myHealthPortal User Guide

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Preface

Purpose and Scope

The myHealthPortal (myHP) application provides Wyoming healthcare-covered members secure access to member health information with the goal of engaging and empowering them to manage their health. The members are required to access the myHP from Wyoming's single sign-on (SSO) application. Once the SSO authenticates the member, they can request access to myHealthPortal. The member then creates a PIN, and can register themselves or other members of their case to the account. Once members are registered users, they can log into myHP.

Some of the tasks that members can perform in myHP are:

- View member healthcare information such as demographic details, cost share information and more.

- View paid claims details and claims history

- Search for a doctor or provider based on multiple search criteria

- Record appointments with a provider and send email alerts

- View appointments on their calendar

- Maintain and customize their own Dashboard

- Track their health measures and behaviours

Document Conventions

This document uses the following conventions:

- The terms "you" and "user" in this document refer to users of myHP.

- Menus, menu options, tabs, fields, drop-down list options, buttons, links, and page names appear in **bold** font.

- References to chapter, section, table, and figure titles appear in italics and are cross-referenced (hyperlinked).

- A **Note**, presented in the following style:

> 📄   Provides important information the user needs to observe or act upon.

Audience Requirements

This document is intended for the following users with authorized access to the myHealthPortal application:

- Wyoming Medicaid members

- State users with administrative access

Chapter 1 – Getting Started

To access the myHealthPortal (myHP) application:

1. From the Medicaid Portal, select **Member** and then **myHealthPortal**.

   The **Login to your account** page opens.

2. Enter the required User ID and Password.

3. From the **Access your Application** drop-down menu, select one of the following:

   o **myHealth Portal** if you are a member

   o **myHealth Portal Admin** if you are an administrator or State user – refer to *Chapter 14 – Administration* for details on your specific administration functionality.

   > 📄 The **Access your Application** drop-down menu displays **myHealth Portal** by default**.**

   The **PIN** page opens.

4. Enter the 4-digit numeric pin and click **Submit**.

   The **Dashboard** page opens.

At the top of each page, you will see a utility bar. This bar displays five icons that allow you to customize and manage your account:

 Add Member

 Language

 Settings

 Alerts

 Logout

1.1 Add a Member

In myHP, you can add another member to your account.

1. Click the **Add Member** icon to add a member to your account.

   The **Add Member** page opens.

2. Complete all the required fields.

   To clear your entries and start over, click **Clear**.

3. When you are finished, click **Submit**.

1.2 Select a Language

In myHP, you are able to change the language of the application to English or Spanish.

1. Click the **Language** icon.

   A menu displays with your current language selected.

2. Select either **English** or **Spanish** to switch languages.

3. Close the language menu by clicking the x in the upper right corner.

1.3 Manage Settings

By clicking the **Settings** icon, you can perform certain actions like resetting your PIN, agreeing to the Map IT Agreement, and selecting your notification preferences.

1.3.1 Reset Your PIN

1. Click the **Settings** icon on the top banner of myHealthPortal application.

   The **Settings** page opens.

2. In the **PIN** section, enter your current PIN in the **Current PIN** field.

3. Enter your new PIN in the **New PIN** field.

4. Re-enter the new PIN in the **Confirm PIN** field.

5. Click **Submit**.

   > 📄 A PIN can be four digits only.

1.3.2 Select or Update Your Notification Preference

1. Click the **Settings** icon on the top banner of myHealthPortal application.

   The **Settings** page opens.

2. In the **Notification Preferences** section, select the **Email** checkbox, the **Mobile** checkbox, or both.

   If you select the **Email** checkbox, enter your preferred email address in the corresponding field and click **Verify**.

   The **Verification Code** field enables and you receive an email with the verification code.

3. Enter the **Verification Code** you received in the appropriate field.

    If you select the **Mobile** checkbox, enter your mobile number in the corresponding field.

4. Select **Mobile** and enter the mobile number.

5. Click **Submit**.

    The Notification Preferences are saved and the application displays a confirmation message at the top of the page.

1.4 View Alerts

1. Click the **Alerts** icon.

    The **Alerts** page opens.

2. To search by date range, select the **Start** and **End** dates from the calendar icons or type in the dates.

    Or

    Click the **Range** menu and select a range option.

3. Click **Search**.

    The records display according to your search option.

