

State Health Plan

eBilling Client Guide



Table of Contents

Table of Contents.....	2
Introduction.....	3
Logging into eBilling	4
Obtaining your Login Information.....	4
Logging in for the First Time.....	4
Changing Your Password.....	5
The eBilling Home Page	6
Tabs	7
Current Invoice Information.....	8
Left Navigation Pane	9
Quick Links.....	9
Viewing Invoices.....	11
Viewing Invoice Details	12
Consolidated and Sub-Group Invoices	12
Paying Invoices	15
Paying Invoices Electronically.....	16
Paying Invoices Manually	20
Printing Invoices	21
Email Notifications	23
Viewing, Creating, and Editing Payment Accounts	24
Creating/Editing Bank Accounts.....	24
Reviewing Payment Accounts Audit Data	26
Auto Draft.....	28
Viewing Payment History	30
Searching for Payments.....	30
Creating and Reviewing Reports	32
Creating and Viewing On-Demand Reports	33
Scheduling Reports.....	36
Invoice Comparison Report.....	38

Introduction

eBilling is a tool provided by BCBSNC in partnership with Benefitfocus that allows HBRs to view and pay their bills quickly, accurately, and securely. This guide outlines the functionality offered by eBilling and how to use it.

Logging into eBilling

Obtaining your Login Information

You will be able to access the eBilling tool by navigating to <https://bcbsnc-shp.secureebilling.com> . If you use the Communications Portal, you will be able to access eBilling from there.

If you already had a username and password, that information will remain the same. To obtain a Username and initial password for the eBilling application, contact BCBSNC by calling 800-245-7319 or e-mailing stateppoinvoice@bcbsnc.com.

Once you click the link from either of the above locations the first time, the State Health Plan eBilling login page displays as seen below..

Logging in for the First Time

BlueCross BlueShield of North Carolina **North Carolina State Health Plan**
FOR TEACHERS AND STATE EMPLOYEES
A Division of the Department of State Treasurer

eBilling

Welcome to State Health Plan eBilling!

The State Health Plan eBilling solution allows the viewing and payment of your premium bills quickly, accurately and securely. Just login and get started, it's that easy.

All State Health Plan premium payments are due on the

Enter your Username and password and click Log in.

Log in to your account

Username*

Password*

Log in

[Forgot your Username? ▶](#)
[Forgot your Password? ▶](#)

Support Hours - 8:30 a.m. to 5:30 p.m. EST Monday through Friday

Officially Supported Browsers
[Microsoft Internet Explorer \(7.0 or later\)](#)
[Mozilla Firefox \(3.5 or later\)](#)

When you log in for the first time, you will be prompted to change your password as shown on the next page.

Changing Your Password

The “Change My Password” window shown below displays the first time you log into eBilling. Complete the following steps to change your password. Note: Your password should be considered personal and confidential.

Change My Password

* = Required Fields

*New Password ?

*Confirm New Password

1. Enter a new password that meets the following criteria:

<i>Password <u>Must</u> Contain:</i>	<i>Password Cannot:</i>
8-15 characters (special characters are permitted but not required)	Be the same as your previous password
At least one capital letter	Have more than two of the same characters in a row
At least one lower case letter	Contain your Username
At least one number	

2. Reenter your password in the Confirm New Password field.
3. Click **Save**.

Note: After you have accessed eBilling once, you will not have to enter in this information again – a single sign on process through the Communications Portal will take you directly to the eBilling home page as shown on the next page of this guide when you click the eBilling link.

The eBilling Home Page

Once you log into the application, the eBilling Home page displays as shown below. The eBilling Home page is the center of the online billing system and allows access to the various tools available in the application.

The Home page includes these elements, which will be discussed in more detail later in this guide:

1. Tabs
2. Current Invoice Information
3. Left Navigation links
4. Quick links

BlueCross BlueShield of North Carolina

North Carolina State Health Plan
FOR TEACHERS AND STATE EMPLOYEES
A Division of the Department of State Treasurer

Home | Billing | Reports | Setup | **1.** | **4.** | My Account | Enroll | Help | Logout

Your last login **3.** /24/2013 at 01:19:51 PM EST

Payments

Search and review your recent payments
Payment History

View your pending payments
Pending Payments

View your payment accounts
Payment Accounts

Scheduled Reports

View your scheduled reports
Scheduled Reports

Create a new scheduled report
Create Report

Your Current 04/30/2013 Invoice

Payment Due **04/30/2013**
Bill Date **04/10/2013**
Billing Period **05/01/2013-05/31/2013**

Amount Due **2.** **\$45,752.00**

Pay Now

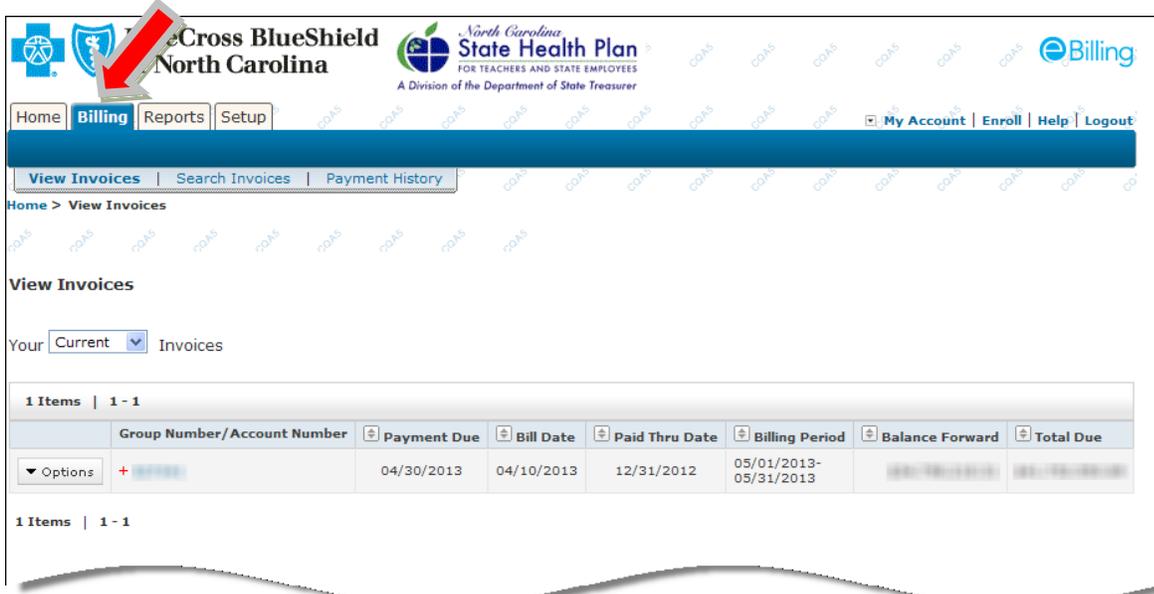
Print Now

View details

Tabs

At the top of the screen, four tabs display. The current tab is highlighted in blue. We will discuss the functions you can perform by accessing these tabs in further detail later in the guide.

