EPK Benefit's Portal User Guide

Logging In The First Time And Establishing Your Password

To access the portal go to www.epkbenefits.com select the appropriate trust then select EPK Benefits Online Portal. Log in using the user ID and temporary password provided to you in your welcome e-mail.   FOR OPTIMAL PERFORMANCE, PLEASE USE THE LATEST VERSION OF GOOGLE CHROME AS YOUR INTERNET BROWSER.

Welcome to the EPK & Assoc. online remittance processing system.
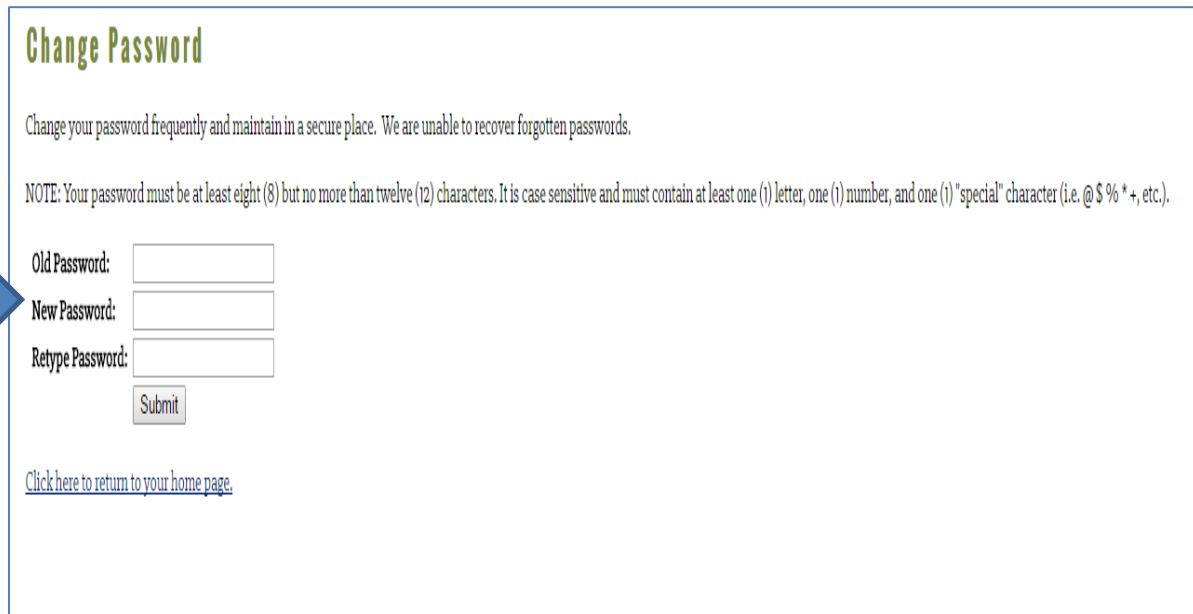
Please login below to access your account.

User Name: admin
Password: ·········

Login

For optimal performance, please use the latest version of Google Chrome or Internet Explorer.

Note- if you are having difficulty accessing the site, please ensure that your browser is not blocking pop-ups.

When you log in the first time you will be prompted answer a security question. The question is "What is your EIN Number? Once you accurately answer the security question, you will then be prompted to change your password.

Change Password

Change your password frequently and maintain in a secure place. We are unable to recover forgotten passwords.

NOTE: Your password must be at least eight (8) but no more than twelve (12) characters. It is case sensitive and must contain at least one (1) letter, one (1) number, and one (1) "special" character (i.e. @ $ % * +, etc.).

Old Password:

New Password:

Retype Password:

Submit

Click here to return to your home page.

Enter your temporary password, select a new password; then submit.

EPK Benefits will not have a record of this password, so please select something you will remember and keep it in a secure place.
Once you have reset your password, select home page. You are now ready to begin using the site.

Navigation Tips

- **Each time you login you will be required to agree to the usage terms and conditions. Agree to the terms of use by checking the box and selecting continue. You will then be routed to the main menu.**

Agree to Usage Guidelines

Please read the Usage Guidelines below carefully. By checking the box below, you are agreeing to these Usage Guidelines. If you do not agree to these Usage Guidelines, then you may not use this Portal.