4. To view the alert details, click the **Click here to read more** link beside the appropriate alert record.

5. To remove an alert, click the **x** in the **Remove** column beside the appropriate alert record.

1.5 Logout

Click the **Logout** icon to logout of the myHealthPortal application.

1.6 Switch Member

At the top of the left navigation bar, click **Switch User** to switch to another user's profile.

1.7 View Your Profile

At the top of the left navigation bar, click **My Profile** to view your profile.

1.8 Search

At the top of the left navigation bar, type keywords into the **Search…** box and click the search icon to search throughout the application.

Chapter 2 – Dashboard

The Dashboard is what you will see after logging into myHP. It comprises different widgets that you can customize. If you happen to be on another page of the application, you can return to your Dashboard by selecting **Dashboard** from the left navigation bar.

2.1 Configure Your Dashboard

1. Click **Configure** in the upper-right corner of the Dashboard.

   The configure menu displays.

2. Select the options beside the widgets you want displayed on your Dashboard.

3. When you are finished, close the menu by clicking the x in the upper-right corner of the menu.

2.2 Calendar Events

1. In the **Calendar Events** widget, you will see your upcoming doctor appointments.

2. Click **More Events** to view the full calendar.

2.3 News

1. In the **News** widget, you will see links to news articles from the **Centers for Disease Control and Prevention** (CDC).

2. Select a link to navigate to the news article.

2.4 Favorite Doctors

1. From the **Favorite Doctors** widget, select a doctor's name link.

   The **Favorite Doctor** page opens.

2. After viewing the doctor details, click **Dashboard** to return to your Dashboard.

3. To remove a favorite doctor from the widget, click the x beside the doctor's record.

2.5 My Health Tracker

4. From the **My Health Tracker** widget, select one of the menu options from the **Healthy Behaviours** tab. These options include:

   o Activity

   o Water Intake

   o Fruits and Vegetables

- o   Smoking

- o   Alcohol

- o   Screen Time

5. Complete the required fields that display for your selection and click the green checkmark when you are done.

6. Repeat steps 4 and 5 to continue tracking your healthy behaviours.

7. Click the **Healthy Measures** tab. From here, select one of the menu options:

- o   BMI/Weight

- o   Blood Pressure

- o   Blood Glucose

- o   Flu Shot

8. Complete the required fields that display for your selection and click the green checkmark when you are done.

9. Repeat steps 7 and 8 to continue tracking your healthy measures.

> 📄   Beside any menu selection in this widget, you can click the blue clock icon to view the history of your entries.

Chapter 3 – Demographics

myHP allows you to view the demographic information for a member. If members need to edit their demographic information, they will need to contact the help line or email address.

1. From the left navigation bar, select **Demographics**.

   The **Demographics** page opens. From here, you can see your demographic details such as gender, date of birth, age, race, ethnicity, and more.

2. In the upper-right corner of the page, click the **All Profiles** menu tab to view the icons representing other members under your profile.

3. Click the icon corresponding to the member to view the demographic details for that member.

4. Verify that the demographic details displayed are correct.

   If the details shown are incorrect, click the link in the **Disclaimer** box.

   The **Contact Us** page opens. In case of any discrepancy, you can edit or update the demographic information by contacting the Beneficiary Help Line by phone or mail.

Chapter 4 – My Health Wallet

In the myHP application, you can view the details of your health card and request a new card.

4.1 Health Card

4.1.1 View Your Health Card

1. From the left navigation bar, select **My Health Wallet**.

   A drop-down menu opens.

2. Select **Health Card**.

   The **Health Card** page opens.

3. View your health card as well as your request card history, if any.

4.1.2 Request a New Health Card

1. From the left navigation bar, select **My Health Wallet**.

   A drop-down menu opens.

2. Select **Health Card**.

   The **Health Card** page opens.

3. Click **Request a Card**.

   The **Request a Card** page opens.

4. Verify that the **Member ID**, **First Name**, **Last Name**, and **Address** displayed are correct.

   If the details shown are incorrect, click the link in the **Disclaimer** box.

   The **Contact Us** page opens. In case of any discrepancy, you can edit or update the information by contacting the Beneficiary Help Line by phone or mail.

5. Click **Submit** to submit a new card request.

   You will see a confirmation message at the top of the page.

