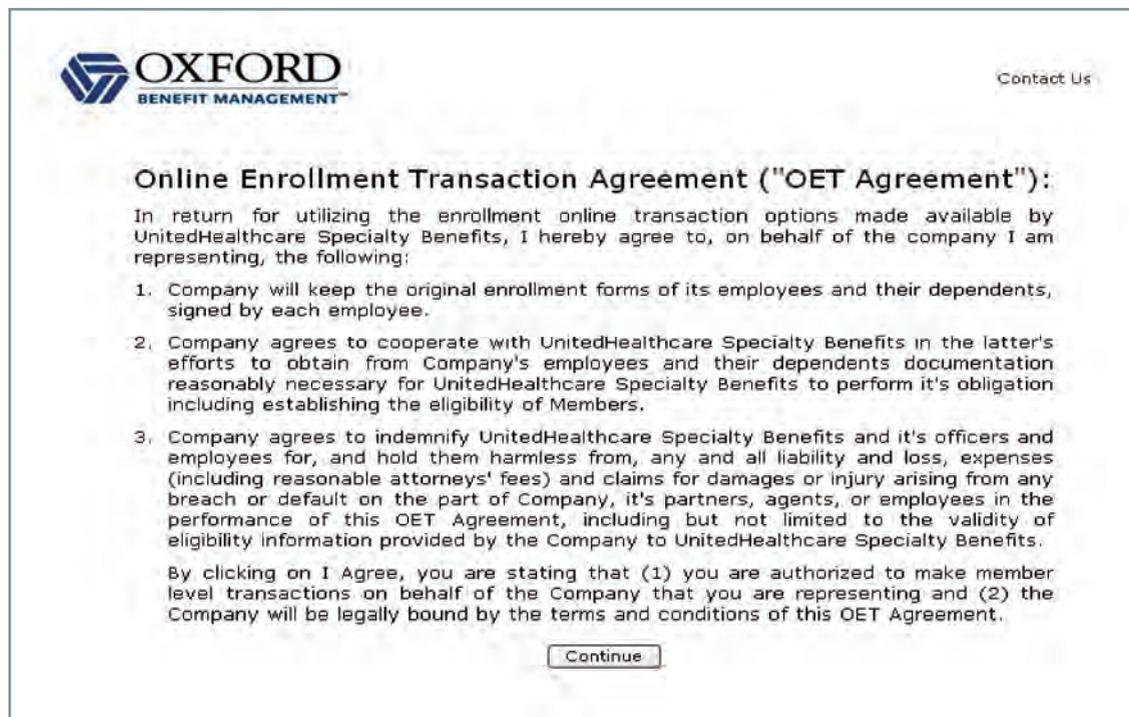
## Logging In



Please enter the user name and password that have been sent to you via email.

Each time you log in you will need to agree to the Online Transaction Agreement by checking the I Agree box by clicking the I agree box and then clicking submit.

## Online Transaction Agreement



The full online transaction agreement will appear only upon your 1st log in. This agreement states that you are authorized to make member level changes for the groups associated with you. It also states that the group is responsible to keep the original signed enrollment forms as documentation of any changes made within the OMM tool. In addition, it states that you are working on behalf of the group and the group will be legally bound to the changes that you make in this tool. Click "Continue" to enter the tool.

## My Account

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Contact Us Logout

My Account

Group E-Mail: Joe\_A\_Sample@UHC.COM

User ID: testgroup21

Broker:

Administrator: JOE SAMPLE

Change Password: .....

Confirm New Password: .....

Security Question #1: What is your mother's maiden name? ▾

Security Answer #1: mother

Security Question #2: What is your father's middle name? ▾

Security Answer #2: father

Update My Account Cancel

If you are unable to change information that requires an update, please contact group services at 888-200-1154 or by email at OBM@healthinsight.com.

After acknowledgement of the full Online Transaction Agreement, the My Account page will be presented. On this page, you will be able to change your password, and set two security questions. These questions will be used in the future should you forget your password.

With your first time to the My Account page, you will be required to change the password and answer security questions before you are able to move on.

The My Account page will be available to you at any time while logged into the OMM tool. You simply have to click on the My Account link at the top of each page and you will be brought to the My Account page. Your password and/or security questions can be changed at any time. Your user name cannot be changed.

When you make changes to your account page, click “*Update My Account*”. This will save your changes and bring you to the Group List page. If you click the “*Cancel*” button, you will be brought to the Group List page with no changes saved.