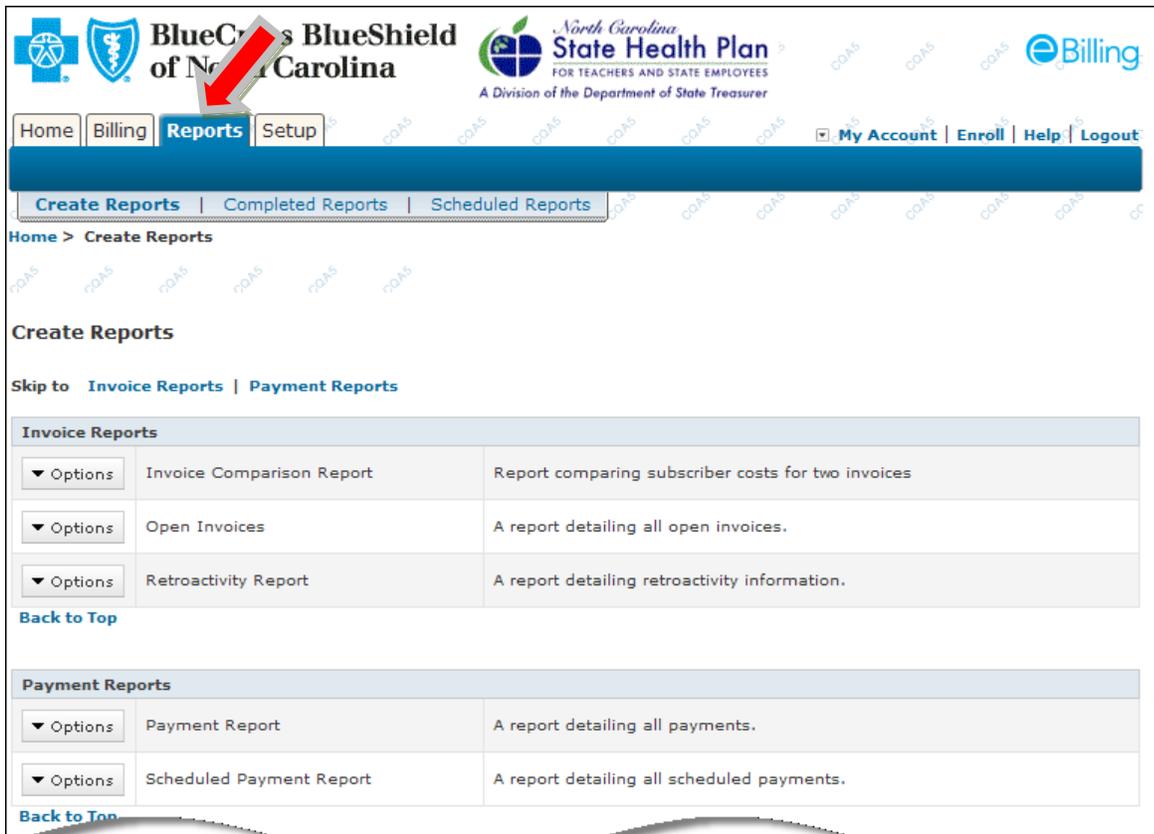
- Home: shown on the previous page.
- Billing: search and view current invoices, search for a specific invoice, and view payment history.



The screenshot shows the 'View Invoices' page. At the top, there are navigation tabs: Home, Billing (highlighted in blue), Reports, and Setup. Below these are links for My Account, Enroll, Help, and Logout. The main content area has sub-tabs: View Invoices, Search Invoices, and Payment History. The page title is 'View Invoices'. Below the title, there is a dropdown menu for 'Your' invoices, currently set to 'Current'. A table displays one invoice item with the following details:

Group Number/Account Number	Payment Due	Bill Date	Paid Thru Date	Billing Period	Balance Forward	Total Due
Options + 04/30/2013	04/30/2013	04/10/2013	12/31/2012	05/01/2013-05/31/2013	000.00	000.00

- Reports: create, view, and schedule reports.



The screenshot shows the 'Create Reports' page. At the top, there are navigation tabs: Home, Billing, Reports (highlighted in blue), and Setup. Below these are links for My Account, Enroll, Help, and Logout. The main content area has sub-tabs: Create Reports, Completed Reports, and Scheduled Reports. The page title is 'Create Reports'. Below the title, there is a 'Skip to' section with links for Invoice Reports and Payment Reports. The page is divided into two sections: Invoice Reports and Payment Reports.

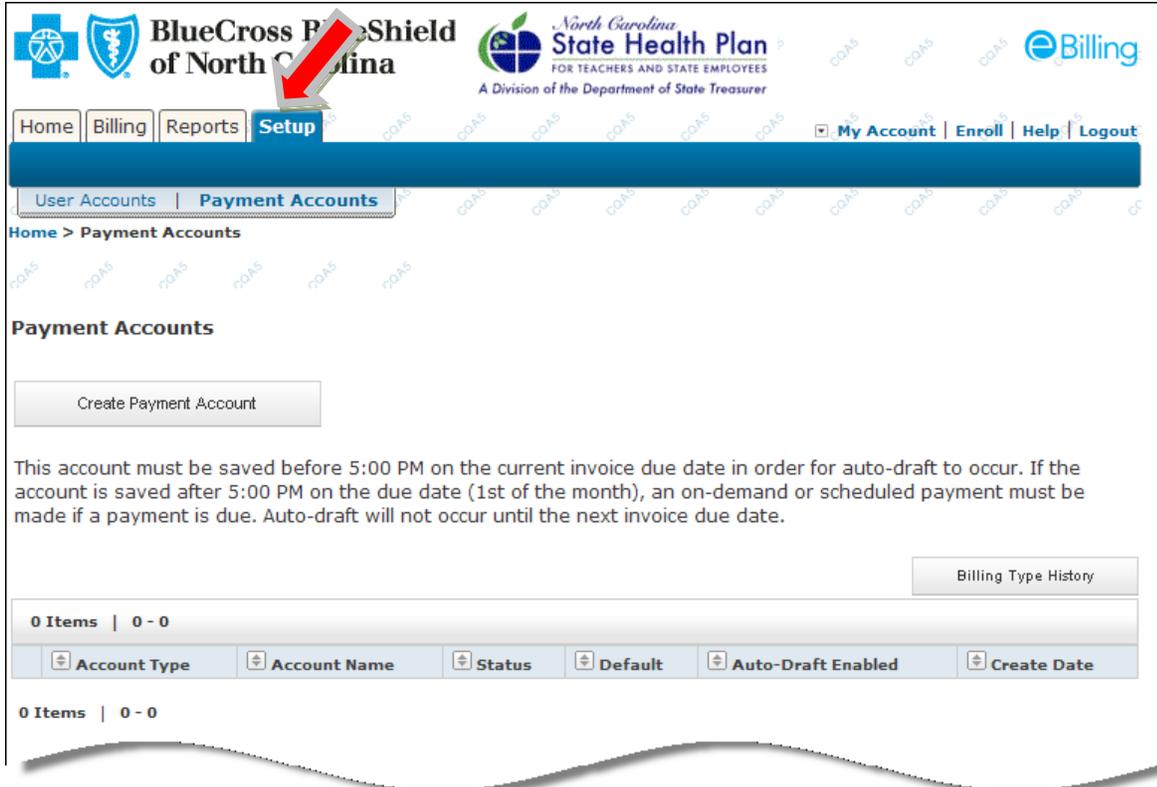
Invoice Reports

Options	Invoice Comparison Report	Report comparing subscriber costs for two invoices
Options	Open Invoices	A report detailing all open invoices.
Options	Retroactivity Report	A report detailing retroactivity information.

Payment Reports

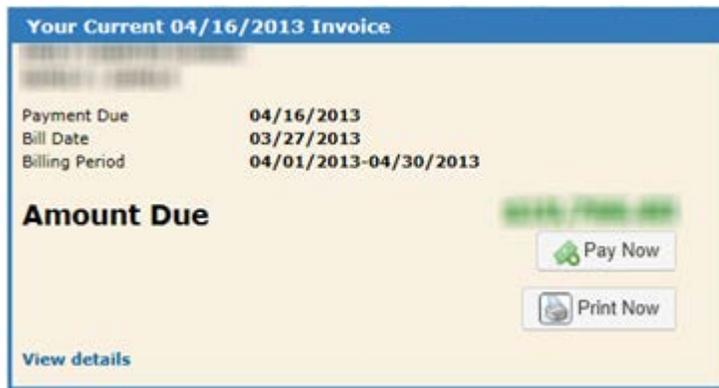
Options	Payment Report	A report detailing all payments.
Options	Scheduled Payment Report	A report detailing all scheduled payments.

- Setup – set up and manage payment accounts.



Current Invoice Information

In the center of the eBilling Home page, current invoice information displays as shown below. From this area, you can see the amount due, pay the current amount due, or print the current invoice.



Important Note: Clicking “Print Now” anywhere in the application takes you to the Print Options screen where you can generate your invoice in a variety of formats. Once the invoice is generated, you may choose to save it to your computer and/or print it. Clicking the Print Now button is the way to create a downloadable version of the invoice. This is covered in more detail in the “Printing Invoices” section of this guide.

Left Navigation Pane

The left side of the eBilling Home page includes the following links:

Payments

Search and review your recent payments
[Payment History](#)

View your pending payments
[Pending Payments](#)

View your payment accounts
[Payment Accounts](#)

Payments section:

- [Payment History](#)
- [Pending Payment](#)
- [Payment Account](#)

Scheduled Reports

View your scheduled reports
[Scheduled Reports](#)

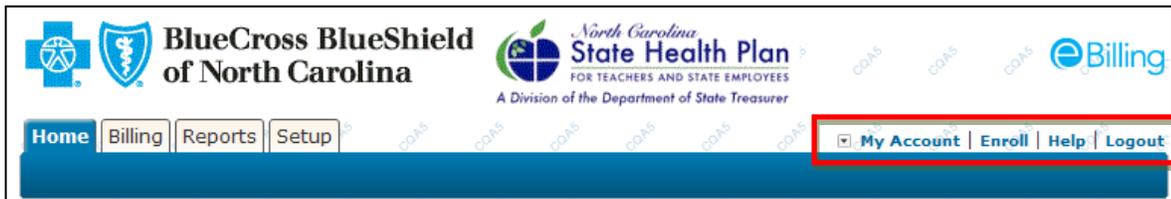
Create a new scheduled report
[Create Report](#)

Scheduled Report section:

- [Scheduled Reports](#)
- [Create Report](#)

These functions will be discussed in later sections.