4.1.3 Print Your Health Card

> 📄   Before your begin, ensure you are connected to a printer.

1. From the left navigation bar, select **My Health Wallet**.

   A drop-down menu opens.

2. Select **Health Card**.

   The **Health Card** page opens.

3. Click **Print**.

   A PDF of your health card opens in a separate window.

4. In the PDF file, click the **Print** icon to print the front and back of your health card.

5. After printing completes, close the PDF window.

4.2 Other Insurance

4.2.1 Viewing Other Insurances

1. From the left navigation bar, select **My Health Wallet**.

   A drop-down menu opens.

2. Select **Other Insurances**.

   The **Other Insurances** page opens.

3. To search by date range, select the **Start** and **End** dates from the calendar icons or type in the dates.

   Or

   Click the **Range** menu and select a range option.

4. Select **Search**.

   The records display according to your search option.

5. Select the **Click to view details** link beside the appropriate other insurance record.

   The **Other Insurance Details** pop-up opens.

6. When you finish viewing the insurance details, select the **X** to close the pop-up.

Chapter 5 – Find a Doctor

In myHP, you can search for a provider. You can search based on the doctor's specialty and proximity to your location, add a doctor to your favorites, add the scheduled appointment to your calendar, and more.

1. From the left navigation bar, select **Find a Doctor**.

   The **Find a Doctor** page opens.

2. Type or select the appropriate search criteria in at least one of the following fields:

   o **Search by Name**

   o **Search by Type**

   o **Search by Specialty**

3. In the Location section, select one of the following options:

   o **Profile** – Uses the address from your profile.

   o **Current Location** – Loads a map and uses your location to search; you can also enter an address if needed.

   o **Other** – Enter the address in the fields provided.

4. Click **Search**.

   The search results display.

5. From the search results, you can perform the following actions:

   o Click **Add to Favorites** beside the appropriate search result. The selected doctor will display in your **Favorite Doctors** widget on your Dashboard.

   o Click **Add to My Calendar** beside the appropriate search result. This appointment will be added to your **Calendar Events** widget on your Dashboard.

   o Click **Email** beside the appropriate search result. Enter your email address on the **Send Email** page and click **Submit**. The doctor's information is sent to the submitted email address.

Chapter 6 – Healthcare Coverage

myHP allows you to view the details of a benefit plan, the cost-sharing details of your health coverage (if applicable), and benefit utilization details.

6.1 View Benefits Details

1. From the left navigation bar, select **Healthcare Coverage**.

   A drop-down menu opens.

2. Select **Benefits**.

   The **Benefits** page opens.

3. To search by date range, select the **Start** and **End** dates from the calendar icons or type in the dates.

   Or

   Click the **Range** menu and select a range option.

4. Click **Search**.

   The records display according to your search option.

5. In the search results, click the **Click to view details** link beside the appropriate record.

   The **Benefit Details** page opens.

6. When you are finished viewing the details, click **Back** to return to the **Benefits** page.

6.2 View Cost Share Details

1. From the left navigation bar, select **Healthcare Coverage**.

   A drop-down menu opens.

2. Select **Cost Share**.

   The **Cost Share** page opens.

3. View the cost share details of the current quarter.

6.3 View Benefits Utilization Details

1. From the left navigation bar, select **Healthcare Coverage**.

   A drop-down menu opens.

2. Select **Benefits Utilization**.

The **Benefits Utilization** page opens with the current year's records displayed. From here, you can see the coverage, allowed units, used units, remaining units, and year.

3. To view the benefits utilization for previous years, select the year from the **Search by Benefit Plan Year (YYYY)** drop-down list. Then, click **Search**.

The selected year's records display in the search results.

Chapter 7 – Communications

In myHP, you can view, search, and manage member communications. You can also view the details of inquiries, view and file a complaint, view the list of letters, request for disclosure of protected health information, and more.

7.1 View Inquiries

1. From the left navigation bar, select **Communications**.

   A drop-down menu opens.

2. Select **Inquiries**.

   The **Inquiries** page opens.

3. To search by date range, select the **Start** and **End** dates from the calendar icons or type in the dates.

   Or

   Click the **Range** menu and select a range option.

4. Click **Search**.

   The records display according to your search option. From the search results, you can see the inquiry's submitted date, method, type, reason, and status.