Usage Guidelines for the Use of EPK Benefits Portal

You, the User, will not share, republish, or illegally disseminate any of the information contained on this site. You, the User, agree to the following:

1. **Compliance.** Use of this Portal will be in compliance with our Terms and Conditions, Privacy Policy, Frequently Asked Questions, these Usage Guidelines, and any other applicable policy, as well as all applicable laws. You will comply with the Health Insurance Portability and Accountability Act and its implementing regulations, better known as HIPAA, and other laws relating to protecting the confidentiality, privacy, and security of group health plan and employees' information.

2. **Protect Your Password.** You will take all reasonable measures to ensure the security of your log-in credentials for this Portal, including your username and password. For example, you will not tell anyone your log-in credentials or allow anyone else to use your log-in credentials. You will select credentials that cannot be easily guessed.

3. **Authorized Business Purposes Only.** You will not use the Portal to attempt to access information for which you have not been given prior approval to access. Access to and use of this Portal will be for authorized business only. You affirm that you have been authorized to access and use this Portal on behalf of your employer and its group health plan. You will not access or use this Portal for any unauthorized or personal purposes.

4. **No Unauthorized Access.** You will not permit any unauthorized person to access the Portal or to access information on the Portal. For example, you will not leave your monitor unattended when you are accessing the Portal or permit someone to view the information on the Portal that you are viewing (e.g., no shoulder surfing). You will not access the Portal in a public place.

5. **No Unlawful Purposes.** You may not use this Portal or the information collected on this Portal for any purpose that is unlawful, retaliatory, obscene, defamatory, libelous, threatening, pornographic, harassing, or encourages conduct that would be considered a criminal offense, give rise to civil liability, or violate any law.

☐ I agree to these Usage Guidelines

[Continue]

- **To navigate within the pages, use the Tab Key. Enter or return will not move you forward through fields.**

Establishing Banking Information and Making Payments

You now have the ability pay your bill on-line. In order to pay your bill, you must first establish banking information.

Main Menu | You are logged in as TEST CUSTOMER; Click here to logout.

What Do You Want To Do?

- Bills
- Change Employee Information
- View Current Active Roster
- View Current COBRA Roster
- Set Banking Information
- Change Password
- Important Documents
- Help Section

The following banking template will appear:

Update Banking Information

Please provide Bank account information in order to submit payments via ACH processing

Bank Transit Routing Number:

Type without dashes, spaces or alpha values. Your routing number is a nine digit numeric code.

Bank Account Number:

Your bank account number can be found after the routing number on a printed check.

Bank Name:

Please enter the name of your banking institution.

Submit

If you do not want to enter banking information, click here to return to your home page

Add your company's banking information and submit.

Once you have submitted your banking information, you will receive a confirmation that the information has been stored.

Viewing Bills and Making Payments

Once you have established your banking information, select Bills from the main menu.

Main Menu | You are logged in as TEST CUSTOMER; Click here to logout.

What Do You Want To Do?

- ⊕ Bills
- ⊕ Change Employee Information
- ❯ View Current Active Roster
- ❯ View Current COBRA Roster
- ❯ Set Banking Information
- ❯ Change Password
- ⊕ Important Documents
- ⊕ Help Section

If you have more than one group number, select the group you want to view/pay and select continue.

Main Menu | You are logged in as TEST CUSTOMER 3; Click here to logout.

Select the Group

- ⦿ 00066778 - TEST CUSTOMER 3
- ○ 00044556 - TEST CUSTOMER 3

[Continue]

Once selected, your can either View/Pay your current bill, or View Previous Bills. *Note- if you are having difficulty viewing the bill , please ensure that your browser is not blocking pop-ups.*

To view and pay your current bill, select View/Pay Current Bill. *Note that if you haven't set up your banking information you will only be able to "view your current bill".*

What Do You Want To Do?