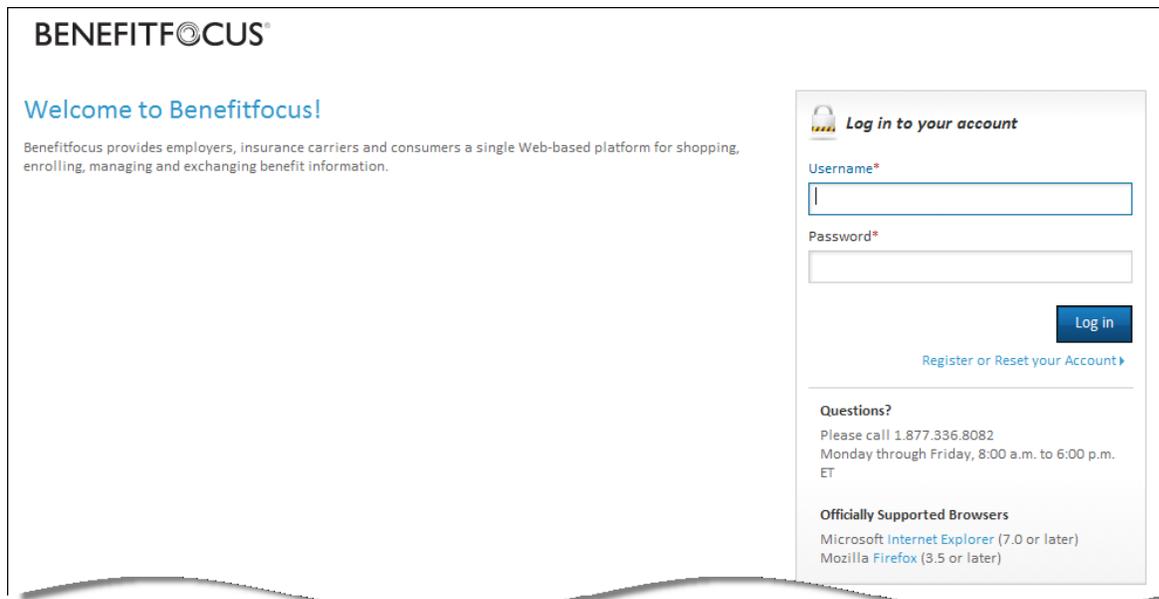
Quick Links



Home | Billing | Reports | Setup | **My Account | Enroll | Help | Logout**

Located at the top right of all eBilling screens, the following links display:

- **My Account:** Change the system password, secret question and answer, and enter or update your e-mail address (shown on page 5 of this guide).
- **Enroll:** Click the link to go to the Benefitfocus enrollment website.



BENEFITFOCUS

Welcome to Benefitfocus!

Benefitfocus provides employers, insurance carriers and consumers a single Web-based platform for shopping, enrolling, managing and exchanging benefit information.

Log in to your account

Username*

Password*

Log in

[Register or Reset your Account](#)

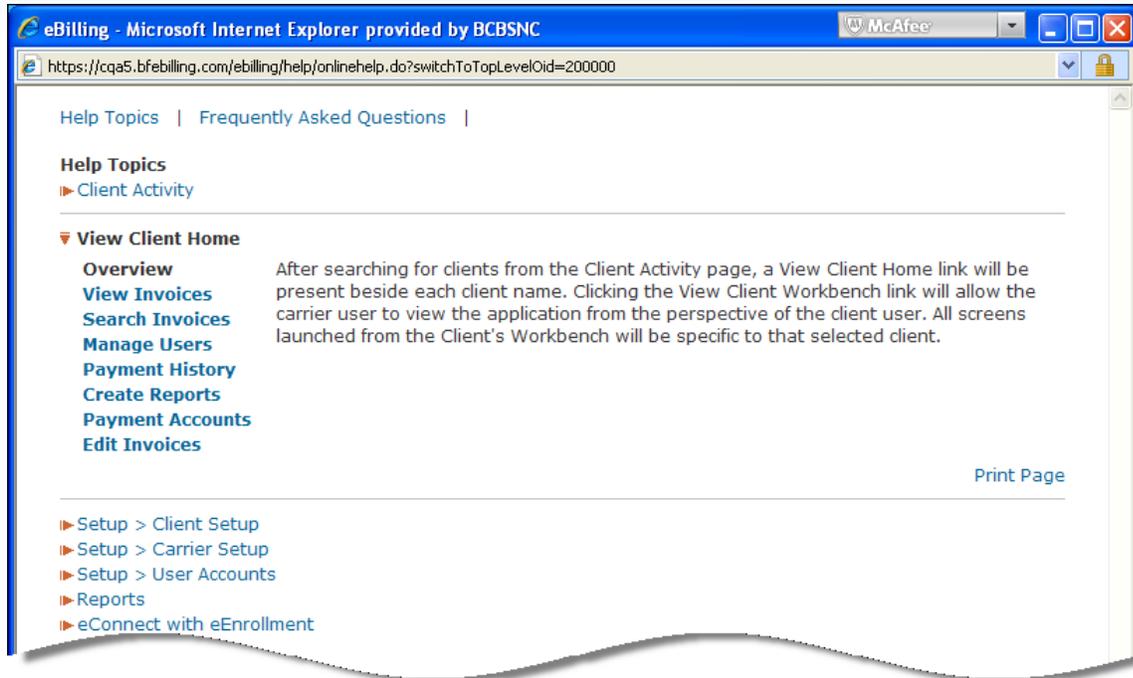
Questions?

Please call 1.877.336.8082
Monday through Friday, 8:00 a.m. to 6:00 p.m.
ET

Officially Supported Browsers

Microsoft [Internet Explorer](#) (7.0 or later)
Mozilla [Firefox](#) (3.5 or later)

- **Help:** View help topics and frequently asked questions. Topics available depend on your access level.



- **Logout:** Click the link to securely log out of the system. The Login screen show on page 4 of this guide displays.

Viewing Invoices

Complete the following steps to view your group's invoices.

From your group's Home Page, click the Billing Tab.

Payments
Search and review your recent payments
Payment History
View your pending payments
Pending Payments
View your payment accounts
Payment Accounts

Scheduled Reports
View your scheduled reports
Scheduled Reports
Create a new scheduled report
Create Report

Your Current Invoice

Payment Due **04/30/2013**
Bill Date **04/10/2013**
Billing Period **05/01/2013-05/31/2013**

Amount Due **\$25,755.00**

Pay Now
Print Now

[View details](#)

The Billing page displays with the View Invoices sub-tab selected as shown below.

This field defaults to "Current." Click the drop down to select "Prior" or "Paid" to view invoices in those categories. Up to 18 months of invoices will be available. See descriptions below.

View Invoices

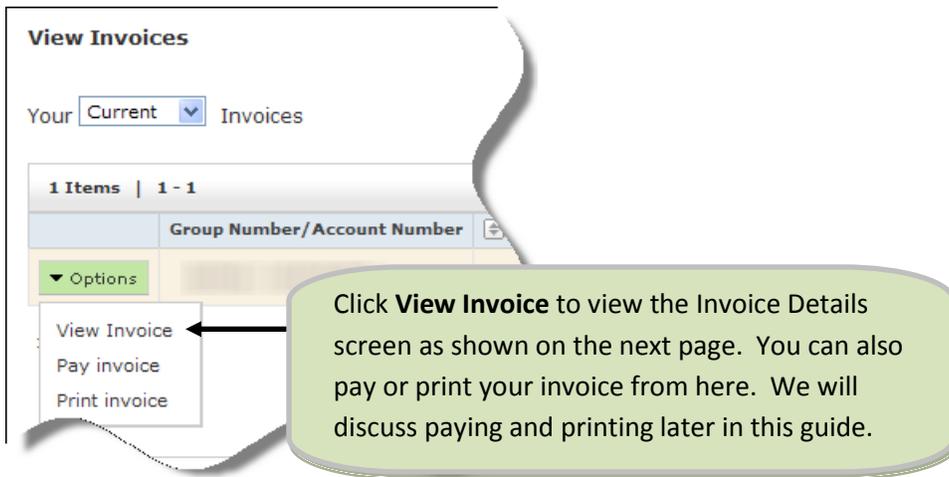
Your **Current** Invoices

Group Number/Account Number	Payment Due	Bill Date	Paid Thru Date	Billing Period	Balance Forward	Total Due
Options + [Account Number]	04/30/2013	04/10/2013	12/31/2012	05/01/2013-05/31/2013	\$25,755.00	\$25,755.00

- Current: All invoices from the current coverage period that do not have a payment applied to them.
- Prior: All invoices from a previous coverage period and do not have a payment applied to them.
- Paid: All invoices that have payments applied to them.