7.2 View Complaints

1. From the left navigation bar, select **Communications**.

   A drop-down menu opens.

2. Select **Complaints**.

   The **Complaints** page opens.

3. To search by date range, select the **Start** and **End** dates from the calendar icons or type in the dates.

   Or

   Click the **Range** menu and select a range option.

4. Click **Search**.

   The records display according to your search option.

5. In the **Details** column, click the **Click to view details** link beside the appropriate complaint.

   The **Complaint Details** pop-up opens.

6. If an Attachment link exists, click the link to view the attachment.

    A separate window opens displaying the attached document. After you finish viewing the attachment, close the window.

7. Close the **Complaint Details** pop-up by clicking the x in the upper-right corner of the pop-up.

7.3 File a Complaint

1. From the left navigation bar, select **Communications**.

    A drop-down menu opens.

2. Select **Complaints**.

    The **Complaints** page opens.

3. Click **File a Complaint**.

    The **File a Complaint** page opens.

4. Complete the required fields.

5. Click **Browse** to search for a document on your computer to upload to the complaint. Click the plus button to add additional attachments.

6. If you are filing a complaint for yourself, select the **I am filing this complaint for myself** checkbox.

7. When you are finished, click **Submit**.

> 📄 If you need to start the complaint over, click **Clear** to clear your entries.

7.4 Letters

1. From the left navigation bar, select **Communications**.

    A drop-down menu opens.

2. Select **Letters**.

    The **Letters** page opens.

3. To search by date range, select the **Start** and **End** dates from the calendar icons or type in the dates.

    Or

    Click the **Range** menu and select a range option.

4. Click **Search**.

    The records display according to your search option.

5. To view the attachment for a specific record, click the **Attachment** icon.

   The attachment opens in a separate window.

Chapter 8 – Authorizations

myHP enables you to view and search for the details of prior authorization. You can view details like the diagnosis description, provider information, and authorization information.

1. From the left navigation bar, select **Authorizations**.

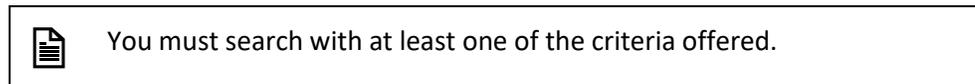   The **Authorizations** page opens.

2. To search by date range, select the **Start** and **End** dates from the calendar icons or type in the dates.

   Or

   Click the **Range** menu and select a range option.

   Or

   Select or enter a **Status**, **Provider Name**, **Service**, or **Authorization Tracking Number**.

   > 📄   You must search with at least one of the criteria offered.

3. Click **Search**.

   The records display according to your search option.

1. In the search results, or **Authorization List** section, you can view the authorization number, request date, start date, requesting provider, and more.

2. To view authorization details, click the link in the **Details** column beside the appropriate record.

   The **Authorization Details** page opens showing the diagnosis, provider, and authorization information.

3. When you are finished viewing the details, click **Back** to return to the previous page.

Chapter 9 – Claims

You can view and search for claims submitted by a provider within the myHP application. You can search for claims by providing the date of service, claim type, or the provider name. You can also file a complaint against a fraudulent claim by providing the relevant information such as the reason for complaint, claim type, provider details, and more.

9.1 View Claims

1. From the left navigation bar, select **Claims**.

   The **Claims** page opens.

2. To search by date range, select the **Start** and **End** dates from the calendar icons or type in the dates.

   Or

   Click the **Range** menu and select a range option.

   Or

   Select or enter a **Claim Type** or **Provider Name**.

   > 📄   You must search with at least one of the criteria offered.

3. Click **Search**.

   The records display according to your search option.

4. In the search results, or **Claims List** section, you can view the provider name, health plan, claim type, charges, and more.

5. To view claim details, click the link in the **Details** column beside the appropriate record.

   The **Claim Details** page opens.

6. When you are finished viewing the details, click **Back** to return to the previous page.

9.2 Report Claim Fraud

1. From the left navigation bar, select **Claims**.

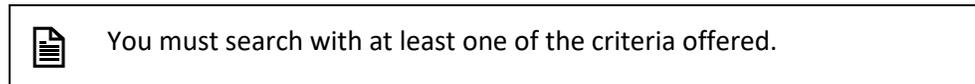   The **Claims** page opens.

