Employer Portal How-To Guide

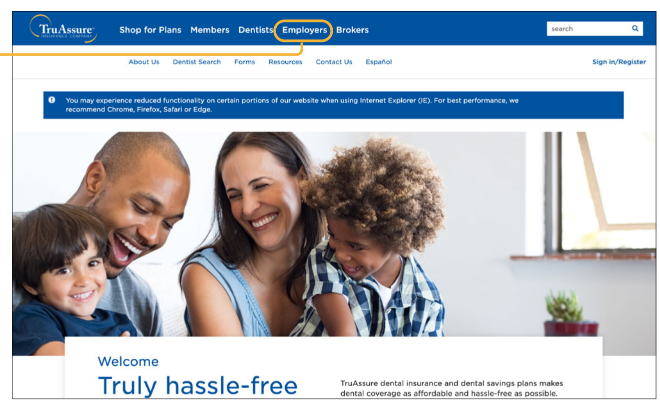
Truly easy online group administration.

At TruAssure, our services are better from the start because we provide technology solutions that make managing your group's dental plan easy and hassle-free. Our online employer portal allows your group to manage members, view bills, run reports, access forms and more. This user guide will lead you every step of the way from registering for an account to managing your group dental plan members.

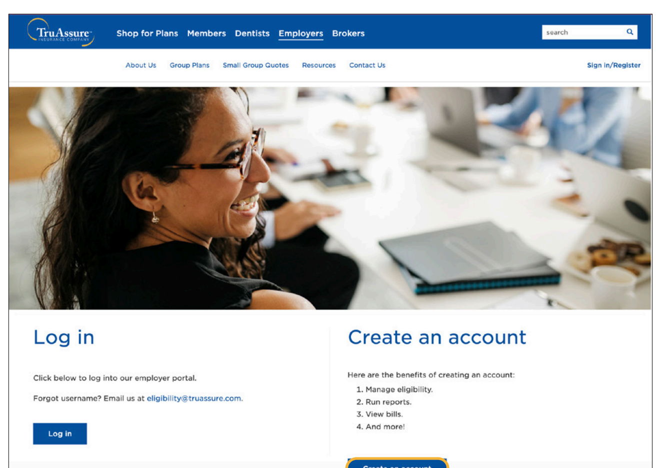
Register for an Account

If you are a new administrator or would like to approve additional user access, please follow the steps below to create an account.

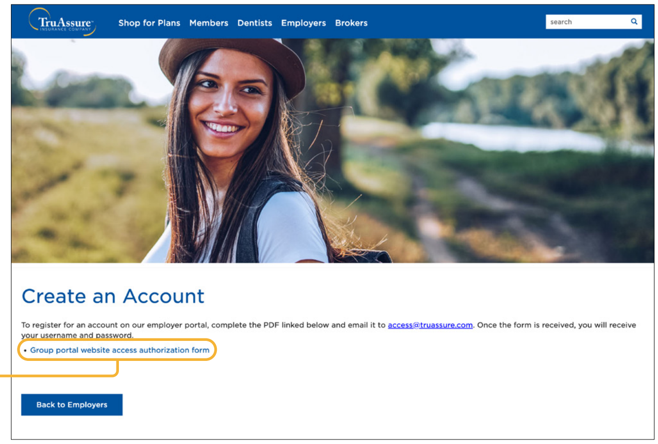
1. From **TruAssure.com**, click **Employers.**



2. On the Employers page, click **Create an account.**

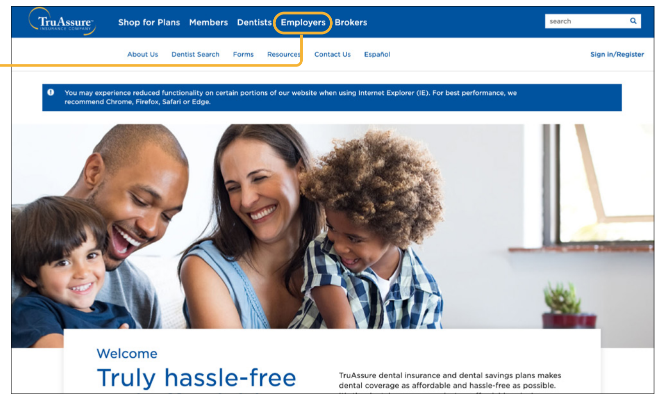


3 On the Create an Account page, download the “Group portal website access authorization form”, complete the form and email it to access@truassure.com. Please allow three business days for TruAssure to verify and validate your account information and grant you access. You will receive an email once access to your account has been granted with a username and password.

