



# GroupAccess Administrator's User Guide

## TABLE OF CONTENTS

About This Guide.....	3
About GroupAccess.....	3
Quick-Tip Videos.....	3
Registration.....	4
Sign in .....	5
Change Password .....	6
Forgotten Password or User ID / Password Reset.....	6
Main Menu .....	7
Favorites.....	7
User Profile.....	9
Delegate Authority.....	9
New User ID.....	11
Existing User ID.....	11
Administrator Type .....	12
Primary (PGA) Group Administrators .....	13
Delegated (DGA) Group Administrators .....	13
Third-Party (TPA) Administrators .....	13
Authorized Groups and Divisions .....	14
Permissions .....	15
Activation.....	17
Confirmation .....	18
Editing Permissions .....	19
Drop-Down Box .....	19
Search.....	20

## ABOUT THIS GUIDE

- The first-person words “we, our, us” etc. are used throughout this document to refer to Blue Cross and Blue Shield.
- The second-person words “you, your, them” etc. refer to the Group Administrator.
- This document is optimized for online viewing. All references, including the Table of Contents, will take you directly to the source when you hold down the control (CTRL) key and click on the link.

## ABOUT GROUPACCESS

- When navigating the GroupAccess website, **please do not use the back button** in your browser. Instead, use the back buttons on the screen (if provided) or the breadcrumbs at the top of the page. If you use the browser’s back button, you may be required to start over from the login.



## QUICK-TIP VIDEOS

All users have access to the Quick Tip Videos. Each video is under 3 minutes long and is intended to complement this guide as a visual tutorial. For your convenience, below is a cross-reference between the videos and the corresponding sections of this guide. We recommend viewing at least the GroupAccess Overview tutorial (48 seconds), especially if you are new to GroupAccess.

Quick Tip Video	User Guide Section
GroupAccess Overview	<b><i>We recommend viewing this 48-second video first.</i></b>
How to Register	Registration on page 4
How to Delegate Access	Delegate Authority on page 9
How to Make Changes to a Contract	
How to Make a One Time Payment	
How to Set-Up Recurring Payments	
How to Submit Enrollment Applications	
How to View Group Eligibility Reports	

## REGISTRATION

Welcome to GroupAccess - a secure Internet connection to group insurance administration tools including applications, invoices, payments, and member maintenance. This site is made available to authorized persons of employer-based groups as a convenient method for maintaining your member eligibility records, obtaining your account balance, and paying invoices. **If you have any questions that are not answered in this guide, please let us know. Multiple contact methods can be found on the *CONTACT US* page.**

Figure 1

The screenshot shows the GroupAccess website interface. At the top is a blue navigation bar with the following links: GroupAccess, Health & Dental Plans, Health & Wellness, Forms & Materials, and Find a Doctor. Below the navigation bar is a large image of a woman in a business suit smiling. To the right of the image is the login and registration section. It features the GroupAccess logo and the text "for Employers". Below the logo are two input fields: "USERNAME:" and "PASSWORD:". To the right of each field is a link: "Forgot username?" and "Forgot password?". Below the password field is a checkbox labeled "Remember Username". A yellow button labeled "SIGN IN" is positioned below the "Remember Username" checkbox. Below the "SIGN IN" button is the text "Don't have an account?" followed by a link "Register Now". A blue button labeled "Register Now" is positioned below the "Register Now" link. Below the login and registration section is a "Contact Us" section. It features a blue button labeled "Contact Us" and a link "Contact Us". Below the "Contact Us" button are two links: "Talk to Us" and "Email Us". To the left of the "Contact Us" section is a "Helpful Resources" section. It features a blue header "Helpful Resources" and three links: "GroupAccess Overview Booklet", "GroupAccess Overview Video", and "How to Register for GroupAccess".

If you have not yet registered for GroupAccess, please select the **Register Now** button and complete the registration request form. When you submit your request for a user ID, it will be verified and permissions will be added by the Primary Group Administrator (PGA). Alternately, if there is no PGA registered yet for your group, a BCBSAL Enrollment Services Representative (ESR) will verify the request and add the permissions for you.

**NOTE:** When registering, you can only enter one group number. However, this number has **no bearing** on the groups that you will have access to. It simply links the registration to the GroupAccess system for routing purposes. All necessary groups and divisions can be added during the verification process.

# SIGN IN

Once your user ID is approved and activated, you will receive an email with a temporary, system-generated password. This temporary password is time-sensitive and will expire very soon. If you do not sign in before it expires, we will need to reset your password. When you receive the email, please log in and update your password as soon as possible.

