



Online Account Administrator

Quick Reference Guide

**Adding and modifying users
in Employer OnLine is easy**

Follow these simple steps

UPMC HEALTH PLAN

Online account administrator

If you are your company's primary contact for group plan administration, you are the online account administrator (OAA). As an OAA, you control who in your company can access Employer OnLine and their user-specific permissions. You also have full access to the Enrollment, Billing, Reporting, and Our Products resource tabs.

The OAA's responsibilities include:

- Setting up new users through the *Manage Portal Logins* page.
- Deactivating users through the *Manage Portal Logins* page.
- Modifying existing users' permissions.
- Determining permissions for each user.
- Coordinating use of Employer OnLine with the account manager.

How to register for your Employer OnLine OAA account:

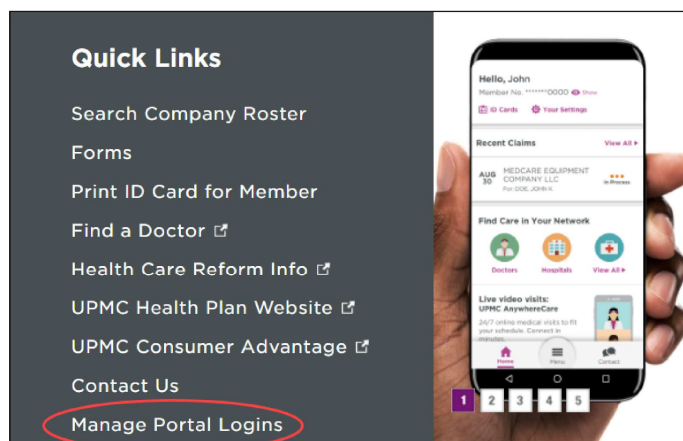
1. **Contact your account manager to request access to Employer OnLine.** Your account manager will send you an email with a request form.
2. **Complete the request form.** Once you have submitted the form and it has been approved, you will receive two emails. One will confirm your user ID. The other will contain your temporary password.
3. **Visit www.upmchealthplan.com and use your temporary password to log in to Employer OnLine.**
4. **Change your password.** Once you have logged in to Employer OnLine for the first time, change your password. Just follow the prompts.

If you already have an Employer OnLine account and should be your organization's OAA, contact your account manager or account service manager.

Creating a new user

1. Once you log in to Employer OnLine as the OAA, you can click on the **Manage Portal Logins** link under Quick Links.
2. To set up a new user, click on the link to **Add User(s) to Your Permission Group**.

NOTE: If your company is an existing group and you log in to Employer OnLine as the OAA for the first time, you will need to search for and add existing users to your grid. Otherwise, you will not be able to access the user's account from the **Manage Portal Logins** screen.



UPMC Health Plan's mobile app just got better

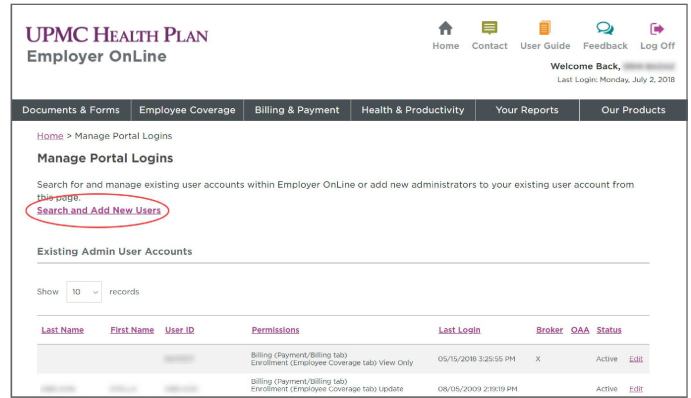
A newly redesigned homepage puts members' health information right at their fingertips.

View the latest flier: [Learn More](#)

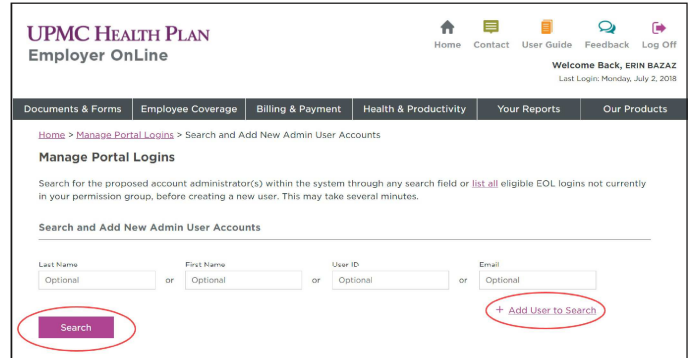
Documents & Forms | Employee Coverage | Billing & Payment | Health & Productivity | Your Reports | Our Products

