eServices Quick Hints Guide

A guide to navigating HM Insurance Group's eServices platform

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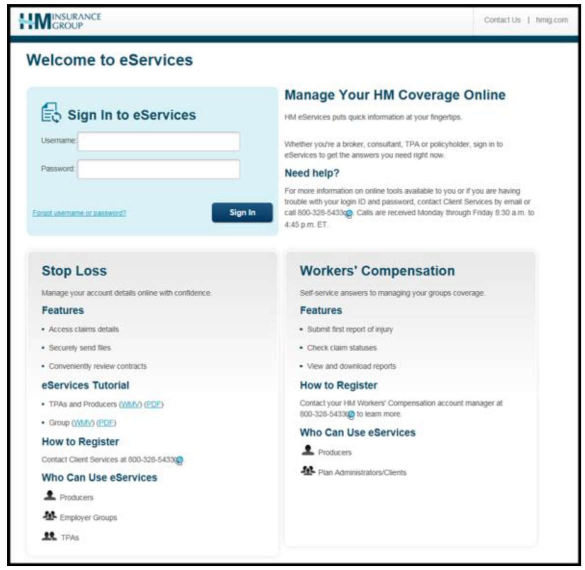
SIGN-IN TO eSERVICES



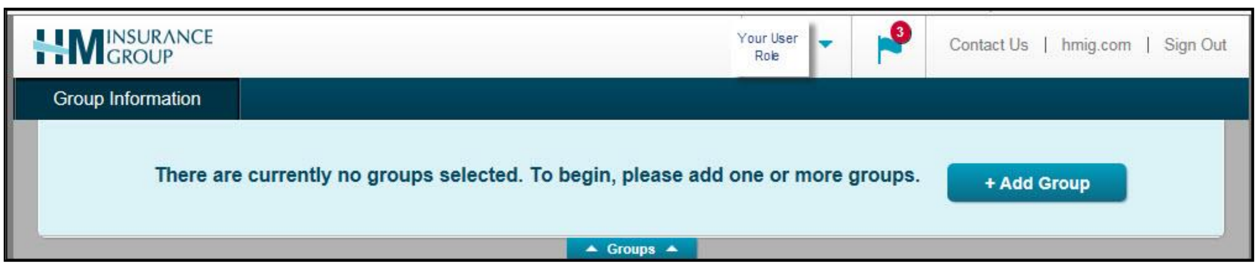
– Go to **www.hmig.com/eservices**
– Enter your **Username** and **Password;** select **Sign In**.

Tips

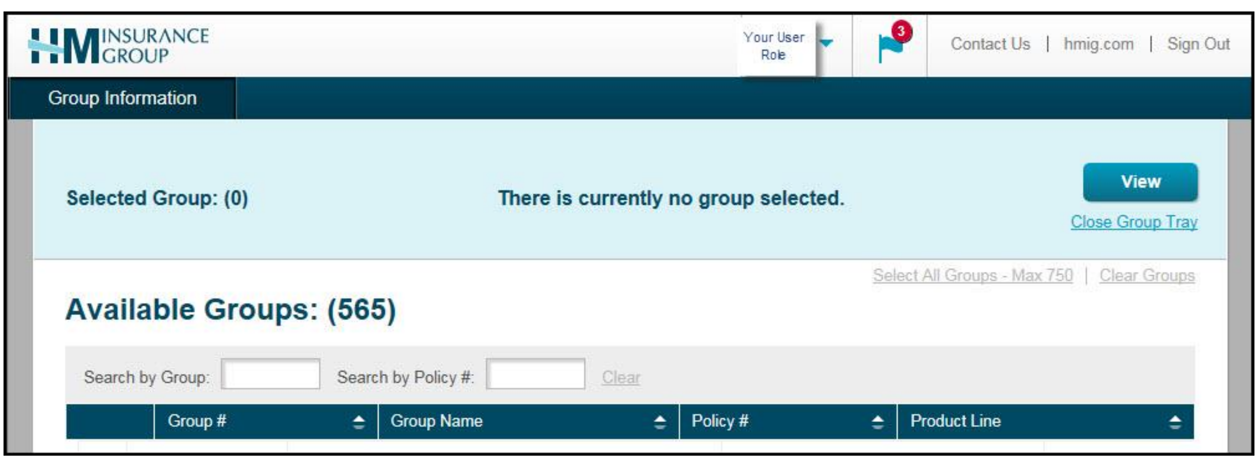
- eServices is accessible from your desktop, tablet or mobile device in Chrome, Firefox or Internet Explorer 10 and above; and Safari from mobile devices only. Some display errors may occur with older mobile devices.
- If you forgot your username or password, click the **Forgot username or password?** link and enter the required information.
- Click on the words underlined in blue throughout the entire site for additional definitions and information.