Figure 2

The screenshot shows the GroupAccess sign-in page for employers. At the top, there is a navigation bar with links for GroupAccess, Health & Dental Plans, Health & Wellness, Forms & Materials, and Find a Doctor. The main content area features a large image of a smiling woman in a business suit on the left. On the right, the 'GROUPACCESS for Employers' sign-in form is displayed. The form includes fields for 'USERNAME:' and 'PASSWORD:', each with a 'Forgot' link. Below the password field is a 'Remember Username' checkbox. A yellow 'SIGN IN' button is positioned below the form. At the bottom of the form area, there is a link for 'Don't have an account? Register Now'. The footer contains two columns: 'Helpful Resources' with links to 'GroupAccess Overview Booklet', 'GroupAccess Overview Video', and 'How to Register for GroupAccess'; and 'Contact Us' with links to 'Talk to Us' and 'Email Us'.

## CHANGE PASSWORD

You will be required to change your password when you first sign in. Please note the password requirements at the top of the **Change Password** page.

You can also change your password at any time from the **Update My Online Profile** link on the main menu. See *User Profile* on page 9.

**NOTE:** We will not store your password; however, you will have the opportunity to create a reminder hint that can be emailed to you when needed.

Figure 3

GROUPACCESS > USER PROFILE > CHANGE PASSWORD

CHANGE PASSWORD

Current password requirements will be listed here.

Current Password:

New Password:

Password Strength:

Confirm New Password:

Password Reminder Phrase:

Enter a reminder phrase that you can access if you forget your password. This should be a short phrase (not your password) that reminds you of your password. For maximum security, your phrase should be difficult to guess. For example, your phrase might be "My high school" or "The street that I grew up on".

CHANGE PASSWORD

CANCEL CHANGES

## FORGOTTEN PASSWORD OR USER ID / PASSWORD RESET

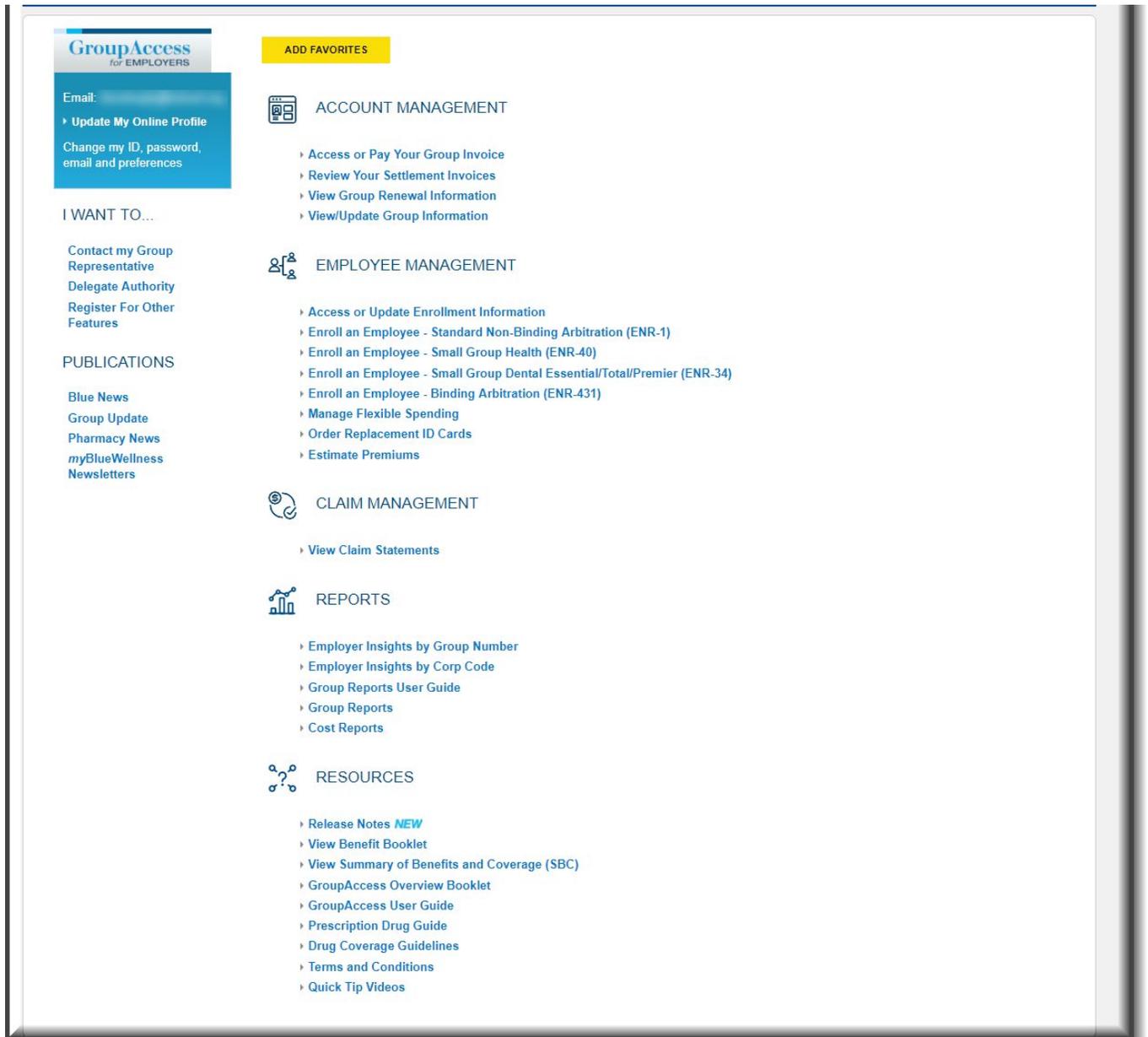
If you forget your user ID or password, there are options on the login page to help you. See Figure 2 on page 5. If you need additional assistance, please contact your Primary Group Administrator (PGA) or an Enrollment Services Representative. You may also send an email from the **Contact Us** page.