2. To search by date range, select the **Start** and **End** dates from the calendar icons or type in the dates.

   Or

   Click the **Range** menu and select a range option.

Or

Select or enter a **Claim Type** or **Provider Name**.

> 📄 You must search with at least one of the criteria offered.

3. Click **Search**.

    The records display according to your search option.

4. In the search results, or **Claims List** section, you can view the provider name, health plan, claim type, charges, and more.

5. To view claim details, click the link in the **Details** column beside the appropriate record.

    The **Claim Details** page opens.

6. In the **Disclaimer** box, click **Please click here to report fraud corresponding to the Claim**.

    The **File a Complaint** page opens.

7. Complete the required fields.

8. Click **Browse** to search for a document on your computer to upload to the complaint. Click the plus button to add additional attachments.

9. If you are filing a complaint for yourself, select the **I am filing this complaint for myself** checkbox.

10. When you are finished, click **Submit**.

> 📄 If you need to start the complaint over, click **Clear** to clear your entries.

Chapter 10 – Health Tracker

In myHP you can view and set goals towards healthy behaviours such as physical activity, water intake, screen time, and so on. You can also set and track health measures like your blood pressure, blood glucose levels, BMI/weight, and more. Within this section of myHP, you can also get more health information through the article links provided.

10.1 Healthy Behaviours

10.1.1 Set and Track Healthy Behaviours

1. From the left navigation bar, select **Health Tracker**.

   The **Healthy Behaviours** page opens and displays the healthy behaviour widgets.

2. Click **Set/Track Goal** or **Track** for any of the widgets on the page.

   The corresponding behaviour page opens.

3. From here, you can do the following:

   o Click **Add Entry**. Complete the required fields on the **Entry** page and click **Submit**.

   o Click **Edit** to edit the most recent entry. Update the required information and click **Submit**.

   o Click **Edit Goal** to edit your behavior goal. Update the required information and click **Submit**.

   o If you are a woman, you have the ability to track periods and pregnancy information with the **Women's Cycle Tracker** and **Pregnancy Tracker** widgets.

4. Click **Back** to return to the **Healthy Behaviours** page.

10.1.2 Search Recent Entries

1. From the left navigation bar, select **Health Tracker**.

   The **Healthy Behaviours** page opens and displays the healthy behaviour widgets.

2. Click **Set/Track Goal** for any of the widgets on the page.

   The corresponding behaviour page opens.

3. In the **Recent Entries** section, to search by date range, select the **Start** and **End** dates from the calendar icons or type in the dates.

   Or

   Click the **Range** menu and select a range option.

4. Click **Search**.

   The records display according to your search option.

10.1.3 View a Chart

1. From the left navigation bar, select **Health Tracker**.

    The **Healthy Behaviours** page opens and displays the healthy behaviour widgets.

2. Click **Set/Track Goal** for any of the widgets on the page.

    The corresponding behaviour page opens.

3. Click **Chart IT**, if available, to view a chart of your goal and recent entries.

10.2 Healthy Measures

10.2.1 Set and Track Healthy Measures

1. From the left navigation bar, select **Health Tracker**.

    The **Healthy Behaviours** page opens.

2. Click the **Healthy Measures** tab.

    The **Healthy Measures** page opens.

3. Click **Set/Track Goal** or **Entry** for any of the widgets on the page.

    The corresponding measure page opens.

4. From here, you can do the following:

    o   Click **Add Entry**. Complete the required fields on the **Entry** page and click **Submit**.

    o   Click **Edit** to edit the most recent entry. Update the required information and click **Submit**.

    o   Click **Edit Goal** to edit your measure goal. Update the required information and click **Submit**.

5. Click **Back** to return to the **Healthy Behaviours** page.

10.2.2 Search Recent Entries

1. From the left navigation bar, select **Health Tracker**.

    The **Healthy Behaviours** page opens.

2. Click the **Healthy Measures** tab.

    The **Healthy Measures** page opens.

3. In the **Recent Entries** section, to search by date range, select the **Start** and **End** dates from the calendar icons or type in the dates.

    Or

    Click the **Range** menu and select a range option.

4. Click **Search**.

   The records display according to your search option.

10.3 More Information

1. From the left navigation bar, select **Health Tracker**.

   The **Healthy Behaviours** page opens.