ADD GROUP(S)

This screen will only appear for users who have access to more than one group in the eServices application.



– Click **+Add Group** to access the Group Tray.
– All groups that you have access to will display as available for selection.
– Search for your desired group by entering the group's name in the **Search by Group** box, or by entering the policy number in the **Search by Policy #** box.



– To select a group, click anywhere on the appropriate line of the group that you wish to view.
  - You also may select multiple groups and view information simultaneously.

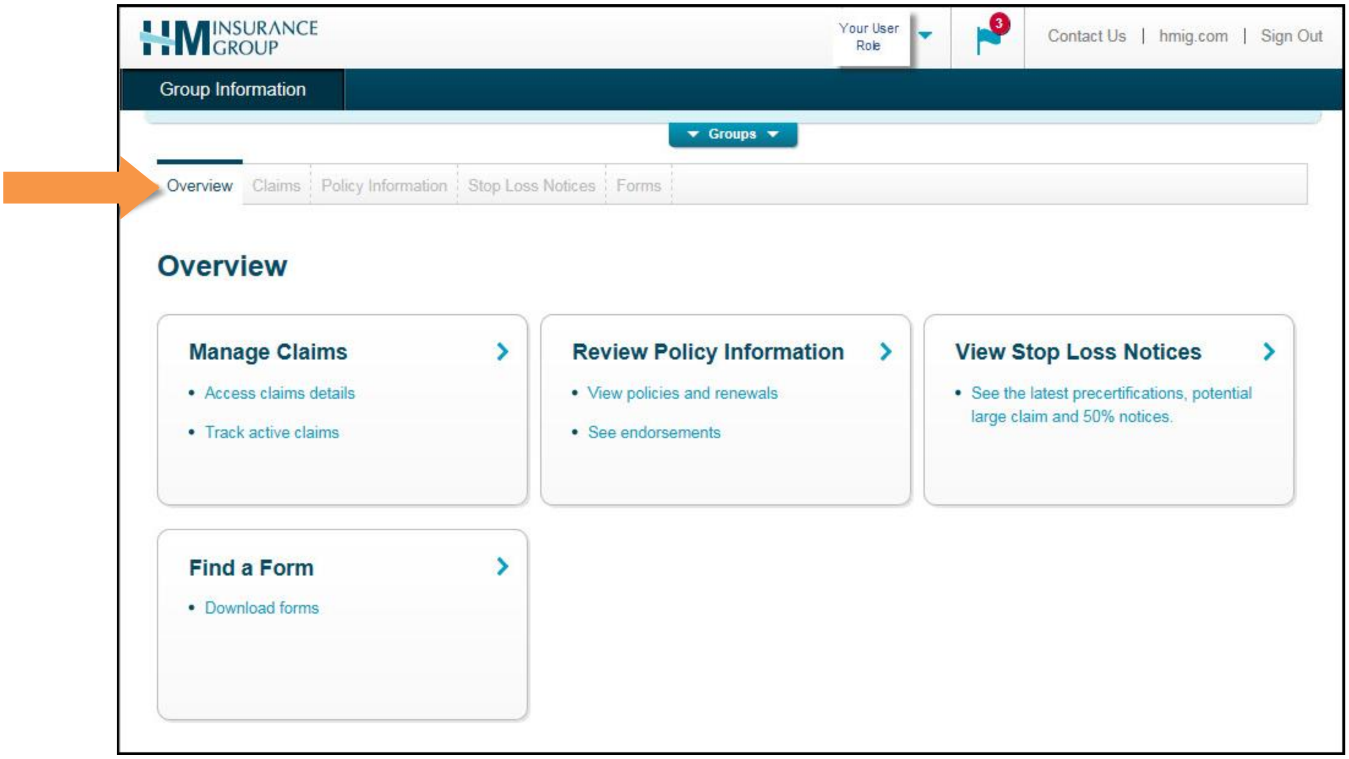
– Click **View** or **Close Group Tray** in the upper right hand corner to fully view the Group Information Overview page.