**NOTE:** For security purposes, a temporary password is only valid for a couple of hours. You must have access to the email account that is on your GroupAccess profile to successfully reset your password or retrieve your hint.

## MAIN MENU

After you login, you will see the Main Menu. The options here will vary according to your group's specific needs and which permissions you currently have. Therefore, what you see on your menu will probably be different from what you see here.

Figure 4

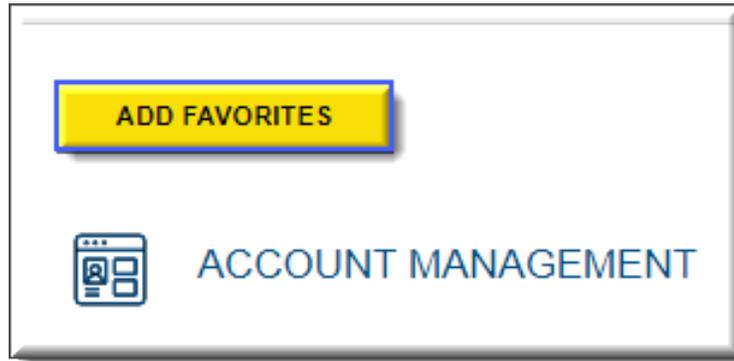


## FAVORITES

GroupAccess has space in the main menu for a Favorites section where you can save your frequently-used components. To create this section, simply click on the **Add Favorites** button at the top of the

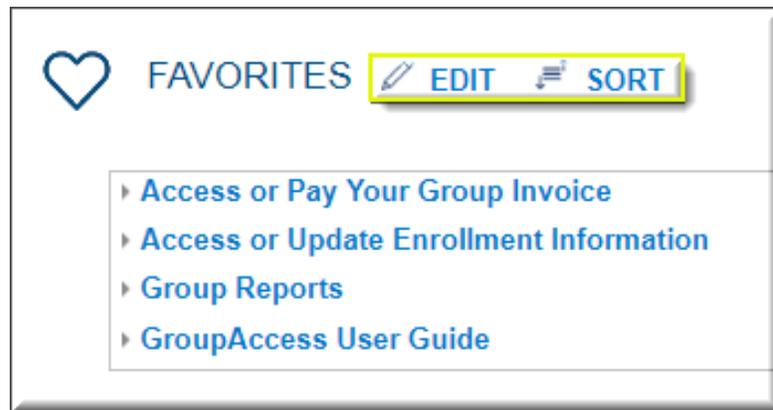
menu and then *Edit* to display a list of available components. You can then select the components that you would like to mark as favorites and click on **Update My Favorites** to save.

Figure 5



Your favorite components will be displayed at the top of the main menu. You can then *EDIT* or *SORT* your favorites by clicking on the links next to the heading.