Viewing Invoice Details

The Options dropdown allows you to take further action regarding the account or sub-account.



View Invoices

Your **Current** Invoices

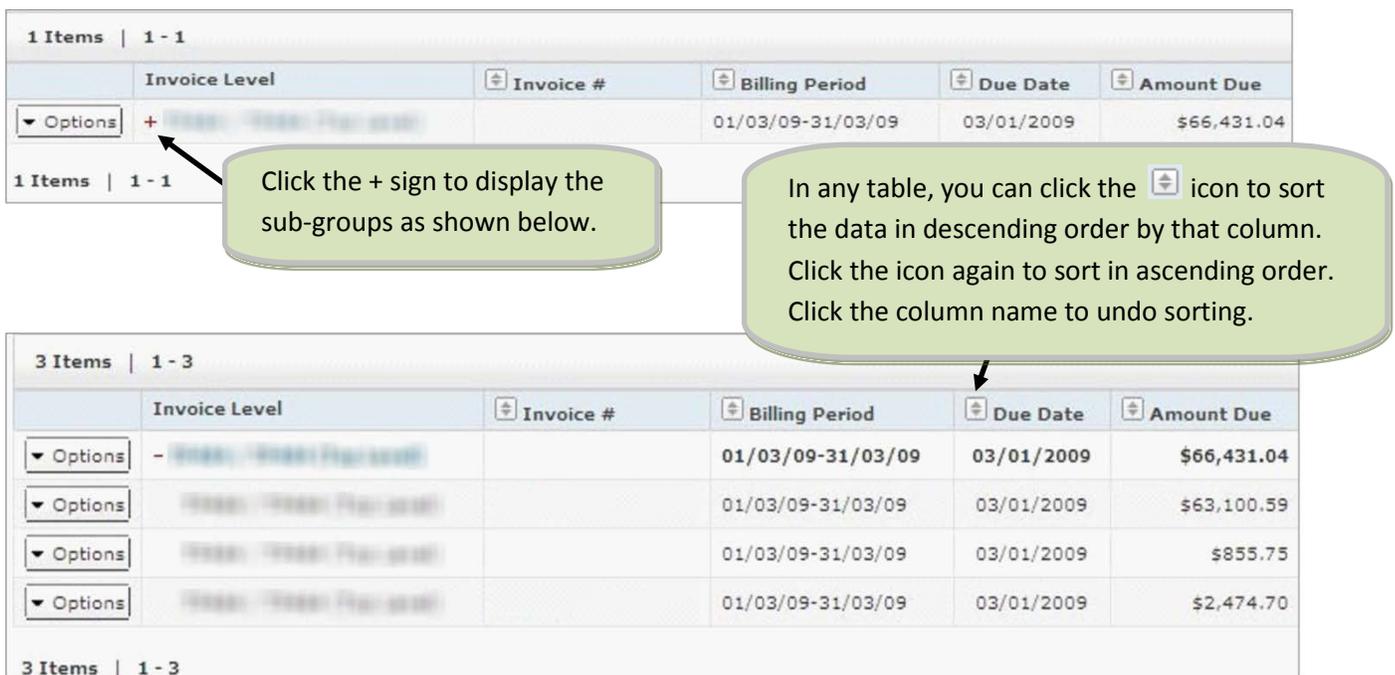
1 Items | 1 - 1

Group Number/Account Number
▼ Options
View Invoice
Pay invoice
Print invoice

Click **View Invoice** to view the Invoice Details screen as shown on the next page. You can also pay or print your invoice from here. We will discuss paying and printing later in this guide.

Consolidated and Sub-Group Invoices

Consolidated invoices contain multiple sub-group invoices rolled into one overall group invoice. Invoices are consolidated for convenience and to display a summary of all of the invoices for a particular billing period. Consolidated invoices are denoted by a (+) sign by the invoice name.



1 Items | 1 - 1

Invoice Level	Invoice #	Billing Period	Due Date	Amount Due
▼ Options + Consolidated Invoice		01/03/09-31/03/09	03/01/2009	\$66,431.04

1 Items | 1 - 1

Click the + sign to display the sub-groups as shown below.

In any table, you can click the  icon to sort the data in descending order by that column. Click the icon again to sort in ascending order. Click the column name to undo sorting.

3 Items | 1 - 3

Invoice Level	Invoice #	Billing Period	Due Date	Amount Due
▼ Options - Consolidated Invoice		01/03/09-31/03/09	03/01/2009	\$66,431.04
▼ Options		01/03/09-31/03/09	03/01/2009	\$63,100.59
▼ Options		01/03/09-31/03/09	03/01/2009	\$855.75
▼ Options		01/03/09-31/03/09	03/01/2009	\$2,474.70

3 Items | 1 - 3

The Invoice Details screen displays with the **Financial Totals** tab selected as shown below.

BlueCross BlueShield of North Carolina **North Carolina State Health Plan**
FOR TEACHERS AND STATE EMPLOYEES
A Division of the Department of State Treasurer

Home | **Billing** | Reports | Setup | My Account | Enroll | Help | Logout

View Invoices | Search Invoices | Payment History

Home > View Invoices > Invoice Details

Invoice Details

Financial Totals | Summary | Details | Retroactivity

Quick Links
Pay invoice | Print invoice

Group Name: [Redacted] Group Number: [Redacted] Billing Period: 05/01/2013-05/31/2013
Address: [Redacted] Bill Date: [Redacted] Due Date: 04/30/2013
Paid Thru Date: [Redacted] Total Amount Due: [Redacted]

Financial Totals

Original Totals		
INVOICE TOTAL		
BALANCE FORWARD		
TOTAL AMOUNT DUE		

The Invoice Total, Balance Forward, and Total Amount Due display here.

The Details tab displays all the subscribers covered by the invoice. If your group has more than 2500 subscribers, they will not display here. Instead, you will see the message “The request yielded more than 2500 members so details are not displayed. To export all member records use the Print Invoice button or use the search criteria below to view members online.” See “Printing Invoices” in this guide for more information.

BlueCross BlueShield of North Carolina **North Carolina State Health Plan**
FOR TEACHERS AND STATE EMPLOYEES
A Division of the Department of State Treasurer

Home | **Billing** | Reports | Setup | My Account | Enroll | Help | Logout

View Invoices | Search Invoices | Payment History

Home > View Invoices > Invoice Details

Invoice Details

Financial Totals | Summary | **Details** | Retroactivity

Quick Links
Pay invoice | Print invoice

Group Name: [Redacted] Group Number: [Redacted] Billing Period: 05/01/2013-05/31/2013
Address: [Redacted] Bill Date: [Redacted] Due Date: 04/30/2013
Paid Thru Date: [Redacted] Total Amount Due: [Redacted]

Details

Find By: Please Select | Search | Reset

4435 Items | 1 - 20 | Advanced Sorting

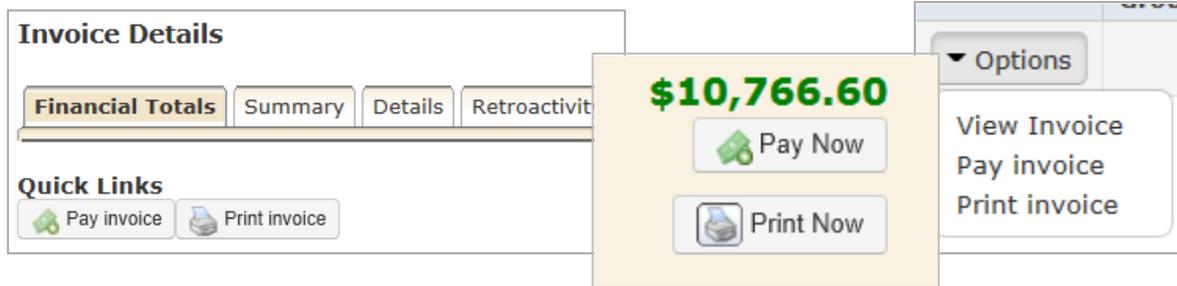
	Account Number	Account Name	Subscriber Id	Last Name	First Name	MI	Employee Status	From	Thru	Benefit Package	Tier	Employer Amount	Employee Amount	Total Charges
Options	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
Options	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
Options	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
Options	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
Options	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
Options	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]

The Retroactivity tab displays a list of members who have billing activity applicable to a month other than the current month. For example, a member whose coverage level changed effective April 1st but the change was not reflected in the April invoice because it was not entered into the system until April 15th.