Tips

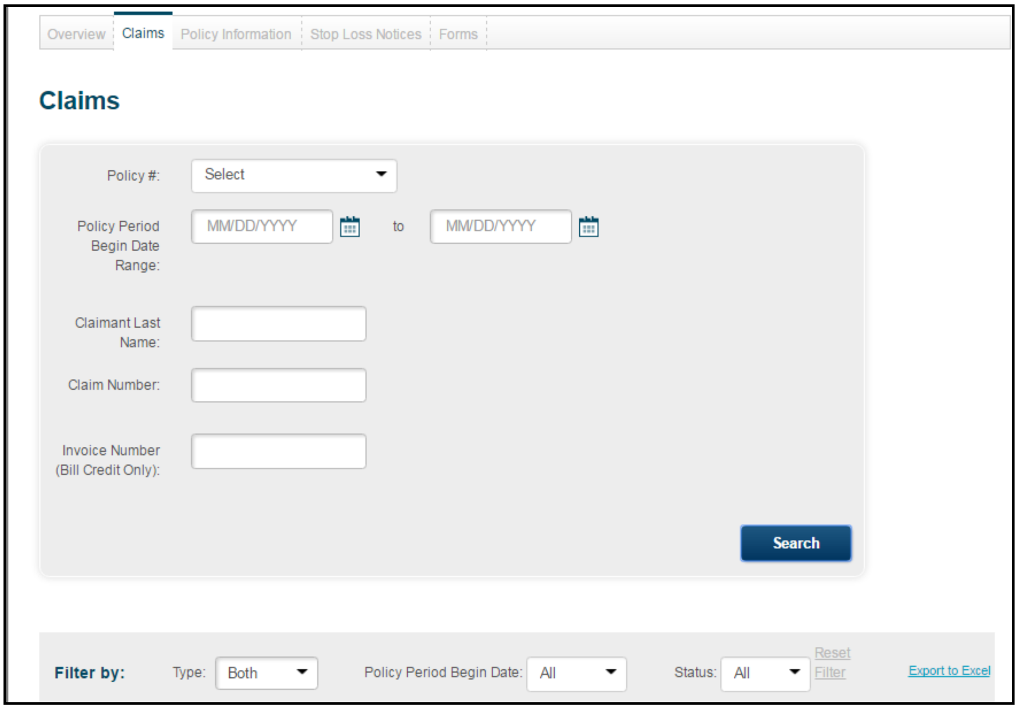
- To clear all selected groups from the Group Tray, click **View** to re-expand the full list of selectable groups, then click **Clear Groups**
- To clear one group, select the **X** next to the group's name from the Group Tray.

GROUP INFORMATION

The Group Information Overview page will display the options available to you. To make a selection, click on the appropriate panel or the tabs located at the top of the page. Note that the tabs will remain available for selection as you navigate throughout the site; the panels are only available for selection on the Group Information Overview page.



- **MANAGE CLAIMS**
  *To access claim details, select the **Manage Claims** panel or **Claims** tab.*