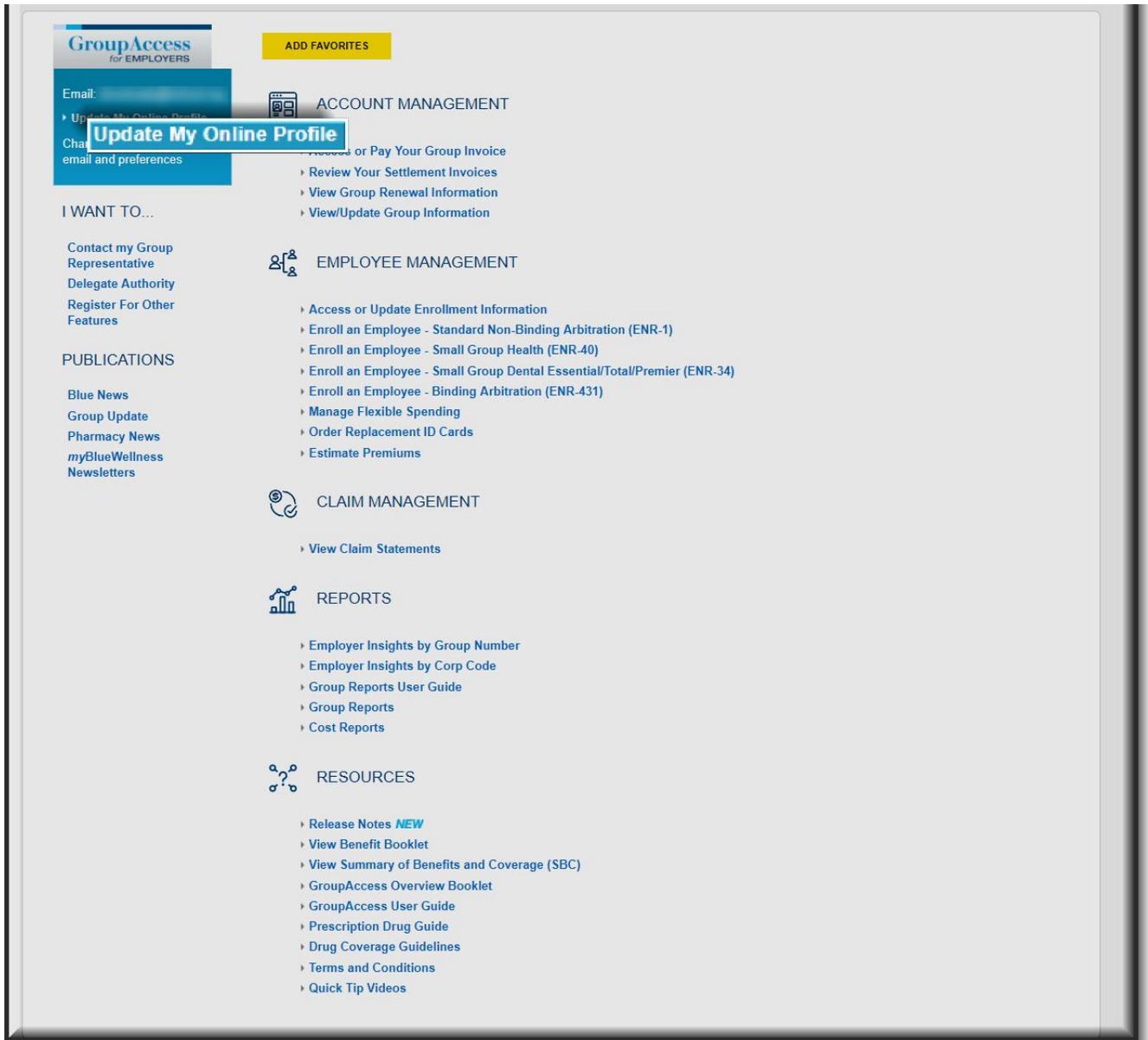
Figure 6



## USER PROFILE

In the **Update My Online Profile** menu, you can update your user ID, password, email address, and other preferences.