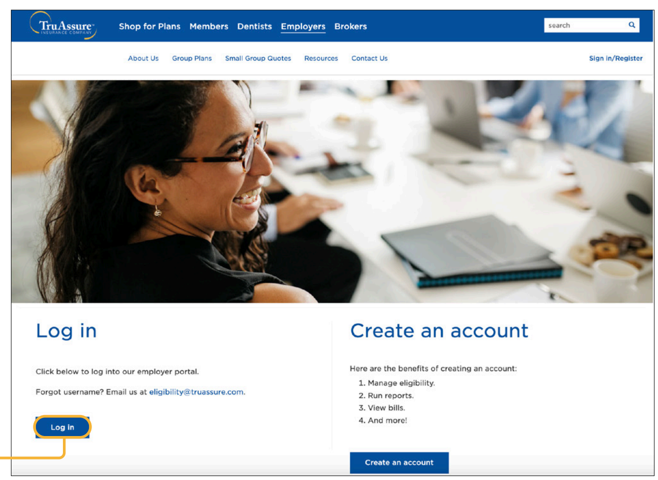


Accessing the Employer Portal

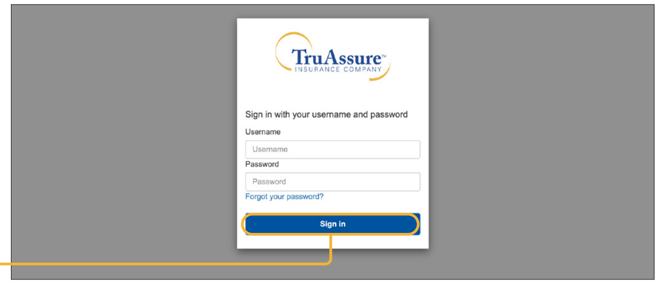
1 Go to TruAssure.com and click Employers.



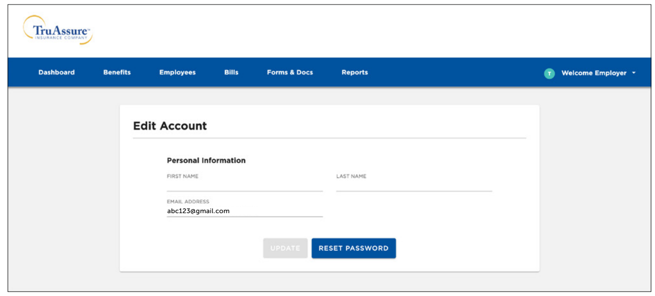
2 Click Log In. You will then be redirected to a login page.



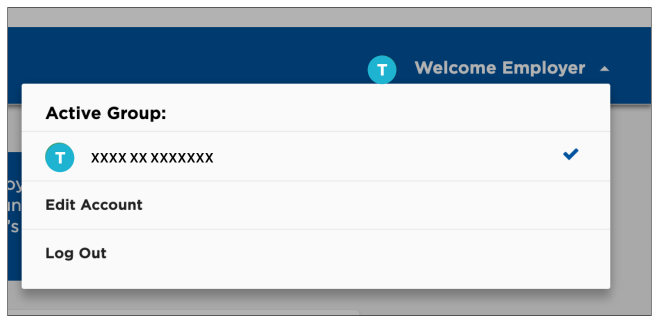
3 Enter your username and password and click **Sign In.**



4 You may change your password by clicking on the dropdown arrow next to your name and clicking **Edit Account.**



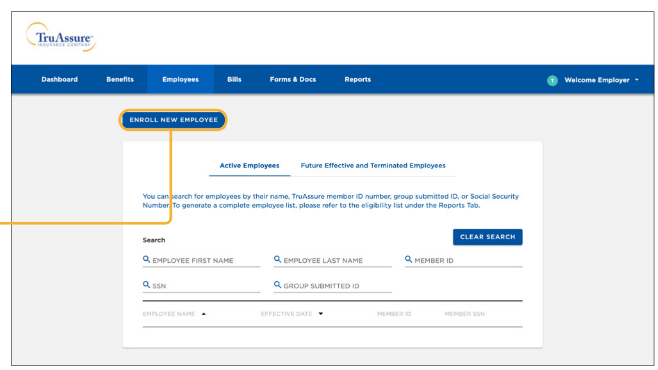
5 If you have access to more than one sub-account, you'll need to choose one.



