

Admin Portal Training

Administration Portal: www.chimanager.com/manage

Login:

Password:

To Download the Member Census

1. Select View Members
2. Click either Download (more Member Data) or Export.
3. An Excel file will pop up in the bottom left corner.
4. This file can be filtered to limit the active/inactive members.

The screenshot shows the 'Members' section of a software interface. It features a 'View Members' button highlighted in yellow. Below it is a dropdown menu for 'Member Products*' with a 'View' button. There are also links for 'Member Basic Search' and 'Member Advanced Search'. The 'Agents' section below has a 'View Agents' button and a dropdown for 'Agents and Groups*' with a 'View' button, and a link for 'View Agent Tree'. The 'Invoices' section has links for 'View Invoices', 'View Members', and 'View Groups'.

The screenshot shows the Member Census table and its controls. At the top right, there is a user profile icon. Below it, there are controls for 'Keep Search' (checked), 'Member Products*' (dropdown), 'View List', 'Member Products' (dropdown), and a 'Download' button highlighted in yellow. Below these are icons for 'Summary', 'Map', 'Work', and 'Export' (highlighted in yellow). The table has columns for 'Fulfillment', 'Active', 'Next Billing', 'Inactive', 'View', and 'Batch'. The table contains five rows of data, each with a 'View' button (info icon) and a 'Batch' checkbox. At the bottom right, there are links for 'Check All', 'Uncheck All', and 'Top of Page'.

	Fulfillment	Active	Next Billing	Inactive	View	Batch
)	10/10/2020	10/10/2020	11/1/2020		(i)	<input type="checkbox"/>
)	10/10/2020	10/10/2020	11/1/2020		(i)	<input type="checkbox"/>
)	10/10/2020	10/10/2020	11/1/2020		(i)	<input type="checkbox"/>
)	10/10/2020	10/10/2020	11/1/2020		(i)	<input type="checkbox"/>
)	10/10/2020	10/10/2020	11/1/2020		(i)	<input type="checkbox"/>

Employee Terminations

Member lookup: View Members OR Search (Members Basic)for Specific Member

The screenshot displays the 'Benefits Admin' web application interface. At the top, a blue navigation bar contains the following elements from left to right: the text 'Benefits Admin', a 'Home' icon, a 'Search' icon, a 'Members' icon, an 'Agents' icon, and a 'User' icon. Below the navigation bar, the main content area is divided into three columns. The left column features a 'Good Afternoon' greeting, the date 'Monday, May 6, 2019', and user information for 'Benefits Admin (1297)'. The middle column, titled 'Members', contains a 'View Members' link, a dropdown menu for 'Member Products*' with a 'View' button, and two search options: 'Member Basic Search' and 'Member Advanced Search'. The right column, titled 'Agents', contains a 'View Agents' link, a dropdown menu for 'Agents and Groups*' with a 'View' button, and a 'View Agent Tree' link. A yellow arrow points to the 'Search' icon in the navigation bar, and another yellow arrow points to the 'View Members' link in the 'Members' section. At the bottom left, there is a 'Notes' section with a yellow 'Edit note' box and a 'Saved' confirmation message.

Benefits Admin Home Search Members Agents User

Good Afternoon Monday, May 6, 2019

Benefits Admin (1297)
Test Group (313795)
Username: testthis
Website: <http://www.chimanager.com/313795>
Last Login: May 6, 2019 at 5:50 PM

Test Group • Mister Manager
123 Fake Louisville KY 40245
Phone: (405) 403-2222
Email: qpearl@competitivehealth.com

Members

- View Members
- Member Products* View
- Member Basic Search
- Member Advanced Search

Agents

- View Agents
- Agents and Groups* View
- View Agent Tree

Notes

Edit note.

Saved

View Members

If your group has many members, click “Name Last” to sort members’ last names alphabetically.