Figure 7

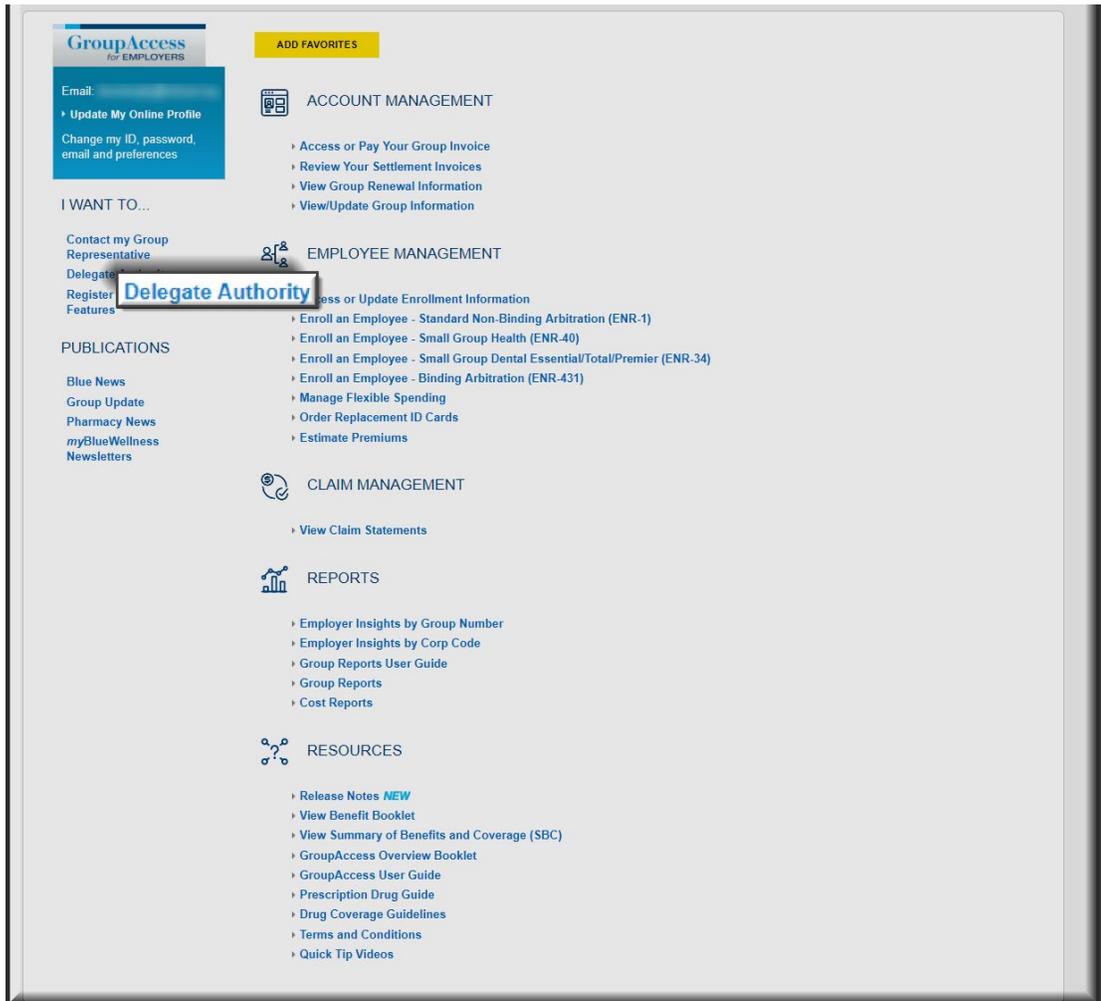


## DELEGATE AUTHORITY

PGAs have the authority to delegate part or all of their access to others. Assuming, then, that you are a PGA, here are the steps to review a new user's registration, add permissions, and activate (or delete) a

new administrator, if desired. The first step, after signing in to GroupAccess, is to select **Delegate Authority** from the Main Menu. The next step depends on whether or not the new user ID has already been created. As previously mentioned, if the user has already created an ID, you will receive an email to notify you of the registration. However, even without the email, you can still view a pending registration, or create a new one yourself. The email is just a prompt to let you know something is waiting for your attention.

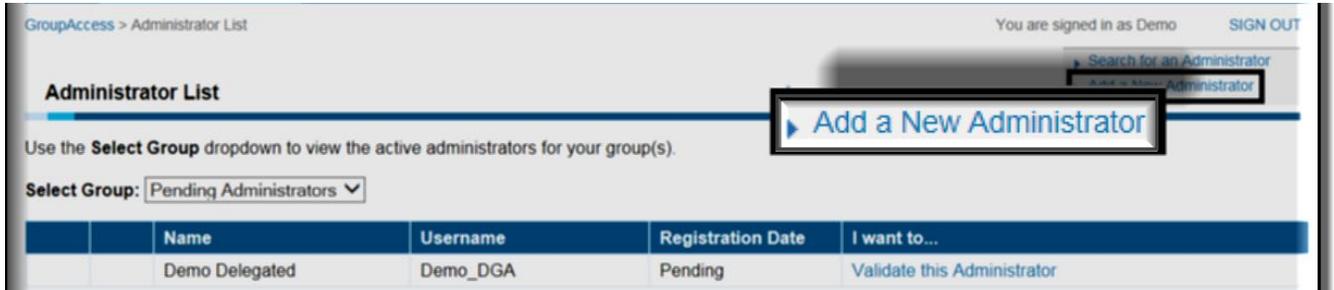
Figure 8



## NEW USER ID

If the new user does NOT have an ID yet, you can choose **Add a New Administrator** and complete the form to register the user ID. (See *Registration* on page 4.) Then you can continue to the next step.