3. To avoid having duplicate user accounts, search for existing users before adding new ones. Here is how:

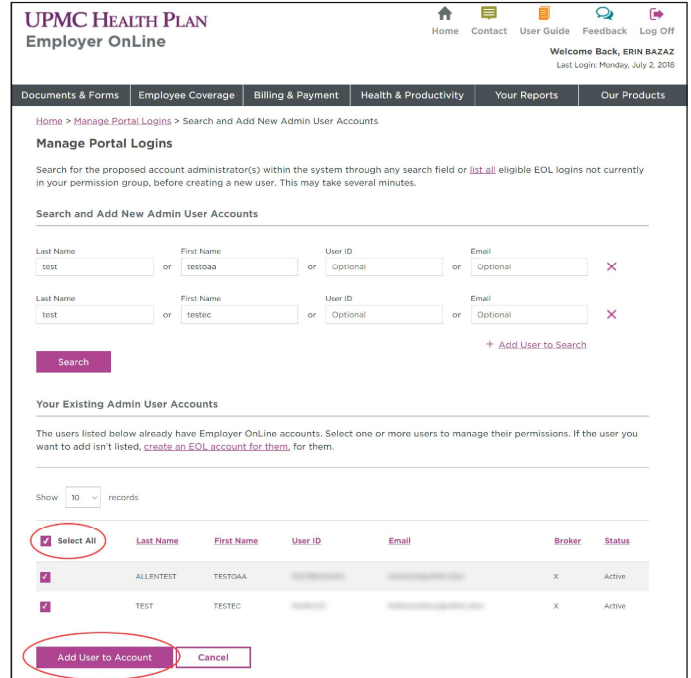
a. Click on **Search and Add New Users**



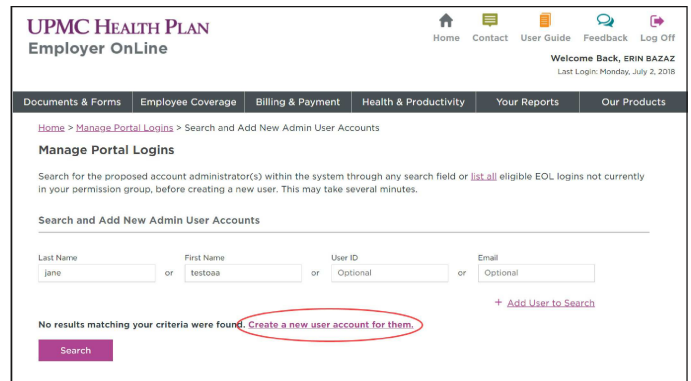
b. Search for the users you want to add to your company's account (your permission group). You can search for more than one user at a time by clicking **+Add User to Search**. Click on **Search**.



c. Click **the box next to specific users**, or you click the **Select All** box to choose all of the users on the page. Click **Add User to Account** at the bottom of the screen.



d. If the user you want to add does not appear in the search, click on **Create a new user account for them**.



NOTE: If required information is not included on the **User Account Online Request Page**, you will receive an error message indicating that there are errors on the page. Scroll through the form to view the error messages on the fields that need to be completed.

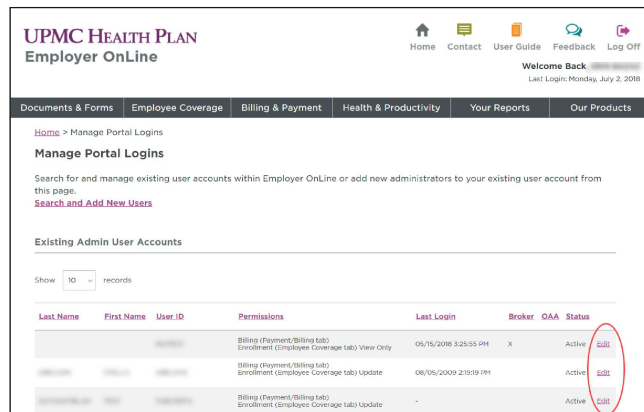
User Account Online Request Page

4. Fill out the form on the **User Account Online Request Page**.
 - a. Select the permissions the user needs. NOTE: If you would like more information on permissions, see page 6.
 - b. Select the groups and subgroups the user will need to access.
5. Click the **Submit** button. When you do, a temporary password will be generated for the new user. Only a password will be generated. As the OAA, you need to assign the user a user ID.
6. You will receive confirmation that a new user account has been created OR an error message indicating that information is missing. This information will appear on the screen.
7. If the new account is successfully created, the user will receive an email containing a user ID.
8. The user will receive a second email with a temporary password.