The screenshot shows the BlueCross BlueShield of North Carolina website interface. At the top, there are logos for BlueCross BlueShield of North Carolina and North Carolina State Health Plan for Teachers and State Employees. Navigation tabs include Home, Billing, Reports, and Setup. A secondary navigation bar contains View Invoices, Search Invoices, and Payment History. The main content area is titled 'Invoice Details' and has sub-tabs for Financial Totals, Summary, Details, and Retroactivity (which is selected). Below the tabs are 'Quick Links' for Pay Invoice and Print Invoice. A summary section displays Group Name, Address, Group Number, Bill Date, Billing Period (05/01/2013-05/31/2013), Paid Thru Date, Due Date (04/30/2013), and Total Amount Due. A 'Retroactive Adjustments' section includes a search filter with a dropdown set to 'Please Select' and buttons for Search and Reset. Below the search is a table with 8870 items, showing columns for Account Number, Account Name, Subscriber Id, Last Name, First Name, MI, Employee Status, Payroll No, From, Thru, Benefit Package, Tier, Employer Amount, Employee Amount, and Total Charges. The table content is blurred.

Paying Invoices

There are multiple ways to access the screens to pay invoices. You can select Pay Invoice from the home screen, Pay Invoice from the drop-down menu on the View Invoices screen (for both consolidated and non-consolidated invoices); or, you can select the Payment button on the Invoice Details screen.

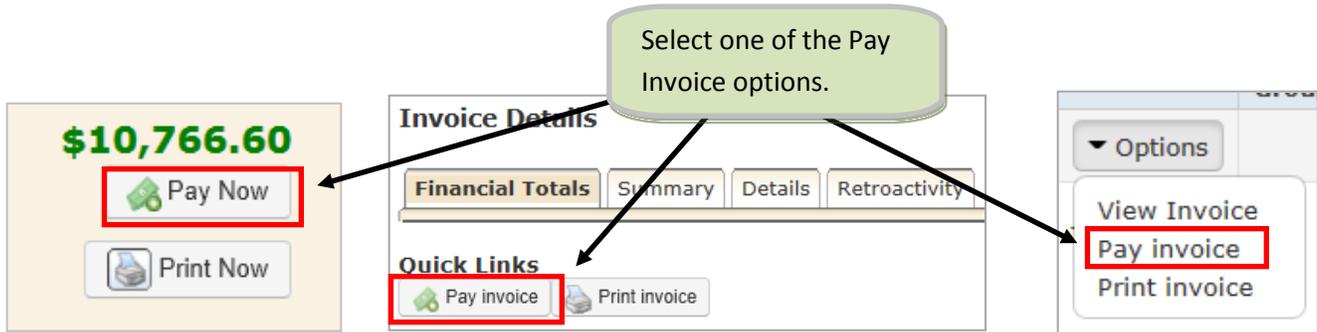


Important Reminders:

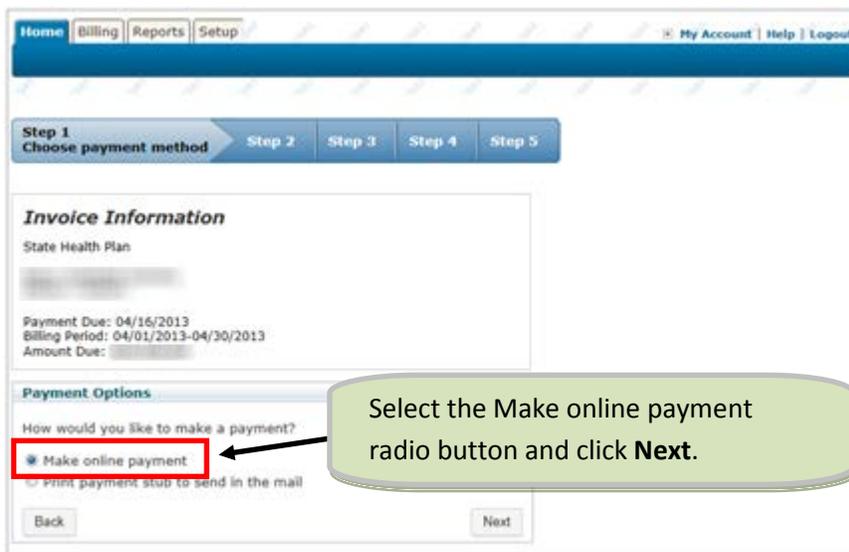
- Payments are always due on the first of the month, regardless of when the invoice is generated.
- The State Health Plan operates on a pre-pay basis. That means premiums paid on the first of the month (on May 1st, for example) are for that month (the coverage period May 1st – May 31st).
- The key to managing your group's premium is to maintain current eligibility and to manage any discrepancies in a timely manner using the tools available; for example, the Retroactivity tab and Invoice Comparison report in the eBilling tool as well as your payroll system.
- The longer a discrepancy goes uncorrected, the more difficult it becomes to identify.
- Failure to pay the total amount due by the payment due date will result in delinquency.
- Delinquencies are escalated as follows:
 - If the invoice is not paid by the end of the first week of the effective month, the delinquency is escalated to the primary HRB contact at the agency.
 - If the invoice is not paid by the end of the third week of the effective month, the delinquency is escalated to the Chief Financial Officer of the employing unit.
 - If the invoice is not paid by the end of the effective month, the delinquency is escalated to the Chief Financial Officer, Department of Public Instruction, UNC General Administration, and/or the North Carolina Community College's Division of Business and Finance.

Paying Invoices Electronically

Complete the following steps to pay your invoice.



The Step 1 Choose payment method window displays.



Depending on your permissions, you will see one of the following:

Step 2 Choose payment account...

or Step 3 – Choose amount & date.

Step 1 Step 2 **Choose payment account** Step 3 Step 4 Step 5

Invoice Information
 State Health Plan
 Payment Due: 04/16/2013
 Billing Period: 04/01/2013-04/30/2013
 Amount Due: \$1,100.00

Payment Accounts
 You have these accounts on file. Do you want to use one of these preexisting accounts or would you like to add another account?

I'd like to use : HR Adminm Bank Account [edit account](#)
 New Account

At Step 2, choose the payment account for the payment and click **Next**. Step 3 Choose amount & date displays as shown below.

Step 1 Step 2 Step 3 **Choose amount & date** Step 4 Step 5

Invoice Information
 State Health Plan
 Payment Due: 04/30/2013
 Billing Period: 05/01/2013-05/31/2013
 Amount Due: \$1,100.00

At Step 3, click **Total Amount Due** and choose the Date of Payment; then click **Next**.

Choose Payment Amount

Paying with: ABC [change account](#)

Total Amount Due \$1,100.00
 Balance Forward \$1,100.00

Date of Payment

All payments made after 2:00 PM EST will be sent to the bank on the following business day.

Payment options include:

- Total Amount Due – The total amount of the invoice will be paid from the designated account. This includes any previously unpaid balance forward amounts.
- Balance Forward – The total past due amount will be paid from the designated account.
- Updated Total Due – The total updated amount will be paid from the designated account. This displays when an amount other than the total amount due was applied after the invoice was generated.

Step 4 Confirm information displays as shown below.

Confirm Information

Payment Account: [HR Adminm Bank Account](#) [change account](#)
Amount of Payment: **\$10,766.60** [edit payment amount](#)
Payment Date: **04/01/2013** [change payment date](#)

[Review invoice payment information details](#)

Payment Authorization

Please read the following legal notice. If you agree with the terms and conditions therein, click the box to indicate your authorization for the North Carolina State Health Plan (NCSHP), and/or its vendor, Blue Cross and Blue Shield of North Carolina (BCBSNC), to make the above scheduled or withdrawals of funds from your designated bank account. I am an authorized user of this bank account. As a convenience to me, I hereby request and authorize NCSHP and/or BCBSNC to initiate the charge to this bank account payable to the order of NCSHP or BCBSNC. I agree that NCSHP's and/or BCBSNC's rights in respect to each bank draft shall be the same as if it were a check drawn on this bank account, and signed by an authorized person. I understand the amount to be drawn and the date for the amount to be drawn are listed above. I also authorize the financial institution to reduce the balance of this bank account by the amount of the bank draft.