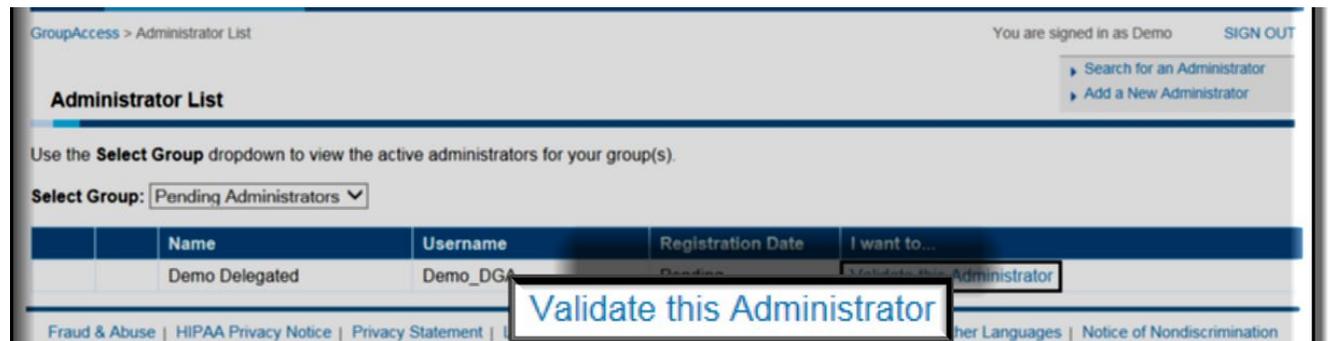
Figure 9



## EXISTING USER ID

If the new user already has an ID, it will be displayed in the Administrator List under *Pending Administrators*. Click **Validate this Administrator** to view the registration details.

Figure 10



## ADMINISTRATOR TYPE

Review the registration details to determine whether or not you want to approve it. To deny the registration, select the red **Delete User** button at the bottom. To continue with the approval process, select the appropriate authority type for this new administrator. **This is very important, so please consider your options carefully.** The differences between the three options for authority are outlined below.

Figure 11

GROUPACCESS > ADMINISTRATOR LIST > ADMINISTRATOR DETAIL

ADMINISTRATOR DETAIL

Please Add Permissions for this Group Administrator: [ADD NEW PERMISSIONS](#)

Status: Pending  
GroupAccess Username: autotest  
Group/Division:  -   
First Name:   
Last Name:   
Telephone:  Ext.:   
Email Address:   
Group Name:   
Supervisor's Name:   
Supervisor's Telephone:  Ext.:

Primary Group Administrator - Group employee with permission to add and delete users, assign and remove permissions, use GroupAccess

Delegated Group Administrator - Group employee with permission to use GroupAccess

Third Party Administrator - Administrator or Consultant to group with permission to use GroupAccess

[SAVE CHANGES](#)

[Delete User](#)

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## PRIMARY (PGA) GROUP ADMINISTRATORS

PGAs are employed by the group. They have the authority to create additional administrators of any level, including PGAs, and delegate their access – in whole or in part. For instance, if the PGA has access to all group divisions, then permission to all divisions can be passed along or just certain division(s). However, if the PGA has access to only one division, then only permission for that one division can be delegated. Further, if the PGA has authority to pay invoices and update enrollment information, then all authority to those two functions can be passed along or just certain parts. PGAs can delegate any permission **that they already have** to whomever they authorize. In the absence of an original PGA, your Enrollment Services Representative can assist with authorization.

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## DELEGATED (DGA) GROUP ADMINISTRATORS

DGAs are employed by the same group as the PGA. DGAs have the authority that was given to them by the PGA. They cannot create new administrators or delegate authority, but are otherwise the same as PGAs. If needed, your Enrollment Services Representative can help set up DGAs, too.

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## THIRD-PARTY (TPA) ADMINISTRATORS

TPAs are not employed by the group. They are employed by an outside company who has a contract with the group to manage the group's insurance benefits or billing in some way. TPA authority works the same as DGA except that they cannot update group information. For your protection, TPAs must be managed by the PGA. **We cannot authorize a TPA in any way.**

All types of administrators can register themselves (see *Registration* on page 4) or be registered by a Primary Group Administrator (PGA). However, only a PGA or an Enrollment Services Representative (ESR) can approve (activate) a registration. When a new user registers, an email request is sent to the PGA. Thus, it is **very important** that the email address in GroupAccess is kept current. When you are ready to add groups for this user to administer, select **Add New Permissions** from the *Administrator Details* page. See *Existing User ID* on page 11.

## AUTHORIZED GROUPS AND DIVISIONS

Once you select *Add New Permissions* you'll add groups and divisions to the new administrator from the options listed. To select multiple divisions in the drop-down box, hold down the CTRL key as you click each one. To select a range of numbers, click on the first one, hold the SHIFT key, and then click on the last one.

**Remember:** You can only delegate permissions that you already have. If any group or division is missing or "grayed out", then additional authority may be needed before it can be delegated.

Figure 12

GroupAccess > Administrator List > Administrator Detail > Permissions

You are signed in as Demo [SIGN OUT](#)

[View Administrator Details](#)

### Permissions

**Administrator:** Demo Delegated  
**Username:** Demo\_DGA  
**Administrator Type:** Delegated Group Administrator  
**Status:** Pending

Select the groups and divisions this Administrator needs access to. You will then be able to add, remove or change permissions for those groups.