9. The user will log in to Employer OnLine with the user ID and temporary password.
10. The user will be prompted to change the password.
11. The user will accept the user agreement.
12. The user will be logged in to Employer OnLine and have access to the permissions that you assigned to them.

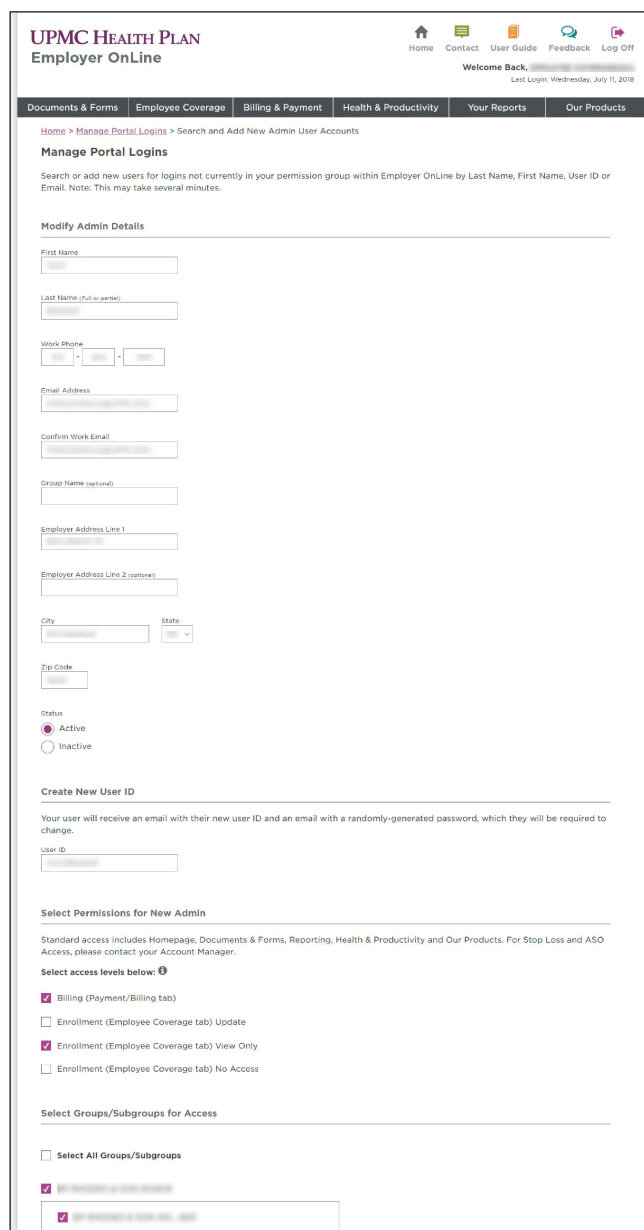
Modifying an existing user

1. On the **Manage Portal Logins** screen, click on **Edit** for a particular user.



User Account Online Request Page

2. You will be taken to the **User Account Online Request Page** to update the user's access permissions.
3. Here you can:
 - Deactivate users.
 - Reactivate users.
 - Update permissions.
 - Grant access to groups.
 - Grant access to subgroups.
 - Delete access to groups.
 - Delete access to subgroups.



Important information

There can only be one OAA per employer group. If the OAA changes at your company, please contact your account manager.

A broker cannot be your company's OAA; however, a broker can have Employer OnLine access. If your broker already has an Employer OnLine username, your OAA must add your broker's username to your company's permissions group. If your broker does not have an Employer OnLine account, your OAA can create one for your broker.

Brokers have full access to Employer OnLine tabs but they do not have access to the **Manage Portal Logins** screen.

For technical issues with your Employer OnLine account, contact your account manager.

Permissions information

Billing (Payment and Billing tab)

Providing access to this section allows the user to:

- View and pay premium invoices.
- View and pay administrative services only (ASO) claims invoices.
- View flexible spending account (FSA) claims invoices.
- View health reimbursement arrangement (HRA) claims invoices.

Enrollment (Employee Coverage tab), View Only Access

Give **view only access** to users who have permission to:

- Search and download your company roster.
- View member and plan details (contract information).

Enrollment (Employee Coverage tab), Update Access

Give **update access** to users who have permission to:

- View and update employee information.
- Order/Print ID cards.
- Modify coverage.
- Enroll new employees.
- Enroll new family members.
- Terminate/Reinstate coverage.
- View change history.
- Search and download your company roster.
- View member and plan details (contract information).

Notes



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