	ID	Name First	Name Last	Address City	Address State	Address Zip Code	Phone	Email	Product	F
(313795)	674868204	Bill	Worker	Louisville	KY	40245	(393) 920-2929		Telemedicine Plan	\$t
(313795)	674868203	Kevin	Lineworker	Louisville	KY	40245	(988) 334-5555		Telemedicine Plan	\$t
(313795)	674868164	Bob	Brown	Louisville	KY	40245	(999) 333-4939		Telemedicine Plan	\$t
(313795)	674868163	John	Smith	Louisville	KY	40245	(502) 559-1919		Telemedicine Plan	\$t

View Members

Scroll to Select the Member to Terminate

Click on the Member ID (in blue)



	ID	Name First	Name Last	Address City	Address State	Address Zip Code	Phone	Email	Product	F
(313795)	674868204	Bill	Worker	Louisville	KY	40245	(393) 920-2929		Telemedicine Plan	\$6
(313795)	674868203	Kevin	Lineworker	Louisville	KY	40245	(988) 334-5555		Telemedicine Plan	\$6
(313795)	674868164	Bob	Brown	Louisville	KY	40245	(999) 333-4939		Telemedicine Plan	\$6
(313795)	674868163	John	Smith	Louisville	KY	40245	(502) 559-1919		Telemedicine Plan	\$6

Search Specific Member:

Enter Member's First and Last name and click "Search" to pull up the member's profile.

Member Basic Search

Member IDs:
(one-per-line or comma list)

Agent ID: Tree

Agent IDs:
(one-per-line or comma list)

Code:
(one-per-line or comma list)

First Name: ←

Last Name: ←

Phone: ()

State:

Zip Code:

Email Address:

Internal ID:

Product Created From: To:

Product Active From: To:

Product Inactive From: To:

Products:
21564 - Individual Enhanced (M, ...Enhanced (M, BH, DERM)
24514 - Basicare Plus - Basicare Plus
19635 - Benefits Advisory Group - Group Eligibility
19634 - HUB International - MDLIV...International - MDLIVE
22203 - MDLIVE - MDLIVE Colonial 2nd Year
23716 - MDLIVE & KARIS360 - MDLKARIS Monthly
19554 - MDLIVE Annual - Group Eligibility (Annual)

Status: Active Inactive All

Sort: Name ID

Product IDs:
(one-per-line or comma list)

Category:

Member IDs:
(one-per-line or comma list)

Member First Name: Last:

Sort By:

↓

Once in the member's profile hover over the “edit” and select/click “Inactive date”.

Benefits Admin Home Search Members Agents User


Kevin Lineworker - 674868203 | Stats Sections

Kevin Lineworker

[Edit Member](#) **N**

Contact	Set Up
Member ID: 674868203	Created: March 21, 2019 at 10:12 AM
Name: Kevin Lineworker	Agent: 313795 - Test Group
Address: 8999 Shelbyville Rd. Louisville, KY 40245 Verify - Replace - Local - Map	Username: 674868203
Local Time: 6:35 PM Eastern Daylight Time	Password: Zyf8frpt1h
Phone 1: 988-334-5555	Tracking
Attributes	IP Address: 74.139.244.60
Date of Birth: 7/10/1954	
Age: 64	

Products

Label	Fees	Dates	Information	
Telemedicine Plan ID: 23312 Admin: Telemedicine Plan Category: Group	Product \$15.00 per Month	Created: March 21, 2019 Active: April 1, 2019	Paid: Yes Payments: 0	 Edit

Inactive Date



Populate the inactive date as the **date of termination** and select the reason. Then click “Ok”.

Benefits Admin Home Search Members Agents User

Kevin Lineworker - 674868203 | Stats Sections

Kevin Lineworker

Edit Member Notes

Contact

Member ID: 674868203
Name: Kevin Lineworker
Address: 8999 Shelbyville Rd.
Louisville, KY 40245
Local Time: 6:11 PM Eastern Dayli
Phone 1: 988-334-5555