2. Click the **More Information** tab.

   The **More Information** page opens. Along the left side of the page are categories that when selected show links to health-related articles and tips.

3. Select a category and then select the link of the information you want to view.

   The article will open in a separate window.

Chapter 11 – Travel Request

Members can raise a travel request and be reimbursed for their visits made for medical purposes based on the distance traveled.

11.1 Submit a Personal Travel Request

1. From the left navigation bar, select **Travel Request**.

   The **Travel Request Information** page opens.

2. In the **Travel Request Form** section, click **Submit Personal Travel Request form**.

   The **Travel Request Section 1** page opens.

3. Complete the required travel information.

4. In the address area, enter the **Doctor's Address** and **Zip**. Then, click **Validate Address**.

   The system displays an **Address validation successful** message for a correct address and an **Invalid Address** message if the address is wrong.

5. Click **Next**.

   The **Travel Request Section 2** page opens.

6. Complete the required member information.

7. For completing the address fields:

   a. Enter the **Full Physical Address** and **Zip**. Then, click **Validate Address**.

   The system displays an **Address validation successful** message for a correct address and an **Invalid Address** message if the address is wrong.

   b. Enter the **Payee Address** and **Zip**. Then, click **Validate Address**.

   The system displays an **Address validation successful** message for a correct address and an **Invalid Address** message if the address is wrong.

8. Click **Next**.

   The **Travel Request Section 3** page opens.

9. If the member is under 21 years of age, complete section 3.

10. Click **Submit**.

    The **Requested Travel List** page opens displaying the newly added travel request in the list.

11.2 View Travel Requests

1. From the left navigation bar, select **Travel Request**.

The **Travel Request Information** page opens.

2. To search by date range, select the **Start** and **End** dates from the calendar icons or type in the dates.

    Or

    Click the **Range** menu and select a range option.

3. Click **Search**.

    The records display according to your search option.

4. In the search results, select **Click here to View/Upload Documents** beside the appropriate record.

    The **View/Upload Documents** page opens. From this page, you can view the request details and the history of uploaded documents.

11.3 Upload Documents

1. From the left navigation bar, select **Travel Request**.

    The **Travel Request Information** page opens.

2. To search by date range, select the **Start** and **End** dates from the calendar icons or type in the dates.

    Or

    Click the **Range** menu and select a range option.

3. Click **Search**.

    The records display according to your search option.

4. In the search results, select **Click here to View/Upload Documents** beside the appropriate record.

    The **View/Upload Documents** page opens.

5. To upload a document, click **Upload**.

    The **Upload Travel Request Documents** page opens.

6. Click **Choose File**.

    Your computer's **Open** dialog opens.

7. Navigate to where the applicable document is located and select it. Then, click **Open**.

    The file name populates in the **File Path** box.

8. Enter an applicable notes in the **Notes** field.

9. Click **Submit** to upload the document to the travel request.

Chapter 12 – FAQ

myHP stores a list of frequently asked questions (FAQs) that you can view. You can see answers to questions about error messages, whether you can view your family member's information, and so on.

1. From the left navigation bar, select **FAQ**.

   The **Frequently asked questions** page opens.

2. Review the answers to the FAQs.

Chapter 13 – Contact Us

From the left navigation bar, select **Contact Us**. The **Contact Us** page opens and displays the contact information for the help desk.

Chapter 14 – Administration

The myHP administration module provides the functions for administrators and State users to assist in the access of myHP by members. Within this module, as an administrator, you can do the following:

- Search and view member registration details
- View member communications
- Schedule member communications
- Search and manage accounts

14.1 View Member Registration Details

1. From the left navigation bar, select **Members** and then **Registration Details**.

   The **Registration Details** page opens.

2. Enter the appropriate **Member ID** and click **Search**.

   The member's registration details display, including the member's date of birth, name, Zip code, and relationship type. You can also view the member's registration failure history, if applicable.

3. Click **View More** to view additional details.

   The **Member Registration Details** pop-up opens and displays more details such as the member's benefit plan.

4. When you are finished viewing the details, close the pop-up by clicking the x in the upper right corner.

14.2 Manage Member Communications

14.2.1 View Member Communications

1. From the left navigation bar, select **Member Communications**.

   The **Member Communications** page opens.