<input type="checkbox"/> Select All Groups and Divisions	
<input checked="" type="checkbox"/> 00000A	<input type="radio"/> All Divisions <input checked="" type="radio"/> Specific Divisions 000 001 002 01S 02S
<input type="checkbox"/> 00000B	<input type="radio"/> All Divisions <input type="radio"/> Specific Divisions

[Add Permissions for Selected Groups](#)

When you have finished selecting which groups and divisions you want to share, click **Add Permissions for Selected Groups**.

## PERMISSIONS

Please see the image below. Here you have many options in drop-down boxes to set permissions. As with the Main Menu, what you see depends on your group's specific needs and which permissions you currently have. Your view may differ from what you see here. By default, all switches are initially set to No Access. You can change that by clicking the drop-down box and choosing a more appropriate option. Then click **Submit Changes**.

Figure 13

GroupAccess > Administrator List > Administrator Detail > View Permissions > Add/Edit Permissions You are signed in as Demo [SIGN OUT](#)

### Add/Edit Permissions

**Selected Groups:**

00000A-000  
00000A-001  
00000B-ALL

To make changes to the selected groups, return to the [previous page](#).



## ACTIVATION

After submitting the changes, verify the requested permissions one more time. On this screen, they are shown individually by the group and division that was selected. If everything is correct, click **Activate User** to approve the registration. Otherwise, click **Make Changes to Permissions** and further edit the options as needed.

Figure 14

GROUPACCESS > ADMINISTRATOR LIST > ADMINISTRATOR DETAIL > PERMISSIONS

[View Administrator Details](#)

### PERMISSIONS

Your changes have been saved. Review the permissions below. If correct, please activate the Administrator.

**ACTIVATE USER**

**MAKE CHANGES TO PERMISSIONS**

Administrator: [View Administrator Detail](#)

Username: [View Administrator Detail](#)

Status: [View Administrator Detail](#)

Administrator Type: [View Administrator Detail](#)

Collapse/Expand All Groups and Divisions

Group: 00000A All Divisions

Manage Enrollment:	View and Update
ID Cards:	View and Update
Estimate Cost to Add Employee:	View Only
Group Reports:	View Only
Affordable Care Act Related Reports:	
View Summary of Benefits and Coverage (SBC):	View Only

Group: 00000B Division: 999 **Division-Specific**

Manage Enrollment:	View and Update
Enroll an Employee - Standard Non-Binding Arbitration (ENR-1):	View and Update
ID Cards:	View and Update
Estimate Cost to Add Employee:	View Only
Group Reports:	View Only
View Summary of Benefits and Coverage (SBC):	View Only

Group: 00000C All Divisions

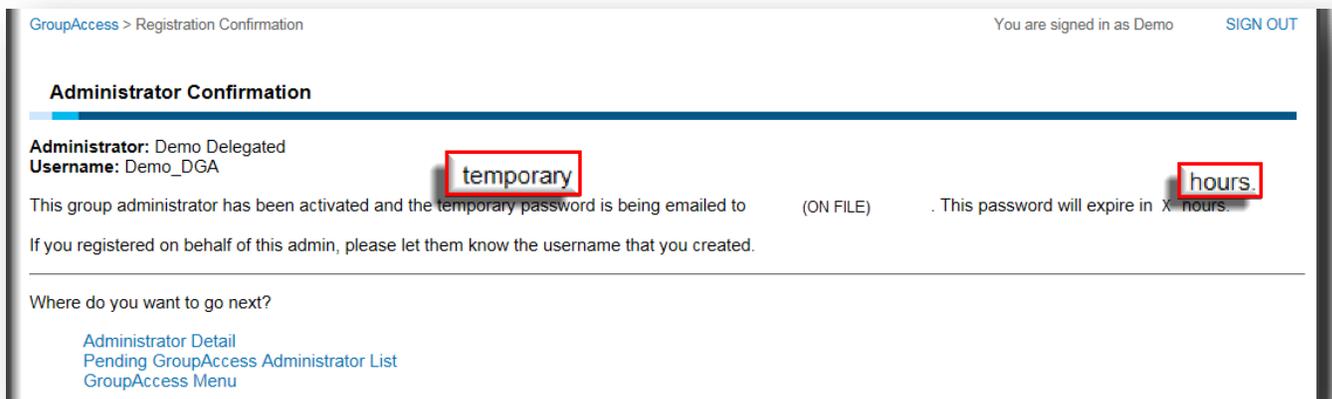
Group Reports:	View Only
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## CONFIRMATION

Once you activate the user, you will get a confirmation message and the new administrator will get a temporary, system-generated password to sign in to GroupAccess the first time. Refer to *Sign in* on page 5, if needed.