- ➖ Bills
  - ➤ View / Pay Current Bill
  - ➤ View Previous Bills

View / Pay Current Bill(s)

Voucher Number: 72966

Check the appropriate box for the outstanding discrepancies you wish to pay. No partial payments are accepted; payments must be made in full

Show 10 ▼ entries   Search: [   ]

Click to Pay	View Bill PDF	Receipt Number	Bill Month	Balance	Amount Paid
☑	View Bill	72961	04/2016	$20,189.22	$20189.22
Total Amount:					$20,189.22

Showing 1 to 1 of 1 entries   Previous   1   Next

Payment Date: 04/14/2016

Submit Payment

Once you select view/pay current bill, your current balance due will display. This balance will include any adjustments since your last billing period   i.e. payments, deletions and additions of employees, as well as outstanding balances. <u>Please note- you must pay the current balance due.</u>

 If you wish to view your bill prior to paying, you may double click on the view bill line to the right of the checkbox.

When ready to pay, check the box to the left of the invoice, then select submit payment.

Payments will be posted on the date submitted. Once you submit the payment, you will receive the following confirmation:

Bill Pay Confirmation

You have submitted a payment of: $4,277.70

Voucher Number: 72920

Show 10 ▼ entries   Search: [   ]

Receipt Number	Bill Month	Balance
72917	04/2016	$4,277.70
Total Amount:		$4,277.70

Showing 1 to 1 of 1 entries   Previous   1   Next

Print this page

If you have multiple accounts, you may now select the next account and follow the same process for payment.

Viewing Previous Bills

You are also able to view your billing and payment history by selecting "View Previous Bills"

What Do You Want To Do?

⊖ Bills

❯ View / Pay Current Bill

❯ View Previous Bills

This page displays your billing and payment history. You may also view a PDF copy of the actual bill by selecting View Bill.

View Previous Bills

Show 10 ▼ entries   Search: _____

View Bill PDF	Receipt Number	Bill Month	Current Amount	Adjustments	Prior Balance	Total Due	Received Amount	Paid Date	Received Date	Balance
View Bill	72961	04/2016	$6,555.27	$0.00	$13,633.95	$20,189.22	$20,189.22	04/14/2016	04/14/2016	$0.00
	68177	01/2016	$0.00	$0.00	$494.30	$494.30	$494.30	01/13/2016	01/13/2016	$0.00
View Bill	66321	01/2016	$6,031.86	$0.00	$0.00	$6,031.86	$5,537.56	12/30/2015	12/30/2015	$494.30
View Bill	64227	12/2015	$5,537.56	$0.00	$0.00	$5,537.56	$5,537.56	12/08/2015	12/08/2015	$0.00
View Bill	62236	11/2015	$5,537.56	$0.00	$0.00	$5,537.56	$5,537.56	10/29/2015	10/29/2015	$0.00
View Bill	60243	10/2015	$5,537.56	$0.00	$0.00	$5,537.56	$5,537.56	09/24/2015	09/24/2015	$0.00
View Bill	58123	09/2015	$5,537.56	$0.00	$0.00	$5,537.56	$5,537.56	08/26/2015	08/26/2015	$0.00
View Bill	56113	08/2015	$5,537.56	$0.00	$0.00	$5,537.56	$5,537.56	07/29/2015	07/29/2015	$0.00
View Bill	54197	07/2015	$5,537.56	$0.00	$0.00	$5,537.56	$5,537.56	06/30/2015	06/30/2015	$0.00
View Bill	52294	06/2015	$5,537.56	$0.00	$0.00	$5,537.56	$5,537.56	05/26/2015	05/26/2015	$0.00

Showing 1 to 10 of 19 entries   Previous 1 2 Next

Print this page

Canceling An Employee's Coverage

If you wish to cancel coverage for an employee, select Change Employee Information

Main Menu | You are logged in as TEST CUSTOMER; Click here to logout.

What Do You Want To Do?

- ⊕ Bills

- ⊕ Change Employee Information

- ❯ View Current Active Roster

- ❯ View Current COBRA Roster

- ❯ Set Banking Information

- ❯ Change Password

- ⊕ Important Documents

- ⊕ Help Section

Then select Cancel an Existing Employee's Coverage

⊖ Change Employee Information

     ❯ Cancel an Existing Employee's Coverage

     ❯ View Submitted On-line Requests

Enter the social security number of the employee you wish to cancel and select search. The employee information will populate.

If the employee has both medical as well as dental/vision coverage under a separate group number, a message will appear displaying the information for both coverages. Please note that voluntary coverages, such as dental or vision, have an ID number that is different than the employee's social security number.