Attributes

Date of Birth: 7/10/1954
Age: 64

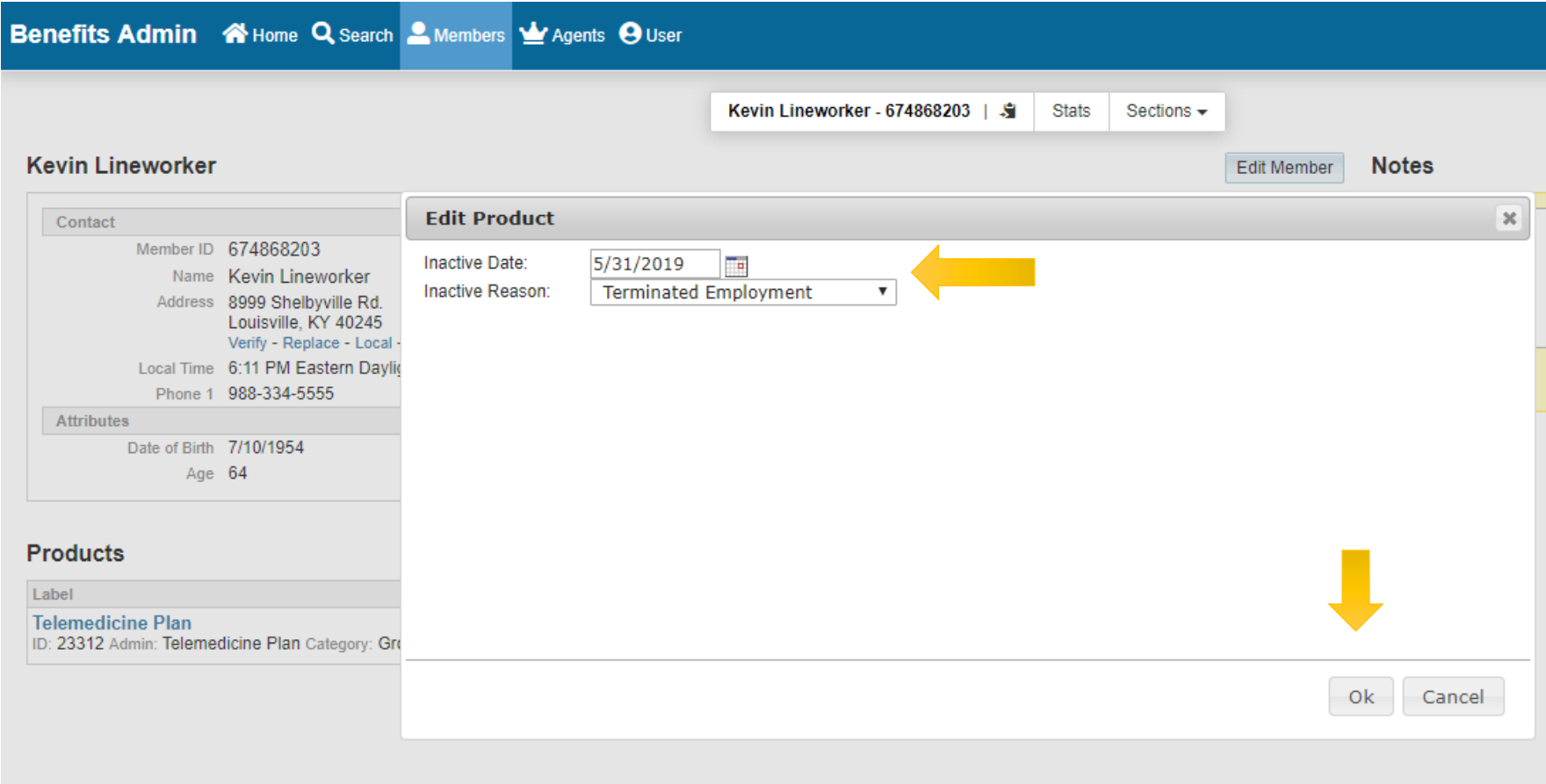
Products

Label: **Telemedicine Plan**
ID: 23312 Admin: Telemedicine Plan Category: Gro

Edit Product

Inactive Date: 5/31/2019
Inactive Reason: Terminated Employment

Ok Cancel



Once termination has been completed the member's product will be highlighted red and shown with an inactive date.