Enroll a New Employee

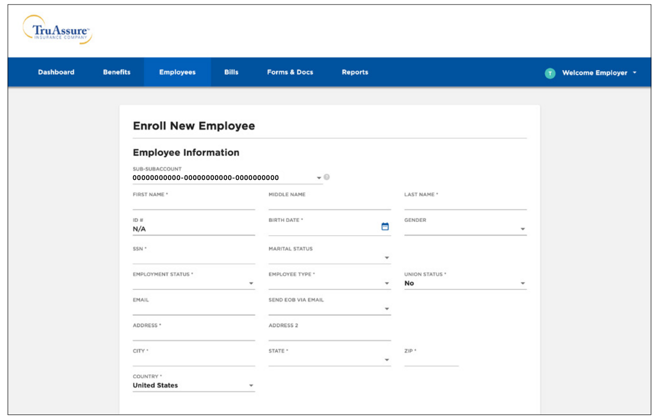
1 Prior to enrolling an employee, select the correct **sub-account** by clicking on the dropdown arrow next to your name in the top right corner.

2 Enroll new employees by entering their information on the **Enroll New Employee** section of your employer dashboard, or click **Employees** and click **Enroll New Employee.**



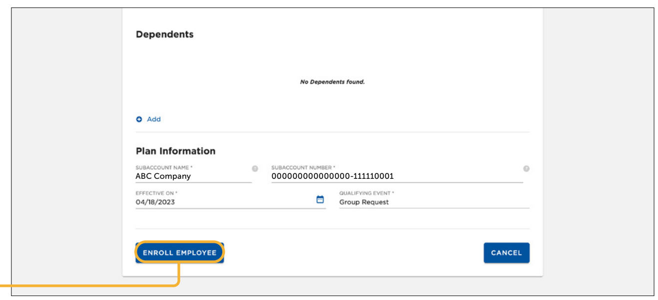
3 Select the **sub-subaccount** under which the new employee is being enrolled and complete the rest of the employee information section.

4 Complete the appropriate fields to enroll the employee in dental coverage. Fields marked with an asterisk are mandatory.



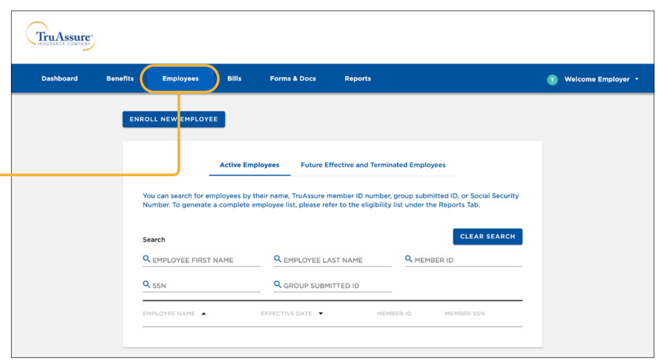
5 If the employee is eligible for dependent coverage, click **Add** under the Dependents section and complete the dependent information. To add additional dependents, click **Add** and fill in the information for each dependent. Check the appropriate box(es) to enroll the dependent in dental coverage.

6 Once you have entered all employee and dependent information, complete the plan information. Select the effective date for coverage and then click **Enroll Employee.**



Manage Employee Benefits

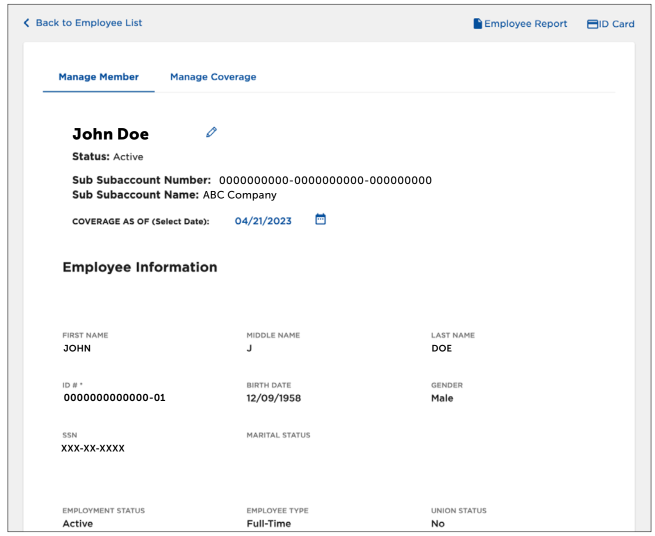
1 To edit an existing employee's dental coverage, click **Employees** and search active employees by entering the employee name, member ID and/or Social Security Number.