Select the coverage you wish to cancel by double clicking on it in the message box.

The following form will appear for completion:

Enter the last day worked, reduction in hours or waived, and the reason for the termination (from the drop down menu). The coverage cancellation date will then automatically populate.

Please note that due to health care reform, the insurance carriers require a change transmittal form be received by EPK & Associates within 10 days of the last date of coverage. Therefore if the request is received after the 10th of the month, coverage will be cancelled effective the 1st of the following month.

Enter your name at the bottom of the form and select submit form.

Once your request has been submitted you will receive a confirmation message.

THIS IS THE TEST WEBSITE

Main Menu | You are logged in as TEST CUSTOMER; Click here to logout.

Thank you.

Your changes have been submitted for review. EPK may contact you if there are any questions or issues regarding your form.

Click here to cancel coverage for another employee.

⚠ Reminder: Employers using online enrollment must still require and maintain enrollment forms to be completed and signed by all employees in the event of a Trust audit, or the need for beneficiary designation information.

If there is more than one coverage type for the employee, remember to also repeat the same cancellation process for the second coverage.

Once you have submitted your request to cancel, it will be routed to an EPK Administrator for approval and final submission.

Changing Employees Addresses

From the main menu select Change Employee Information. Next select Change An Existing Employees Address.

❯ Change an Existing Employee's Address

❯ Cancel an Existing Employee's Coverage

❯ View Submitted On-line Requests

Enter the social security number of the employee and select search and the following screen will appear:

Member Information

First Name | Middle Name | Last Name
KENSLEY | | CAMPBELL

Date of Birth
09/08/1977

Group Number
00014464 - EPK & ASSOCIATES, INC.

Address Line 1
12345 MAIN STREET
Address Line 2

City
COVINGTON

State
Washington

98042 - 0000
Zip Code   Zip Code Ext.

Telephone #
(253) 631-4072
Type the Telephone # without spaces or dashes

Comments

Include any comments related to this form submission.

This form is being submitted by

First Name | M.I. | Last Name

Submit Form   Reset Form

Type over the existing address, enter your name at the bottom of the form and select submit. If an employee has more than one coverage-i.e. medical and separate dental/vision coverage, please submit a change form for each coverage.

Viewing Submitted On-Line Requests

You will continue to receive a confirmation letter for any changes made to your enrollment. However, you can also now view the status of your submissions on-line. From the main menu, select Change Employee Information

Main Menu | You are logged in as TEST CUSTOMER; Click here to logout.
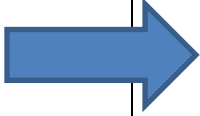
What Do You Want To Do?

⊕ Bills

⊕ Change Employee Information

❷ View Current Active Roster

❷ View Current COBRA Roster

❷ Set Banking Information

❷ Change Password

⊕ Important Documents

⊕ Help Section

Select View Submitted On-Line Requests

A listing of all your submitted requests and their status will display.

Main Menu | You are logged in as TEST CUSTOMER; Click here to logout.

Submitted Form History

Show 25 ▼ entries   Search: [   ]

Form Nbr ▼	Group #	Group Name	SSN	First Name	Last Name	Submit Date	Submit Time	Form Status
354	00000004	Test Customer	000-66-0000	MIKE	LEE	07/12/2016	16:14:55	APPROVED
322	00000004	Test Customer	222-34-5678	MADDIE	CAMPBELL	06/20/2016	08:51:10	PENDING
321	00000004	Test Customer	888-99-1010	TUCKER	CAMPBELL	06/20/2016	08:45:04	PENDING

Showing 1 to 3 of 3 entries   Previous | 1 | Next

Viewing Your Active Roster

This option gives you the ability to view employees , and their dependents who are actively enrolled in benefits. Any employee who has been enrolled for a future date will not appear on the roster until the date they become active.

To review your roster, select View Current Active Roster

Main Menu | You are logged in as TEST CUSTOMER;   Click here to logout.

What Do You Want To Do?

- ⊕ Bills
- ⊕ Change Employee Information
- ⊗ View Current Active Roster
- ⊗ View Current COBRA Roster
- ⊗ Set Banking Information
- ⊗ Change Password
- ⊕ Important Documents
- ⊕ Help Section

Once you select Roster the following view will appear:

Main Menu | You are logged in as TEST CUSTOMER;   Click here to logout.