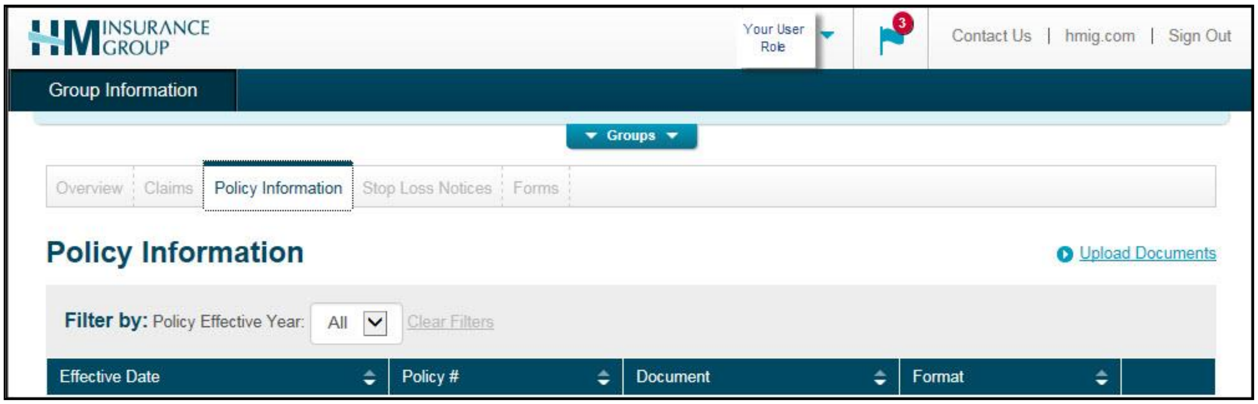
- You have the option to search by **Policy #**, **Claimant Last Name**, **Claim Number** or **Invoice Number (Bill Credit Only)**.
  - Select **Search**.
- Export all claims, or just one claim, to Microsoft Excel by clicking **Export to Excel,** or
- Filter the claims by:
  - Type
    - Spec
    - Agg
    - Both (Aggregate and Spec)
  - Policy period begin date
  - Claim Status Definitions:
    - **Active**: The payment request is received but not yet finalized.
    - **Approved**: The payment request is finalized and payment is in the process of being issued.
    - **Awaiting Approval**: The payment request has completed one or more steps and requires higher level authorization/review.
    - **Canceled**: The payment request has been closed because the information previously requested was not received within 90 days.
    - **Complete**: The payment request is finalized and no payment is due.
    - **Denied**: The payment request has been denied.
    - **Paid**: The payment request is finalized and payment has been issued.
    - **Pending**: The payment request is on hold until sufficient data exists for a claim determination. Click the Tool Tip for the Pend Code.
    - **Void**: The payment was voided.

– Click anywhere on the line of the claim that you want to view for more information.
– A **View Details** link will display in expanded view for payment requests in **Paid** status; click the link for more payment details.
  - You can export the 'View Details' document to a PDF by clicking **Export to PDF**.

Tips

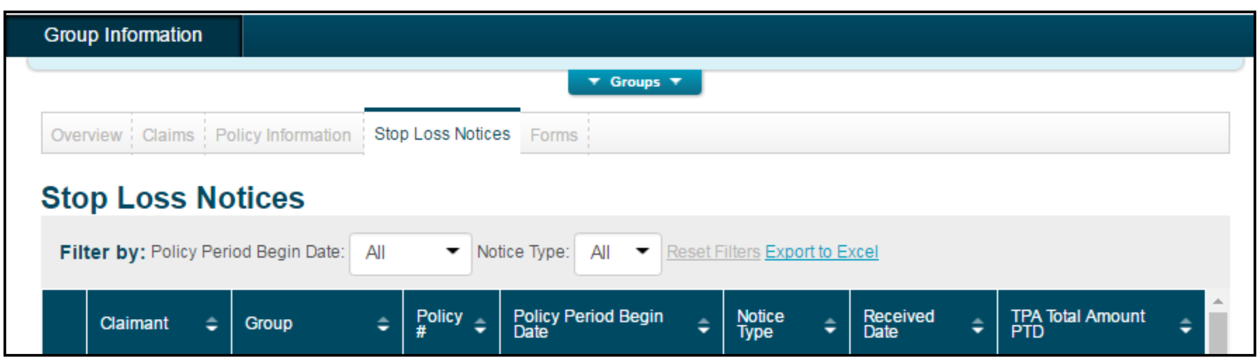
- If claims do not exist, the screen will display 'Nothing Found to Display'.
- The up and down arrows included in each column heading allow users to sort the details displayed on the screen.
- The **Requested Amount** for each claim is net of the Spec deductible.