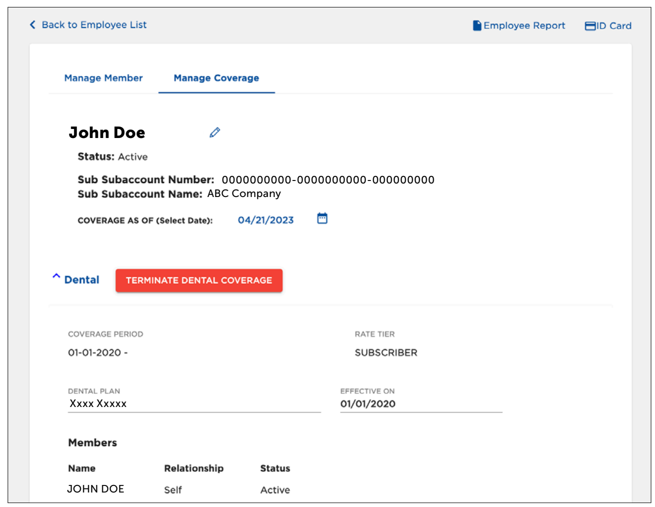
2 Click the employee's name and their benefits page will appear. To manage the employee's coverage, click on the **Manage Coverage** tab and click the **pencil icon next to the employee's name.**

3 Change the employee's benefit plan from the benefit plan dropdown.

4. Change the employee's effective date by entering the new effective date in the new effective date field.



5. To terminate dental coverage, click on the Manage Coverage tab and click Terminate Dental. To terminate a dependent's dental coverage, click Terminate next to the dependent's name. A confirmation window will appear. Enter the termination date and click Yes to confirm termination of the employee.



6. To save changes, click Save before navigating away from the employee benefits page.

Note: Coverage will end on the termination date you enter. For example, if you want the employee to be covered through June 30, the termination date entered should be July 1. Terminating an employee will automatically terminate any dependent coverage as well.

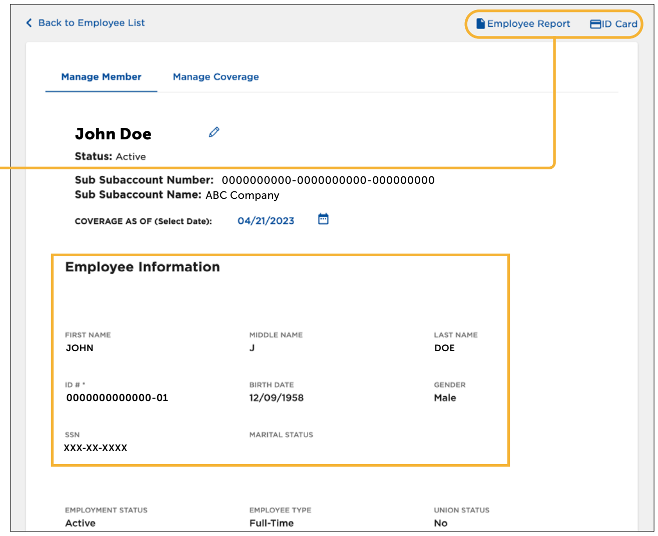
Update Employee information

1. Click on the pencil icon next to the employee's name from the employee benefits page.

2. Edit an employee's personal information, including employee status, employee type and email address or scroll down to the dependents section to update any dependent information.

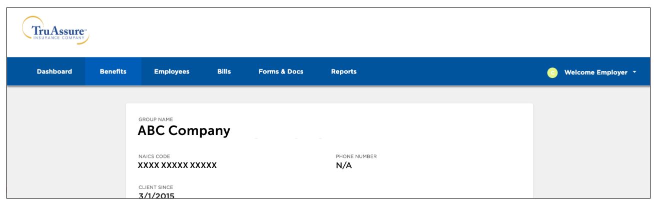
3. To save changes, click save before navigating away from the employee benefits page.

4. To download the employee's ID card or employee report, click on the **employee report** and **ID card links** located at the top of the employee screen.