## Group List

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My Account Contact Us Logout

### Groups

*Click on the Group Name for enrollment information*

3 Policy Number:

4 Group Name:  Search Display All

2 Group Name Filter: 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  
0 1 2 3 4 5 6 7 8 9

Group Name	Policy Number	Status	Coverage Effective Date	Coverage End Date
ABC GROUP	006886	ACTIVE	01/01/2010	
RENEWAL STRATEGY TEST CASE 16	006871	ACTIVE	01/01/2010	
RENEWAL STRATEGY TEST CASE 1	000585	ACTIVE	01/01/2010	
RENEWAL STRATEGY TEST CASE 25	006880	ACTIVE	01/01/2010	
RENEWAL STRATEGY TEST CASE 7	006862	ACTIVE	01/01/2010	
RENEWAL STRATEGY TEST CASE 12	006867	ACTIVE	01/01/2010	
RENEWAL STRATEGY TEST CASE 13	006868	ACTIVE	01/01/2010	
RENEWAL STRATEGY TEST CASE 23	006878	ACTIVE	01/01/2010	
RENEWAL STRATEGY TEST CASE 10	006865	ACTIVE	01/01/2010	
RENEWAL STRATEGY TEST CASE 11	006866	ACTIVE	01/01/2010	

Upon entering the tool, you will see a list of all groups attached to your producer record. You have four options to search for your group.

1. **Scroll down the list.** The list will be sorted by status (Active, Terminated) then in alphabetical order by group name.
2. **Use the Group Name Filter:** Click on the 1st character of the group's name. This will filter the list of groups to show only those that start with the character that you selected.
3. **Policy Number Search:** Enter the group's policy number and click search. Only the policy number of the group that you entered will appear in the results.
4. **Group Name Search:** Enter the group's name and click search. Only the groups with the name that you entered will appear in the results. You may also filter by entering the first few characters of the group name.

Please note that you also have the ability to sort the list by clicking on the column headers. For example, if you want to look for a group by effective date, you can click the underlined header, "Coverage Effective Date" and the groups will sort by that field.

Once you locate the group that you are looking for, click on the group name and you will be brought to the group's member listing.

## Managing Members

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Transaction History **(B)** My Account **(C)** Contact Us **(D)** Logout **(E)**

**Group Info**

- Group ID: 008239
- Group Name: TEST GROUP
- Group Plan: PREFERRED SPECIALTY OPTION
- Buy-up Options: \$1,500 ANNUAL MAXIMUM, WAIVED WAITING PERIOD - PURCHASED BUY UP
- Group Effective Date: 03/01/2011

**Subscribers**  
Click on the + to view a subscriber's dependents

**(1)** Add Subscriber **(A)** Print Member List

Last Name	First Name	Member ID	Date of Birth	Status	Coverage Effective Date	Coverage End Date	Action
SAMPLE	JOE	00098659	09/06/1982	ACTIVE	04/01/2011		<b>(3)</b> Edit <b>(2)</b> View Add Dependent Term
<b>(6, 7, 8)</b> +	SAMPLE	JOEY	03/03/1975	ACTIVE	04/01/2011		<b>(4)</b> Edit <b>(5)</b> View Add Dependent Term
	SAMPLE	JANE	06/01/1975	ACTIVE	04/01/2011		Edit View Add Dependent Term
	SAMPLE	JANEY	07/21/1972	ACTIVE	04/01/2011		Edit View Add Dependent Term

On the top left of the group's page you will see the group's plan design information including, group number, group name, the plan the group is enrolled in, buy up options the group has purchased and the effective date of the group.

There are 5 administrative actions you can take from this page.

- A. Print Member Listing
- B. View Transaction History
- C. Update OMM password as well as security questions using "My Account"
- D. Get the Group/Broker Service phone number and email address by clicking "Contact Us"
- E. Log out of the OMM Tool.

On the bottom half of the screen you will see all of the group's members listed and sorted by status and then alphabetically by last name.

From this screen there are 8 member related actions you can take found in the "Action" column at the right of the member list or buttons above it.

1. Add a new subscriber.
2. View an existing subscriber
3. Edit an existing subscriber
4. Add a dependent to an existing subscriber
5. Terminate an existing subscriber
- 6-8. Edit, Terminate or View an existing dependent. (Click on the plus sign to the left of the subscriber's name and the subscriber's dependents will be listed directly below the subscriber's name. Each dependent will have links to edit, view and term.)