Kevin Lineworker

Contact	Member ID 674868203 Name Kevin Lineworker Address 8999 Shelbyville Rd. Louisville, KY 40245 Verify - Replace - Local - Map Local Time 9:19 AM Eastern Daylight Time Phone 1 988-334-5555	Set Up	Created March 21, 2019 at 10:12 AM Agent 313795 - Test Group Username 674868203 Password Zyf8frpt1h
Attributes	Date of Birth 7/10/1954 Age 64	Tracking	IP Address 74.139.244.60



Products

Label	Fees	Dates	Information
Telemedicine Plan ID: 23312 Admin: Telemedicine Plan Category: Group	Product \$6.00 per Month	Created: March 21, 2019 Active: April 1, 2019 Inactive: April 30, 2019	Inactive - Terminated Employment Paid: Yes Payments: 0

Adding New Hires

At the home screen, click “View Agents”

The screenshot shows the 'Benefits Admin' home screen. At the top is a dark blue navigation bar with the text 'Benefits Admin' and icons for Home, Search, Members, Agents, and User. Below the navigation bar, the main content area is divided into three sections: 'Good Afternoon', 'Members', and 'Agents'. The 'Good Afternoon' section displays user information for 'testthis', including their role as 'Mister Manager' and contact details. The 'Members' section contains a 'View Members' link, a dropdown menu for 'Member Products*' with a 'View' button, and two search options: 'Member Basic Search' and 'Member Advanced Search'. The 'Agents' section contains a 'View Agents' link, a dropdown menu for 'Agents and Groups*' with a 'View' button, and a 'View Agent Tree' link. A yellow arrow points to the 'View Agents' link. At the bottom left, there is a 'Notes' section with a yellow text area containing 'Edit note.' and a 'Saved' button with a green checkmark.

Benefits Admin Home Search Members Agents User

Good Afternoon Monday, May 6, 2019

Benefits Admin (1297)
Test Group (313795)
Username: testthis
Website: <http://www.chimanager.com/313795>
Last Login: May 6, 2019 at 6:38 PM

Test Group • Mister Manager
123 Fake Louisville KY 40245
Phone: (405) 403-2222
Email: qpearl@competitivehealth.com

Members

- View Members

Member Products* View

- Member Basic Search
- Member Advanced Search

Agents

- View Agents

Agents and Groups* View

- View Agent Tree

Notes

Edit note.

Saved

Select Web Link (link icon) to go to the enrollment page

Benefits Admin [Home](#) [Search](#) [Members](#) [Agents](#) [User](#)

Agents and Groups


Keep Search Agents and Groups* [View List](#)

Total: 1 • Page: 1 [Tree](#) [Map](#)

#	Parent	Created	Type	ID	Plan Code	Label	Contact	City	State	Phone	Email	Web	Prod	Members	Tree
1	Demo Agency 313790 TREE	Sep 24, 2018		313795		Test Group	Mister Manager Test Group	Louisville	KY	(405) 403-2222			1		

Total: 1 • Page: 1 [Top of Page](#)

[Show/Hide URL](#)



Click “Member Enrollment”



MEMBER ENROLLMENT

24-7 Doctor Call Telemedicine Service

Using 24-7 Doctor Call saves you time and money for many of your medical issues instead of expensive and time-consuming ER, urgent care or doctor's office visits.

Get Started



Click “Continue” (no longer “check out”)



Enrollment	Cost	Remove
Telemedicine Plan \$15.00 per Month	\$15.00	<input type="button" value="X"/>

Product:	\$15.00
Total:	\$15.00

←



Complete the registration form including the effective date.



Member

Company Name

First Name *

Last Name *

Address

Address *

Address 2

City *

State *

Zip Code *

[Verify Address](#)

Contact

Phone Number - - *

Email Address *

Enrollment

Telemedicine Plan

Product per Month Members: \$15.00

Effective Date 




Total \$15.00


Sign your name in the signature rectangle by holding left click and drawing in a signature. Once you click “Submit order” member will receive a welcome email with activation instructions on the effective date.

Authorization

By checking the box, I acknowledge that I understand and agree to the authorization.

Signature



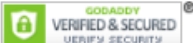
Signature OK. 

Erase Signature

Type Your Name

Alex Admin

Clear Cart Submit Order ▶



If you need to go back a screen, please use the clear cart button. If you have any problems, please reach out to kkoeff@competitivehealth.com or tbell@competitivehealth.com.