Current Active Roster

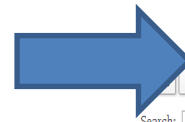**Thu Jun 16 2016**

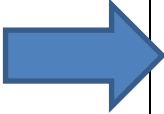**Viewing for Group: 00000004 - Test Customer**

CSV Excel PDF Print

Show 25 ▼ entries   Search:

	SSN	First Name	Last Name	Medical	Dental	Vision	EAP	BLIFE	SLIFE	SLIFE Amount	
⊖	000-66-0000	MIKE	LEE	G40						$0.00	
⊖	011-11-1111	SALLY	WHITE	G40						$0.00	
⊙	111-00-1212	JOE	SMITH	G40						$0.00	

Showing 1 to 3 of 3 entries   Previous 1 Next

The roster view shows actively enrolled employees and their coverage information.   You may also view enrolled dependents . If an employee has dependents enrolled in coverage, a green arrow will be displayed within the button on the left.

Simply click on the arrow and the dependents will appear below the employee information.
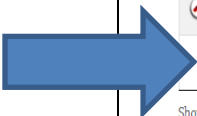
You can save this roster as an Excel or PDF document by selecting your preferred format and selecting save.
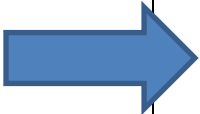
Viewing Your COBRA Roster

To view your current COBRA Roster, select View Current COBRA Roster

Main Menu | You are logged in as TEST CUSTOMER; Click here to logout.

What Do You Want To Do?

- ⊕ Bills
- ⊕ Change Employee Information
- ❯ View Current Active Roster
- ❯ View Current COBRA Roster
- ❯ Set Banking Information
- ❯ Change Password
- ⊕ Important Documents
- ⊕ Help Section

The roster will appear populated with any former employees who are enrolled in COBRA

Main Menu | You are logged in as TEST CUSTOMER; Click here to logout.

Current Cobra Roster

Wed Jul 13 2016

Viewing for Group: 00000004 - Test Customer

Copy | CSV | Excel | PDF | Print

Show 25 ▼ entries   Search: [   ]

▲ Case #	SSN	First Name	Last Name	Election Date	Start Date	End Date	Premium	Medical	Dental	Vision	EAP	BLIFE	SLIFE	SLIFE Amount
No data available in table													

Showing 0 to 0 of 0 entries   Previous   Next

Changing Your Password or Disabling Access

Main Menu | You are logged in as TEST CUSTOMER; Click here to logout.

What Do You Want To Do?

➕ Bills

➕ Change Employee Information

❯ View Current Active Roster

❯ View Current COBRA Roster

❯ Set Banking Information

❯ Change Password

➕ Important Documents

➕ Help Section

Follow the instructions on the screen

Main Menu | You are logged in as TEST CUSTOMER 2; Click here to logout.

Change Password

Change your password frequently and maintain in a secure place. We are unable to recover forgotten passwords.

NOTE: Your password must be at least eight (8) but no more than twelve (12) characters. It is case sensitive and must contain at least one (1) letter, one (1) number, and one (1) "special" character (i.e. @ $ % * +, etc.).

Old Password: [＿＿＿＿＿＿]
New Password: [＿＿＿＿＿＿]
Retype Password: [＿＿＿＿＿＿]
[Submit]

Click here to return to your home page.

To disable a user's access, please contact EPK benefits at (425)641-7762 or e-mail at support@epkbenefits.com

Important Documents

This section includes several documents for your reference:

- **Terms & Conditions**- this section provides you an additional copy of the terms and conditions for use of EPK Benefits On-Line Portal. You were provided a copy of this document for your review and acknowledgement when you registered for access to the site.

- **Privacy Policy**- this section provides you an additional copy of the EPK's Privacy Policy. You were provided a copy of this document for your review when you registered for access to the site.

- **Administrative Information & Policy Document**- this section provides you with high level policy information regarding the administration of your MBA insurance coverage.

Help Section

Included in this section are electronic versions of the on-line user guide as well as the most current MBA Administration Manuals.