- **REVIEW POLICY INFORMATION**
  To view Stop Loss policies, select the ***Review Policy Information*** *panel or* ***Policy Information*** *tab.*



– Filter the policies by effective year or group.
– Click on the link under the Document column to view the policy.

- **VIEW STOP LOSS NOTICES**
  *To see the latest pre-certifications, potential large claim and 50% notices, s*elect the **View Stop Loss Notices** panel or **Stop Loss Notices** tab.



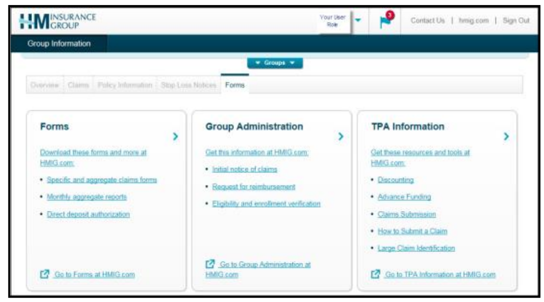
– Filter the notices by **Policy Period Begin Date** or **Notice Type**.

- Notice Type Definitions:
  - **C (Claim)**: An initial notice with an actual claim.
  - **N (50% Notice)**: A notice that indicates paid and/or pended claim amounts that have reached 50% or more.
  - **P (Potential Large Claim)**: A notice containing a diagnosis code that typically generates high dollar claims.
  - **PR (Pre-Certification)**: A notice indicating that a procedure or hospital admission was pre-certified and may reach 50% of the deductible.

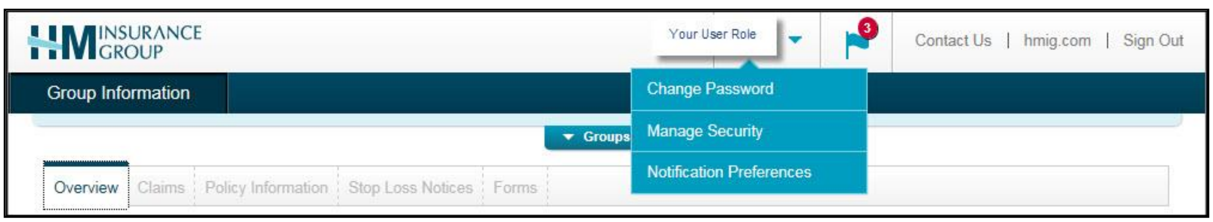
– Click on the blue box to the left of a notice to view the details.

- **FIND A FORM**

– Access or download Stop Loss and administrative information.



PERSONAL SETTINGS



- **CHANGE PASSWORD**

– Select **Change Password**.

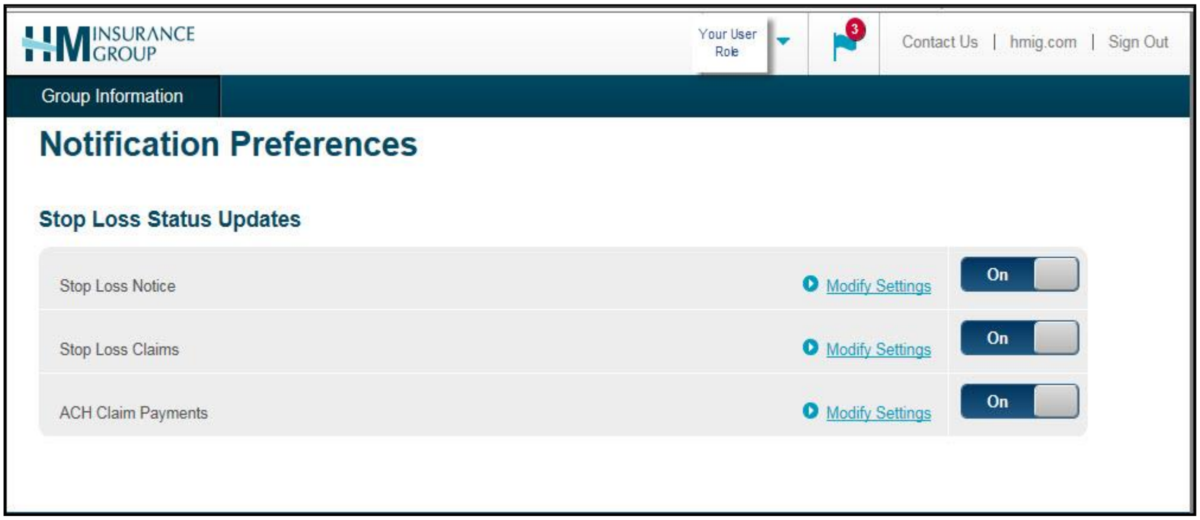
– Enter the required information and click **Change Password**.