**NOTE:** This temporary password will expire very soon. The new administrator should log in and change the password as soon as possible. If the password expires before it is updated, it will have to be reset. See *Forgotten Password or User ID* on page 6.

Figure 15



## EDITING PERMISSIONS

You can also modify an existing user's permissions, but first you have to get to the *Permissions* page. There are two methods to do this and both are outlined next.

### DROP-DOWN BOX

When you go into *Delegate Authority*, use the drop-down box that says *Pending Administrators* to select your group number and all administrators for your group will be displayed. Then click on *Edit this Administrator* to go to the details page.

Figure 16

GroupAccess > Administrator List You are signed in as Demo [SIGN OUT](#)

[Search for an Administrator](#)  
[Add a New Administrator](#)

**Administrator List**

Use the **Select Group** dropdown to view the active administrators for your group(s).

Select Group: 46308

	Name	Username	Registration Date	Link to
<span style="background-color: orange; padding: 2px;">PROXY</span>	Demo Delegated	Demo_DGA	12/27/2017	<span style="border: 1px solid red; padding: 2px;">Edit this Administrator</span>

From the *Administrator Detail* page, click *View Permissions*.

Figure 17

GroupAccess Health & Wellness Forms & Materials Find a Doctor

GROUPACCESS > ADMINISTRATOR LIST > ADMINISTRATOR DETAIL

ADMINISTRATOR DETAIL

Status: Active

GroupAccess Username: demo\_delegated [Reset Password](#)

Group/Division: 00000 - 999

First Name: Demo

Last Name: Admin

Telephone: 123-456-7890 Ext.:

Email Address: admin@ga.com

Group Name: Demo

Supervisor's Name: Primary Admin

Supervisor's Telephone: 123-456-7891 Ext.:

Supervisor's Title: Office Manager

Administrator Type:

- Primary Group Administrator - Group employee with permission to add and delete users, assign and remove permissions, use GroupAccess
- Delegated Group Administrator - Group employee with permission to use GroupAccess
- Third Party Administrator - Administrator or Consultant to group with permission to use GroupAccess

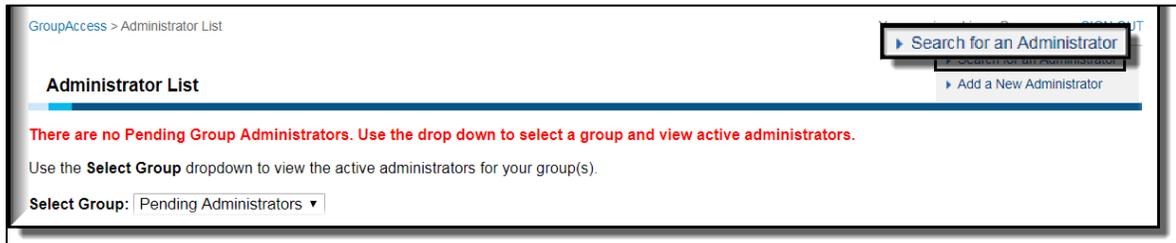
PLEASE SAVE YOUR CHANGES.

Delete User VIEW PERMISSIONS SAVE CHANGES

## SEARCH

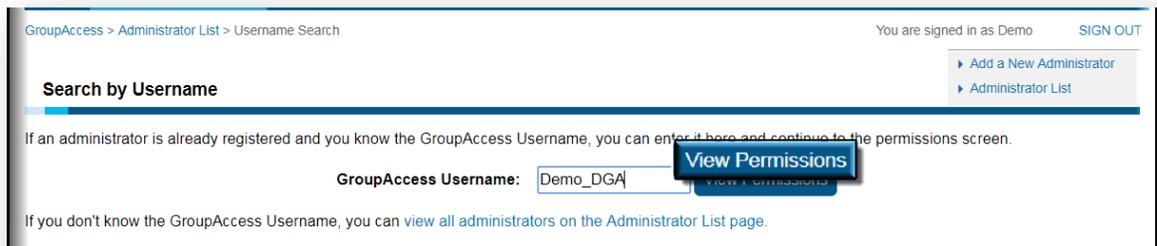
As an alternative to the drop-down box, if you know the user ID, you can use the *Search for an Administrator* link. This is especially helpful if your group has many administrators.

Figure 18



Enter the user ID and click *View Permissions*.

Figure 19



From here, the process for updating permissions is the same for either method, with the exception of activating the user. When you click *Updated Permissions for Selected Groups*, you'll be taken to the familiar permissions screen. (See *Permissions* on page 15.)

Figure 20