## Adding a Subscriber

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Transaction History My Account Contact Us Logout

**Group ID:** 008239  
**Group Name:** TEST GROUP  
**Group Plan:** PREFERRED SPECIALTY OPTION  
**Buy-up Options:** \$1,500 ANNUAL MAXIMUM, WAIVED WAITING PERIOD - PURCHASED BUY UP  
**Group Effective Date:** 03/01/2011  
[Subscribers / Dependents >> Add Subscriber](#)

### Add Subscriber

Name:      
\*First Middle \*Last Suffix

\*Date of Birth:  MM/DD/YYYY

\*Gender:

\*Social Security #:  XXX-XX-XXXX

Address:    
\*Line 1 Line 2

\*City \*State \*Postal Code

Phone:  -  -   -  -   
Home Work

E-mail:  XXXXX@XXX.XXX

\*Coverage Effective Date:  /01/  MM/DD/YYYY

After clicking on the “Add Subscriber” button (shown on page 6, numbered 1), you will be brought to the Add Subscriber page.

When adding a new subscriber you must fill out all required fields on the Add Subscriber page. An asterisk (\*) next to the field name indicates a field is required. If there is no asterisk, the field is not required.

- ▶ If you decide to cancel the transaction prior to clicking submit, click the “Cancel” button. This will bring you back to the group’s member listing page.
- ▶ To save the new subscriber, click the “Submit” button after all information has been entered.
  - This will save the new information and open a transaction confirmation page.
- ▶ The Transaction Confirmation page will include the group’s information, a confirmation number, the subscriber’s name and ID, the type of transaction that was made as well as some additional member information.

You can print the transaction confirmation for your records. A copy will also be saved to the group’s transaction history which is available to you by clicking the “Transaction History” link on the group’s member listing page. (Transaction History noted on page 13)

Please note that all current business rules are built into this page to ensure that accurate enrollments are entered. For example, effective dates are always the 1st of the month, so the 1st is already populated in the coverage effective date field. All enrollments must be effective within 60 days of the date you are performing the transaction, they system will edit for this rule.

## Viewing Member

Transaction History My Account Contact Us Logout

**Group ID:** 008239  
**Group Name:** TEST GROUP  
**Group Plan:** PREFERRED SPECIALTY OPTION  
**Buy-up Options:** \$1,500 ANNUAL MAXIMUM,WAIVED WAITING PERIOD - PURCHASED BUY UP  
**Group Effective Date:** 03/01/2011  
[Subscribers / Dependents](#) >> [View Subscriber](#)

### View Subscriber

Name:	<input type="text" value="JOE"/>	<input type="text"/>	<input type="text" value="SAMPLE"/>	<input type="text"/>
	<small>*First</small>	<small>Middle</small>	<small>*Last</small>	<small>Suffix</small>
*Date of Birth:	<input type="text" value="00/00/0000"/>	<input type="text" value="MM/DD/YYYY"/>		
*Gender:	<input type="text" value="Male"/>			
*Social Security #:	<input type="text" value="***-**-8888"/>	<input type="text" value="xxx-xx-xxxx"/>		
Address:	<input type="text" value="123 MY STREET"/>	<input type="text"/>		
	<small>*Line 1</small>	<small>Line 2</small>		
	<input type="text" value="CITY"/>	<input type="text" value="STATE"/>	<input type="text" value="00000"/>	
	<small>*City</small>	<small>*State</small>	<small>*Postal Code</small>	
Phone:	<input type="text"/>	-	<input type="text"/>	-
	<small>Home</small>		<small>Work</small>	
E-mail:	<input type="text" value="xxxxx@xxx.xxx"/>			
*Coverage Effective Date:	<input type="text" value="00"/>	/	<input type="text" value="01"/>	/
	<input type="text" value="0000"/>		<input type="text" value="MM/DD/YYYY"/>	

After clicking the “View” link in the action column (shown on page 6, numbered 2), you will be brought to a “View Subscriber” or “View Dependent” page. (To get a list of dependents with actions available, click on the plus sign next to the subscriber’s name. This will list all dependents under the subscriber.)

This page will allow you to review the subscriber’s or dependent’s information. Changes are not allowed on this page; it is for viewing only.

To return to the group’s member list click the “Cancel” button on the bottom of the page.