Authorization Date: 04/01/2013 01:52:34 PM ET

Please [print](#) this screen for your records

All payments made after 2:00 PM EST will be sent to the bank on the following business day.

[Back](#) [Submit Payment](#)

Review the transaction and acknowledge the payment authorization. When you are ready to finalize the payment, click **Submit Payment**.

The Confirmation window displays including a tracking number. You can print this page for your records.

At the end of the day on the date of payment you selected, you will receive an email confirming that the payment has been submitted.

Confirmation

Thank You!



Your payment has been successfully submitted. Please allow for 2-3 business days for your payment to be processed.

Your tracking number is **69426**

Account Name: test*2345
Payment Date *: 04/01/2013
Total Amount Paid : \$20,334,008.64

Please [print](#) this screen for your records

[Review invoice payment information details](#)

Want to save time in the future? [Enable Auto Draft](#)

[Return to Home](#)



Important Note: After making a payment, when you return to the home page, you will still see the current invoice information as shown below. This “current invoice” information will continue to display on the home page for 2-3 business days until the payment is fully processed. **Do not pay the invoice again!** The payment will show as Pending until 5:00 p.m. on the business day the payment was initiated. You can access this information via the Pending Payments link on the left navigation pane of the home page. You can also use the tracking number provided in the confirmation message to search for payments as described on page 29 of this guide.

The screenshot displays a web page titled "Your Current 04/16/2013 Invoice". It contains the following information:

Payment Due	04/16/2013
Bill Date	03/27/2013
Billing Period	04/01/2013-04/30/2013

Amount Due \$245,788.00

Buttons: [Pay Now](#) (with a green checkmark icon) and [Print Now](#) (with a printer icon).

[View details](#)

Paying Invoices Manually

1. Click the Print Payment Stub radio button from the Payment Options screen and Click **Next**.

Payment Options

How would you like to make a payment?

Make online payment
 Print payment stub to send in the mail

2. If there are multiple invoices to choose from, select the invoice(s) you want to pay and Click **Next**. If there is only one invoice, just click **Next**.

Note: The **Total Due** for the **Current** invoice includes any unpaid balance forward amounts.

Manual Payment

Print the payment stub

Print a payment stub for the invoice(s) selected below.

1 Items

Invoice Status	Payment Due	Invoice Level	Total Due	Bill Date	Billing Period
Current	04/16/2013	SEMILY / SEMILY	\$10,766.60	03/27/2013	04/01/2013-04/30/2013

1 Items

3. The invoice payment stub displays in a new window. Print the stub and submit it.

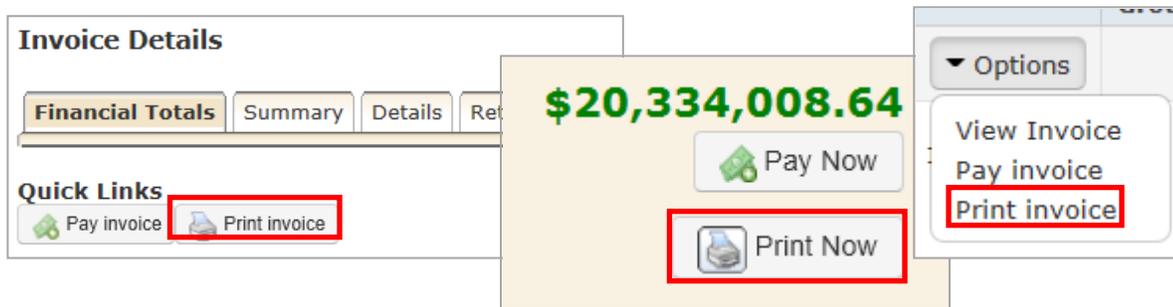
Group Number	SEMILY	Bill Date	03-27-2013
Account Number	SEMILY	Payment Due	04-16-2013
Payment Covers		Total Due	\$10,766.60
04-01-2013 - 04-30-2013			
		Write Amount Paid Here	

REMIT PAYMENT TO THIS ADDRESS:
 Blue Cross and Blue Shield of North Carolina
 PO Box 580031
 Charlotte, NC 28258-0031

Printing Invoices

There are multiple ways to access the screens to print invoices. You can select Print Invoice from the Home screen, Print Invoice from the drop-down menu on the View Invoices screen (for both consolidated and non-consolidated invoices); or, you can select the Print icon on the Invoice Details page. You can print invoices in PDF format or as comma-separated value (CSV) files (which can be opened in Microsoft Excel, for example). An HTML format is also available to either view in your web browser or to print.

Important Note: Clicking “Print Now” anywhere in the application takes you to the Print Options screen where you can generate your invoice in a variety of formats. Once the invoice is generated, you may choose to save it to your computer and/or print it. Clicking the Print Now button is the way to create a downloadable version of the invoice.



Regardless of where you select to print invoices, the Print Options screen opens. You can print complete invoices or sections from the invoices and specify the invoices to print (if you selected the consolidated view). All invoices with a Current, Prior, and Paid status can be printed and exported.

1. After accessing the Print Invoice screen, select the type of format* you want to print and, if there are multiple invoices, select the invoice(s) to print and select the sorting order for each selection. Then click **Print** to generate the report.

Print Options

What format would you like for this report? PDF

There are **1 invoices** selected to print. [select invoices](#)

Choose the invoice sections to include in this report:

Summary
 Financial Totals
 Details
 Retroactivity

Sort By Order Subtotal by sorted column
Then By Order Subtotal by sorted column
Sort By Order Subtotal by sorted column
Then By Order Subtotal by sorted column

* **Note about formats:** The following guidelines can assist you in choosing the best output format for your purposes:

- CSV: best for sorting and manipulating data as well as exporting into other applications.
- PDF: best for printing
- HTML: best for viewing information online when printing is not needed

2. While the invoice is generating, the status displays, “Running” as shown below. Depending on the size and complexity of the report, it may take a few moments to generate the results. Click **Refresh** to determine if the report is ready to be downloaded.

Completed Reports

1 Items | 1 - 1

<input checked="" type="checkbox"/> Status	Date	Report Name	Criteria	Size
RUNNING	04/25/2013 01:50:21 PM ET	Export / Print Invoice Report	Format: PDF	0 Kb

1 Items | 1 - 1

Please note: Reports older than 7 days will be automatically deleted.

- Once the report is available, the status changes to **Complete**. Select **Download** from the drop-down menu to generate the report in the format you selected.

Completed Reports [Refresh](#)

1 Items | 1 - 1

	Status	Date	Report Name	Criteria	Size
Options	COMPLETE	03/19/2013 03:25:38 PM ET	Export / Print Invoice Report	Format: PDF	618 Kb

Download
Delete

Reports older than 7 days will be automatically deleted.

Email Notifications

Email addresses are collected as part of the registration process for HBRs with billing access. It is important to register new users promptly when billing personnel at your agency changes to ensure these email notifications are received.

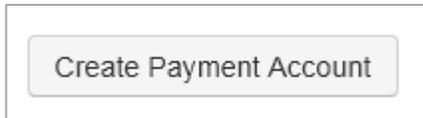
You will receive email notifications for the following scenarios:

- New Invoice: alerts you when new invoices are available for you to view.
- Online Payment: alerts you when an online payment has been made in eBilling.
- Returned Payment: alerts you when your payment has been returned from its bank.
- Delinquency (Warning): notifies you that your account has reached the first stage of delinquency due to unpaid premiums.

Viewing, Creating, and Editing Payment Accounts

Creating/Editing Bank Accounts

1. Select Payment Accounts from the Setup tab to add and edit all accounts used to pay invoices online.
2. To create a new bank account, go to Step 2a. To edit a current account, go to Step 2c.
 - a. Select Create Payment Account at the top of the Payment Accounts page to display the Account Information tab.



- b. Enter all required Bank Account information.

Create Payment Account

Basic Information

* = Required Fields

Bank Account Information

This account must be saved before 5:00 PM on the current invoice due date in order for auto-draft to occur. If the account is saved after 5:00 PM on the due date (1st of the month), an on-demand or scheduled payment must be made if a payment is due. Auto-draft will not occur until the next invoice due date.

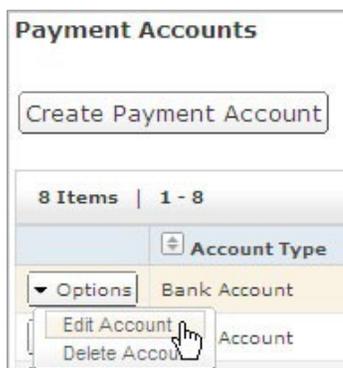
Account Name Customized name for identifying the account

Bank Name*

City

State / Province

- c. Select Edit Account from the drop-down menu for any account you need to update; the Account Information tab displays the current account information.