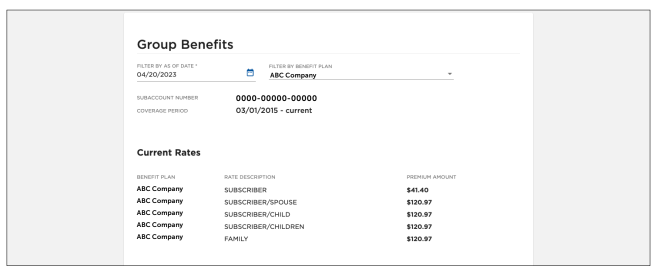
View Group Benefits by Sub-Account

1. To view your group's benefits, click on the **Benefits** tab at the top of the screen.



2. Your group benefits will appear, including rates, annual maximum amounts and coverage levels.

3. To view different benefit years or switch plans, filter by date and/or benefit plan at the top of the Benefits screen.

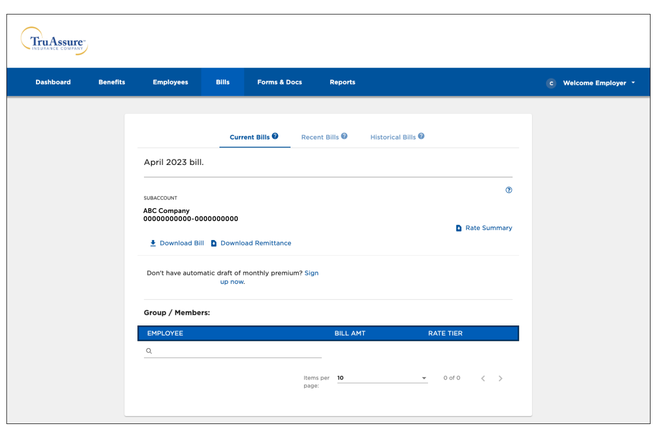


View Bills

1. To view your bills, click on the **Bills** tab at the top of the screen.

2. The bills tab will open to your current bills. To view a bill, click the **download link** and choose whether to view the bill in PDF or Excel.

3. To view bills for a previous month, click **Recent Bills.** Click **download bill** next to the bill you wish to view and choose whether to view the bill in PDF or Excel.



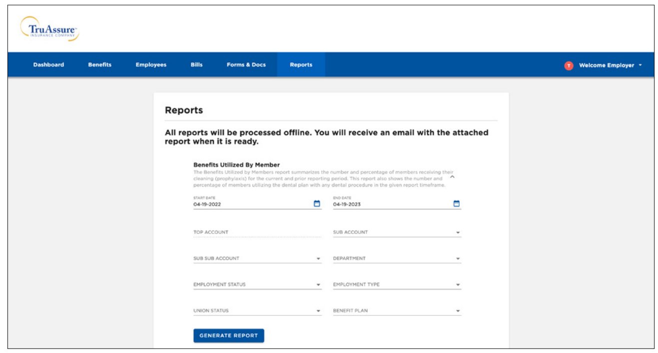
Run a Report

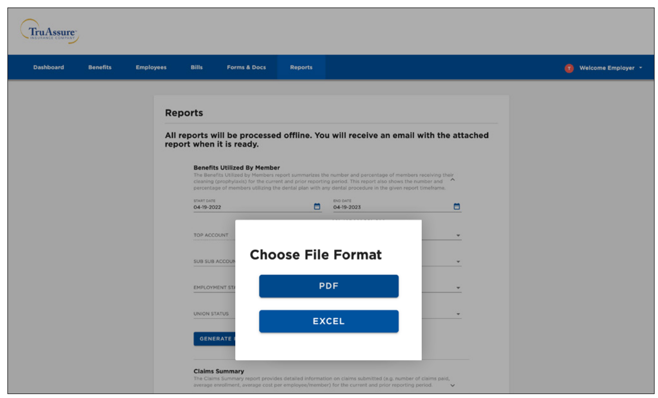
1. Once logged in, click **Reports** to access every report available to your group.

2. To run a new report, click the **dropdown arrow** next to the report you'd like to run to expand the filter choices for your report.

3. Set the filters for your report, such as department, benefit plan and start and end dates. Then click **Generate Report.**

4. Choose whether you want the report in PDF or Excel format.





Access Additional Resources

In the portal, you can access additional resources by clicking on the **Forms and Docs** tab to find forms and brochures to help you manage your group business. You can also visit the employer resource page on **TruAssure.com** for more helpful tools.