## Editing Members

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Transaction History My Account Contact Us Logout

**Group ID:** 008239  
**Group Name:** TEST GROUP  
**Group Plan:** PREFERRED SPECIALTY OPTION  
**Buy-up Options:** \$1,500 ANNUAL MAXIMUM, WAIVED WAITING PERIOD - PURCHASED BUY UP  
**Group Effective Date:** 03/01/2011  
[Subscribers / Dependents](#) >> [Edit Subscriber](#)

### Edit Subscriber

Name:      
\*First Middle \*Last Suffix

\*Date of Birth:

\*Gender:

\*Social Security #:

Address:    
\*Line 1 Line 2

\*City \*State \*Postal Code

Phone:  -  -   -  -   
Home Work

E-mail:

\*Coverage Effective Date:  /  /

After clicking the “Edit” link in the action column for the member you wish to make edits to, the Edit Subscriber or Edit Dependent page will open based on whom you picked to edit. (To get a list of dependents with actions available, click on the plus sign next to the subscriber’s name. This will list all dependents under the subscriber.)

- ▶ You can make edits to your member’s name, address, phone number and email address or relationship to subscriber.
- ▶ If there is a change that you would like to make that the system will not allow, please call group services at 888-200-1154.
- ▶ If you would like to cancel the transaction prior to clicking submit, you can click the “Cancel” button. This will bring you back to the group’s member listing page.
- ▶ To save your changes, click the “Submit” button.
- ▶ This will save the changes and open a transaction confirmation page. The Transaction Confirmation page will include the group’s information, a confirmation number, the member’s name and ID, the type of transaction that was made as well as some additional member information.
- ▶ You can print the transaction confirmation for your records. A copy will also be saved to the group’s transaction history which is available to you by clicking the “Transaction History” link on the group’s member listing page.

## Adding a Dependent

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Transaction History My Account Contact Us Logout

**Group ID:** 008239  
**Group Name:** TEST GROUP  
**Group Plan:** PREFERRED SPECIALTY OPTION  
**Buy-up Options:** \$1,500 ANNUAL MAXIMUM, WAIVED WAITING PERIOD - PURCHASED BUY UP  
**Group Effective Date:** 03/01/2011  
[Subscribers / Dependents](#) >> [Add Dependent](#)

### Add Dependent

Subscriber Name: Joe Sample

Name:      
\*First Middle \*Last Suffix

\*Date of Birth:  MM/DD/YYYY

\*Gender:

Social Security #:  XXX-XX-XXXX

\*Relationship to Subscriber:

\*Coverage Effective Date:  /01/  MM/YYYY

After clicking the “Add Dependent” link, the Add Dependent page will open.

- ▶ You should first make sure that the subscriber listed is the subscriber that you want to add a dependent for.
- ▶ After confirming that you are working on the correct subscriber record, enter all required fields for the dependent that you are adding (required fields are marked with an asterisk).
- ▶ If you would like to cancel the transaction prior to clicking submit, you can click the “Cancel” button. This will bring you back to the group’s member listing page.
- ▶ To save your dependent, click the “Submit” button.
- ▶ This will save the dependent information and open a transaction confirmation page. The Transaction Confirmation page will include the group’s information, a confirmation number, the new dependent’s name and ID, the type of transaction that was made as well as some additional member information.
- ▶ You can print the transaction confirmation for your records. A copy will also be saved to the group’s transaction history which is available to you by clicking the “Transaction History” link on the group’s member listing page.

## Terminating Members

**OXFORD**  
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Transaction History My Account Contact Us Logout

**Group ID:** 008239  
**Group Name:** TEST GROUP  
**Group Plan:** PREFERRED SPECIALTY OPTION  
**Buy-up Options:** \$1,500 ANNUAL MAXIMUM, WAIVED WAITING PERIOD - PURCHASED BUY UP  
**Group Effective Date:** 03/01/2011  
[Subscribers / Dependents >>](#) Term Subscriber

**Term Subscriber**

Name:     
\*First Middle \*Last

\*Date of Birth:

\*Gender:

\*Social Security #:

\*Coverage Effective Date:  /  /

\*Coverage Term Date:  /  MM/YYYY  
*Termination of coverage will take place on the last day of month specified*

After clicking the “Term” link in the action column for the member you wish to terminate (shown on page 6, numbered 5), the Term Subscriber or Term Dependent page will open based on whom you picked to terminate. (To get a list of dependents with actions available, click on the plus sign next to the subscriber’s name. This will list all dependents under the subscriber.)