3. Enter/Edit account information (required fields are indicated with *) on the Account Information tab.

Create Payment Account

Basic Information

* = Required Fields

Bank Account Information

This account must be saved before 5:00 PM on the current invoice due date in order for auto-draft to occur. If the account is saved after 5:00 PM on the due date (1st of the month), an on-demand or scheduled payment must be made if a payment is due. Auto-draft will not occur until the next invoice due date.

Account Name Customized name for identifying the account

Bank Name*

City

State / Province

Country Code

Account Type*

Account Holder*

Routing Number*

Account Number*

Confirm Account Number*

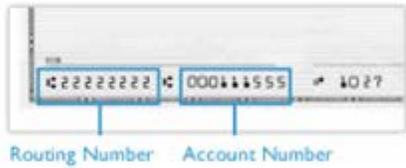
Auto-Draft Please read the following legal notice. If you agree with the terms and conditions therein, click the box to indicate your authorization for the North Carolina State Health Plan (NCSHP), and/or its vendor, Blue Cross and Blue Shield of North Carolina (BCBSNC), to make monthly withdrawals of funds from your designated bank account.

I am an authorized user of this bank account. As a convenience to me, I hereby request and authorize recurring monthly bank drafts (Auto-draft). The monthly bank drafts will be for the amount invoiced by NCSHP and/or BCBSNC and will be drawn on the first of each month. NCSHP and/or BCBSNC may try up to two times to draw the invoiced amount from this account. I agree that if such charges be dishonored, whether with or without cause and whether intentionally or inadvertently, NCSHP and BCBSNC shall have no liability whatsoever even though dishonor results in forfeiture of insurance. This authorization will remain in effect until I revoke it through this web site.

Auto-Draft Authorization Date

Account Options

Make this my default payment account



If this will be the default account for making payments for your group, check the “Make this my default payment account” checkbox. When you have entered all information, click **Save** to finish creating the account.

Reviewing Payment Accounts Audit Data

The Payment Accounts tab features an Audit History. Both carrier and client users (with security access) will have access to view this information.

When users edit a payment account, they will be able to select the History button to view:

- The Login ID of the last person to make changes
- The date and time of the last change made to a payment account

To see the history for any available payment account:

1. Select Payment Accounts from the Setup tab to add and edit all accounts used to pay invoices online.



2. Select Edit Account from the drop-down menu.

1 Items 1 - 1						
	Account Type	Account Name	Status	Default	Auto-Draft Enabled	Create Date
Options	Bank Account	HR Adminm Bank Account	Enabled		No	04/01/2013
View/Edit Account Delete Account						

3. Select the History button at the top right of the screen.



4. Select View from the drop-down menu for the record.

Account History			
	Last Edit Date	Last Edit Time	Last Edit By
Options	04/01/2013	01:49:41 PM	CLONGEMILY
View	01/2013	01:48:18 PM	CLONGEMILY

5. Select Back to review other records for this account, or select Close Window to return to the Edit Account Payment screen.

Account History ✕		
Field	Old Value	New Value
Account Name	HR Adminm Bank Account	HR Adminm Bank Account
Bank Name	Bank of USA	Bank of USA
City		
State / Province		
Country Code		
Account Type	Checking	Checking
Account Holder	Caroline LOnG	Caroline LOnG
Routing Number	053904483	053904483
Account Number	*2345	*2345
Account Use	false	false
Default Account	true	true
Enabled	true	true
Auto Draft Authorization	true	true
Effective Date	04/01/2013	04/01/2013

[Back](#)

Auto Draft

There are several ways to set up automatic drafts depending on your permissions:

BlueCross BlueShield of North Carolina

North Carolina State Health Plan FOR TEACHERS AND STATE EMPLOYEES A Division of the Department of State Treasurer

eBilling

Home | Billing | Reports | **Setup** | My Account | Enroll | Help | Logout

Payment Accounts

Home > Payment Accounts

Payment Accounts

Create Payment Account **2.**

This account must be saved before 5:00 PM on the current invoice due date in order for auto-draft to occur. If the account is saved after 5:00 PM on the due date (1st of the month), an on-demand or scheduled payment must be made if a payment is due. Auto-draft will not occur until the next invoice due date.

Billing Type History

1 Items | 1 - 1

Account Type	Account Name	Status	Default	Auto-Draft Enabled	Create Date
Bank Account	ABC	Enabled	*	No	04/25/2013

Options: View/Edit Account **1.**
Delete Account

1. For an existing payment account, go to the Setup tab, then click View/Edit Account as shown below.
2. Set up a new payment account by accessing the Setup tab and clicking Create Payment Account.

3. Complete the fields of the Create Payment Account screen.

Create Payment Account

Basic Information

* = Required Fields

Bank Account Information

This account must be saved before 5:00 PM on the current invoice due date in order for auto-draft to occur. If the account is saved after 5:00 PM on the due date (1st of the month), an on-demand or scheduled payment must be made if a payment is due. Auto-draft will not occur until the next invoice due date.

Account Name: HR Account Customized name for identifying the account

Bank Name*: Bank of ABC

City: [Empty]

State / Province: [Dropdown]

Country Code: [Empty]

Account Type*: Checking [Dropdown]

Account Holder*: Caroline Long

Routing Number*: 053904483

Account Number*: 123445665

Confirm Account Number*: 123445665

Auto-Draft

Please read the following legal notice. If you agree with the terms and conditions therein, click the box to indicate your authorization for the North Carolina State Health Plan (NCSHP), and/or its vendor, Blue Cross and Blue Shield of North Carolina (BCBSNC), to make monthly withdrawals of funds from your designated bank account.

I am an authorized user of this bank account. As a convenience to me, I hereby request and authorize recurring monthly bank drafts (Auto-draft). The monthly bank drafts will be for the amount invoiced by NCSHP and/or BCBSNC and will be drawn on the first of each month. NCSHP and/or BCBSNC may try up to two times to draw the invoiced amount from this account. I agree that if such charges be dishonored, whether with or without cause and whether intentionally or inadvertently, NCSHP and BCBSNC shall have no liability whatsoever even though dishonor results in forfeiture of insurance. This authorization will remain in effect until I revoke it through this web site.

Auto-Draft Authorization Date: 03/20/2013 10:17:46 AM EST

Account Options

Make this my default payment account

Cancel Save

Notes:

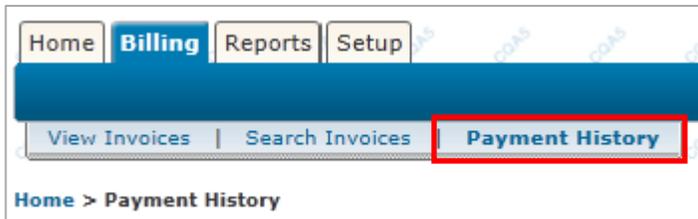
- Auto-draft will be effective the date it is authorized.
- Once auto-draft is enabled, your group’s Total Amount Due will be automatically drafted on the first of each month for the upcoming month. For example, the payment automatically drafted on May 1st covers the billing period May 1-May 31.
- To turn off auto-draft, just repeat the steps to access the auto-draft option, uncheck the box, and click **Save**.
- To view whether an account is set up for auto-draft, refer to Reviewing Payment Accounts Audit Data in this guide.

Viewing Payment History

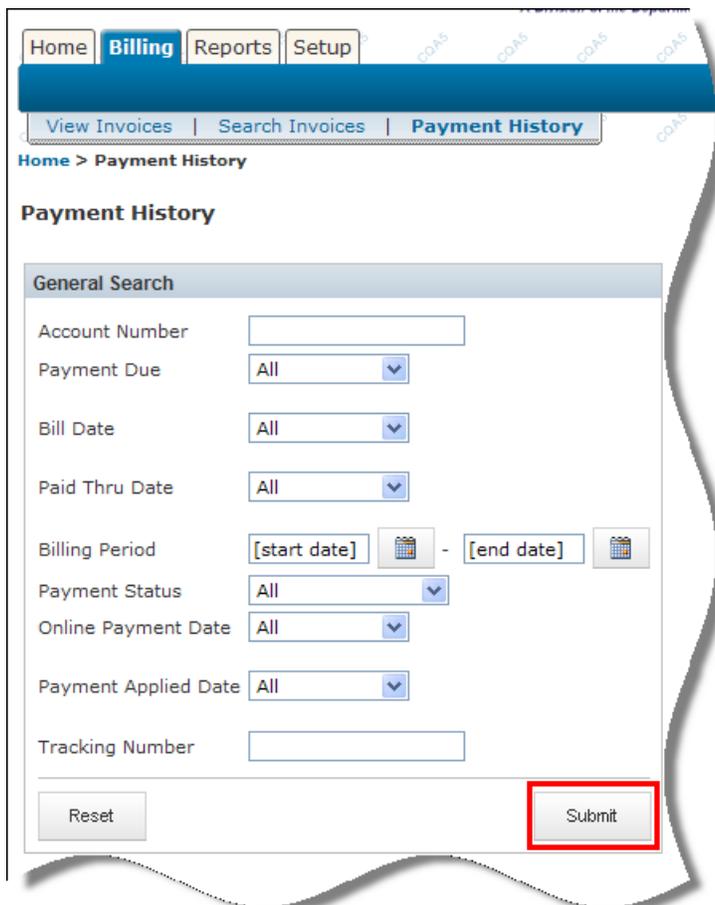
Searching for Payments

Perform the following procedure to search for a payment.