- **MANAGE SECURITY**

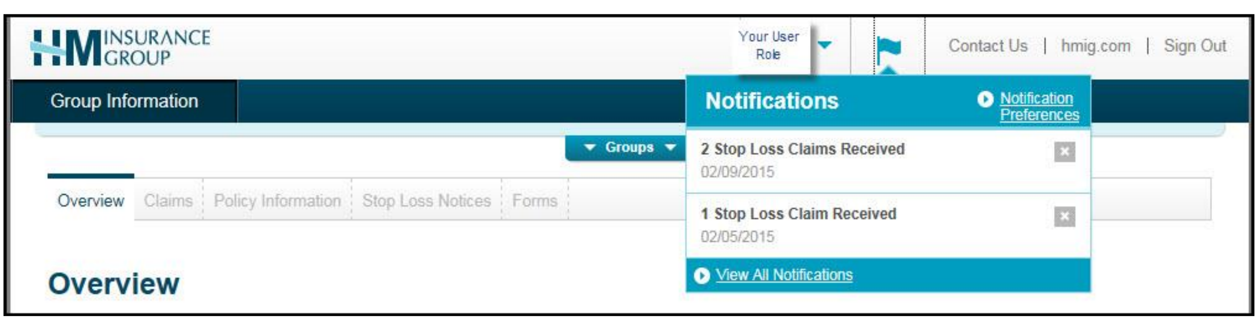
– Create a unique security question and answer that will be used if you forget your username or password.

– Enter the required information and click **Update Security**.

- **NOTIFICATION PREFERENCES**



– Activate notifications by group for Stop Loss Notice, Stop Loss Claims and ACH Claim Payment actions by moving the bar from the **Off** to the **On** position.
  - The screen will expand with additional options for that specific notification type.
  - Set the delivery frequency for that specific notification type to one of the following options (for users with access to multiple groups, it must be the same for all groups):
    - **When it happens**: Notifications will be generated immediately when the requested action occurs in our claim system and will be provided using the delivery method selected.
    - **Daily**: Notifications will be generated at the end of the day and will be provided using the delivery method selected.
    - **Weekly**: Notifications will be generated at the end of the week and will be provided using the delivery method selected.
    - **Monthly**: Notifications will be generated on the last day of the month and will be provided using the delivery method selected.
  - Choose the delivery method for each group:
    - To select a delivery method by group, check the gray box on the left and then select the delivery option from the drop down menu on the right.
    - To select the same delivery method for all groups, click the gray check mark in the blue header row and then select the delivery frequency method from the drop down menu in the blue header row.
    - Click **Submit**.



– If you have selected to receive notifications within the eServices application, the number of new notifications will be displayed in a red circle by the blue flag at the top of the Home page.
  - Click the blue flag to review summaries of your notifications.

- Deactivate notifications for **all** groups for Stop Loss Notice, Stop Loss Claims and ACH Claim Payment actions by moving the bar from the **On** to the **Off** position.
    - Click **Modify Settings** to change individual settings by group.

Questions?

Contact your HM Sales Representative or call 800-328-5433.
Calls are received Monday through Friday, 8:00 a.m. to 5:00 p.m., ET.

Coverage is underwritten by HM Life Insurance Company, Pittsburgh, PA, in all states except New York under policy form series HL601 or similar. In New York, coverage is underwritten by HM Life Insurance Company of New York, New York, NY, under policy form series HL601 or similar. In Pennsylvania, coverage may be underwritten by Highmark Casualty Insurance Company under policy form series HC601 or similar. The coverage requested may not be available in all states.