- ▶ The only fields available for update in these screens are the termination month and year. Please note that all terminations are made on the last date of the month requested. All applicable business rules have been built into the system to ensure accurate terminations.
- ▶ Terminating the subscriber will cause all active dependents under that subscriber to term for the same date as the subscriber.
- ▶ If you decide not to terminate the member before submitting it you can click the “Cancel” button. This will bring you back to the group’s member listing page.
- ▶ To terminate the member, click the “Submit” button.
- ▶ This will terminate the member and open a transaction confirmation page. The Transaction Confirmation page will include the group’s information, a confirmation number, the terminated subscriber’s name and ID, the type of transaction that was made as well as some additional member information.
- ▶ You can print the transaction confirmation for your records. A copy will also be saved to the group’s transaction history which is available to you by clicking the “Transaction History” link on the group’s member listing page.

## Member Listings

**OXFORD**  
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My Account Contact Us Logout

**Group ID:** 008239  
**Group Name:** TEST GROUP  
**Group Plan:** PREFERRED SPECIALTY OPTION  
**Buy-up Options:** \$1,500 ANNUAL MAXIMUM, WAIVED WAITING PERIOD - PURCHASED BUY UP  
**Group Effective Date:** 03/01/2011

[Subscribers / Dependents >> Print Member List](#)

**Print Member List**

\*Filter As Of:   
MM/DD/YYYY

①                      ②

This functionality allows you to obtain a listing of a group's subscribers or subscribers and dependents (Members). After clicking on the "Print Member List" button you will be brought to the filter page. You will be asked to enter a filter date. Only the people active with the group policy on the filter date will appear in your listing.

For example; Printing the Member list for a 4 life group with one member terminating as of 3/31/2011 and another 5 enrolling as of 5/1/2011 using 4/1/2011 as the filter date to run the listing. Only the members active on 4/1/2011 will be shown on the listing (3 subscribers and their dependents, if applicable).

There are two different listings that you can run.

1. **Subscriber List** – This will show only the subscribers that are effective on the filter date entered.
2. **Member List** – This will show all subscribers and dependents that are effective on the filter date entered.

Both listings will be opened in Adobe Acrobat and will show the name and effective date of all on the listing.

The subscriber listing will show which tier each employee is subscribed in (Employee Only, Family, etc...). The member listing will show each dependent's relationship to the subscriber.

Both listings will show a total number of subscribers or members by tier and the overall total.

## Transaction History

My Account Contact Us Logout

**Group ID:** 008239  
**Group Name:** TEST GROUP  
**Group Plan:** PREFERRED SPECIALTY OPTION  
**Buy-up Options:** \$1,500 ANNUAL MAXIMUM,WAIVED WAITING PERIOD - PURCHASED BUY UP  
**Group Effective Date:** 03/01/2011

[Subscribers / Dependents](#) >> Transaction History

### Transaction History

Date of Transaction	Administrator	Confirmation Number	Transaction Type
04/13/2011 12:15PM	Joe Sample	00000382	ADD SUBSCRIBER
04/13/2011 12:13PM	Joe Sample	00000381	ADD SUBSCRIBER
04/13/2011 12:11PM	Joe Sample	00000380	ADD SUBSCRIBER
04/13/2011 12:10PM	Joe Sample	00000379	ADD DEPENDENT
04/13/2011 12:09PM	Joe Sample	00000378	ADD DEPENDENT
04/13/2011 12:08PM	Joe Sample	00000377	ADD SUBSCRIBER

With Online Member Maintenance, you will have the ability to track all changes made online with through Transaction History. This feature will display a running list of all transactions that took place in the tool and who performed the transaction (either broker or benefit administrator) in the “Administrator” column. The list will also contain links to the specific transaction confirmation pages for each transaction by clicking on the Confirmation Number. You also have the ability to print the list for your records by clicking the Print button.

**Should you have any questions on the transactions that you are performing, or should the tool give you any issues, please call our Group Service Department at: 1-888-200-1154.**



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UnitedHealthcare Vision® coverage provided by or through UnitedHealthcare Insurance Company or its affiliates. Administrative services provided by Spectera, Inc., United HealthCare Services, Inc. or their affiliates.

UnitedHealthcare Life and Disability products are provided by UnitedHealthcare Insurance Company and Unimerica Insurance Company; Unimerica Life Insurance Company of New York (NYC); and in California, Unimerica Life Insurance Company.

Specialty Benefit Solutions packages are not available in all states and state-specific requirements may cause limitations or variations to the plans.

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