2. Select or enter the applicable search criteria. You must search with at least one of the following criteria:

   - **Communication Method**
   - **Account Group**
   - **Frequency**
   - **Created By**
   - **Scheduled Date** – Enter a date range or select a Range from the drop-down list.

o **Status**

3. Click **Search**.

   The search results display below in the **Member Communications List**.

4. Select **Click to view details** beside the appropriate record.

   The **Communication Details** page opens displaying the member's communication settings and content.

5. Click **Back** to return to the **Member Communications** page.

> 📄 You can also delete or pause a communication by clicking the applicable icon in the **Action** column of a communication record.

14.2.2 Schedule Communication

1. From the left navigation bar, select **Member Communications**.

   The **Member Communications** page opens.

2. Click **Schedule Communication**.

   The **Schedule Communication** page opens.

3. Complete the required fields and click **Schedule**.

   A confirmation message displays.

4. Click **Submit** to schedule the alert.

14.2.3 Search Accounts

1. From the left navigation bar, select **Member Communications**.

   The **Member Communications** page opens.

2. Select or enter the applicable search criteria. You must search with at least one of the following criteria:

   o **Communication Method**

   o **Account Group**

   o **Frequency**

   o **Created By**

   o **Scheduled Date** – Enter a date range or select a **Range** from the drop-down list.

   o **Status**

3. Click **Search**.

The search results display below in the **Member Communications List**.

4. Select a link in the **Account Group** column for the appropriate record.

   The **Search Accounts** page opens.

5. Search the accounts by selecting and entering one of the following:

   o **Member ID**

   o **Login ID** (default)

   o **Custom Search** – Search using at least one of the search criteria that displays.

6. Click **Search**.

   The search result populates in the **Accounts List**. From here, you can view the member's ID, login ID, name, relationship name, and relationship type.

7. Click **Back** to return to the **Member Communications** page.

14.3 Account Groups

14.3.1 Manage Account Groups

1. From the left navigation bar, select **Members** and then **Account Groups**.

   The **Account Groups** page opens.

2. Select the **Start** and **End** dates from the calendar icons or type in the dates.

   Or

   Click the **Range** menu and select a range option.

3. Click **Search**.

   The records display according to your search option.

4. From the **Action** column, you can delete a record by clicking the red x icon.

5. From the **Action** column, click the ID card icon.

   The **Search Accounts** page opens.

6. Search the accounts by selecting and entering one of the following:

   o **Member ID**

   o **Login ID** (default)

   o **Custom Search** – Search using at least one of the search criteria that displays.

7. Click **Search**.

The search result populates in the **Accounts List**. From here, you can view the member's ID, login ID, name, relationship name, and relationship type.

8. Click **Update Existing** to update the search criteria of the existing account group.

14.3.2 Create an Account Group

1. From the left navigation bar, select **Members** and then **Account Groups**.

   The **Account Groups** page opens.

2. Click Search Accounts.

   The Search Accounts page opens.

3. Search the accounts by selecting and entering one of the following:

   o **Member ID**

   o **Login ID** (default)

   o **Custom Search** – Search using at least one of the search criteria that displays.

4. Click **Search**.

   The search result populates in the **Accounts List**. From here, you can view the member's ID, login ID, name, relationship name, and relationship type.

5. Click **Save** to save the account group.

Chapter 15 – Glossary

This section provides definitions for document-specific terms in the following format: Entries will be listed in alphabetical order, and items beginning with numbers will come first.

Table 1. Glossary

Term	Description
Cost Share	The share of costs covered by insurance that is paid out of pocket. This generally includes deductibles, coinsurance, and copayments. For Medicaid, this also includes premiums.
Dashboard	A tool that organizes, stores, and displays information from multiple data sources into one accessible place.
Demographics	Details about a person such as gender, date of birth, age, race, ethnicity, and more.
Member	A person who has or may have health care insurance through the Medicare or Medicaid program. Synonyms include "recipient" and "beneficiary."

Chapter 16 – Acronyms

This section provides definitions for document-specific terms in the following format: Entries will be listed in alphabetical order, and items beginning with numbers will come first.

Table 2. Acronyms

Acronym	Definition
BMI	Body Mass Index
CDC	Centers for Disease Control and Prevention
FAQ	Frequently Asked Question
myHP	myHealthPortal
PDF	Portable Document Format (Adobe)
PIN	Personal Identification Number
SSO	Single Sign-On