1. Select Payment History from the Billing tab to display the Payments search page.



2. Enter search criteria and select **Submit**.



3. Search Results display as shown below.

Search Results						
2 Items 1 - 2		Advanced Sorting	Search Criteria			
Invoice #	Received Date	Due Date	Description	Activity	Issued Date	Paid Amount
		03/01/2005		Error	02/15/2005	\$2,474.70
		03/01/2005		Payment Pending	02/15/2005	\$855.75

2 Items | 1 - 2

In any table, you can click the  icon to sort the data in descending order by that column. Click the icon again to sort in ascending order. Click the column name to undo sorting.

Creating and Reviewing Reports

You can generate information for specific invoice reports and payment reports. Once generated, reports can be downloaded (saved to your computer) and/or printed.

The Reports tab contains 3 sub-tabs:

- The Create Reports tab displays all available reports. Each report has search criteria and report format (PDF or CSV, for example). You can create a one-time report or schedule reports to run at specific time intervals.
- The Completed Reports tab lists all the reports that have been generated within the last 7 days.
- The Scheduled Reports tab displays any reports that have been set up to run for a specific start and end date. You can edit the reports or delete them from the scheduled run.

Home | Billing | **Reports** | Setup | My Account | Enroll | Help | Logout

Create Reports | Completed Reports | Scheduled Reports

Home > Create Reports

Create Reports

Skip to [Invoice Reports](#) | [Payment Reports](#)

Invoice Reports

Options	Invoice Comparison Report	Report comparing subscriber costs for two invoices
Options	Open Invoices	A report detailing all open invoices.
Options	Retroactivity Report	A report detailing retroactivity information.

[Back to Top](#)

Payment Reports

Options	Payment Report	A report detailing all payments.
Options	Scheduled Payment Report	A report detailing all scheduled payments.

[Back to Top](#)

Creating and Viewing On-Demand Reports

1. Select Create from the drop-down menu for the report you want to generate from the Reports tab. Reports are categorized by Invoice or Payment report type.

Create Reports

Skip to [Invoice Reports](#) | [Payment Reports](#)

Invoice Reports

Options	Open Invoices	A report detailing all open invoices.
---------	---------------	---------------------------------------

Create

Payment Reports

Options	Payment Report	A report detailing all payments.
Options	Scheduled Payment Report	A report detailing all scheduled payments.

[Back to Top](#)

2. Enter the parameters for the report and click **Next** to display the Format tab.

Create a Report

Filter | Format

Open Invoices

Account Number

Payment Due *

Bill Date *

Paid Thru Date *

Billing Period

* = Required Fields

Cancel Reset

- Enter the formatting options, including report output (CSV, HTML, or PDF), and sorting preferences. Do not select the run this report on a regular schedule checkbox since you are submitting this as an on-demand report.

Report Format

Filter
Format

Open Invoices

Report Format: CSV

Sort By: Bill Date Order: Ascending Subtotal by sorted column

Then By: Order: Ascending Subtotal by sorted column

Include grand total.

Include totals at the top of the report

Report Name:

Schedule Report (All scheduled reports will be available to review every morning by 8 am ET)

Run this report on a regular schedule

Maintain report duration until:

Run report every: -- Select --

Cancel
Back
Submit

* **Note about formats:** The following guidelines can assist you in choosing the best output format for your purposes:

- CSV: best for sorting and manipulating data as well as exporting into other applications.
- PDF: best for printing
- HTML: best for viewing information online when printing is not needed

- Click **Submit** to display the report on the Completed Reports tab. While the report is generating, the status displays as “Running” as shown below. Depending on the size and complexity of the report, it may take a few moments to generate the results. Click **Refresh** to determine if the report is ready to be downloaded.

Completed Reports

Refresh

2 Items | 1 - 2

	Status	Date	Report Name	Criteria	Size
Options	COMPLETE	03/19/2013 02:00:41 PM ET	Open Invoices	Format: CSV	1 Kb
	RUNNING	03/19/2013 02:01:23 PM ET	Payment Report	Format: CSV	0 Kb

2 Items | 1 - 2

Please note: Reports older than 7 days will be automatically deleted.

5. Once the report is available, the status changes to Complete. Select **Download** from the drop-down menu to generate the report in the format you selected.

Completed Reports [Refresh](#)

2 Items | 1 - 2

	Status	Date	Report Name	Criteria	Size
Options	COMPLETE	03/19/2013 02:00:41 PM ET	Open Invoices	Format: CSV	1 Kb
Download Delete	COMPLETE	03/19/2013 02:01:41 PM ET	Payment Report	Format: CSV	1 Kb

2 Items | 1 - 2

Please note: Reports older than 7 days will be automatically deleted.

Scheduling Reports

In addition to creating on-demand reports, you can also schedule them. You can set up a report to be run once a week, for example, and the report will run automatically at the designated time. You can define when the report should be run—daily, weekly, and monthly.

If another scheduled report runs during the time period already set for scheduled reports, eBilling creates another instance of the report, rather than replacing the previously-generated report.

To schedule reports:

1. Select **Create** from the drop-down menu for the report you want to generate from the Reports tab. Reports are categorized by Invoice or Payment report type.

The screenshot shows the 'Create Reports' page. At the top, there are links for 'Skip to Invoice Reports | Payment Reports'. Below this is a section for 'Invoice Reports' containing a table with three rows. Each row has a 'Create' button and a description. The first row is 'Invoice Comparison Report' with the description 'Report comparing subscriber costs for two invoices'. The second row is 'Open Invoices' with the description 'A report detailing all open invoices.' The third row is 'Retroactivity Report' with the description 'A report detailing retroactivity information.' There is also a 'Back to Top' link at the bottom left of the table.

Invoice Reports		
▼ Options	Invoice Comparison Report	Report comparing subscriber costs for two invoices
Create	Open Invoices	A report detailing all open invoices.
▼ Options	Retroactivity Report	A report detailing retroactivity information.

The Create a Report window displays with the Filter tab selected.

The screenshot shows the 'Create a Report' window. At the top, there is a navigation bar with 'Home', 'Billing', 'Reports', and 'Setup' tabs. Below this is a sub-navigation bar with 'Create Reports', 'Completed Reports', and 'Scheduled Reports' tabs. The main content area is titled 'Create a Report' and has two tabs: 'Filter' (selected) and 'Format'. Under the 'Filter' tab, there are three input fields: 'Account Number', 'Subscriber ID', and 'Selected Billing Period' (with a dropdown menu showing '05/2013'). At the bottom, there are three buttons: 'Cancel', 'Reset', and 'Next'.

2. Enter the parameters for the report and select **Next** to display the Format tab.

Report Format

Filter **Format**

Open Invoices

Report Format

Sort By Order Subtotal by sorted column

Then By Order Subtotal by sorted column

Include grand total.

Include totals at the top of the report

Report Name

Schedule Report (All scheduled reports will be available to review every morning by 8 am ET)

Run this report on a regular schedule

Maintain report duration until 

Run report every

- Enter the formatting options, including report output (CSV, HTML, or PDF), and sorting preferences. Select the Run this Report on a regular schedule checkbox and enter the scheduling parameters for the time frame you want to run the report.

* **Note about formats:** The following guidelines can assist you in choosing the best output format for your purposes:

- CSV: best for sorting and manipulating data as well as exporting into other applications.
- PDF: best for printing
- HTML: best for viewing information online when printing is not needed

- After filling out scheduled criteria and selecting Submit, you receive a message that states “Your report has been scheduled.”

Notes:

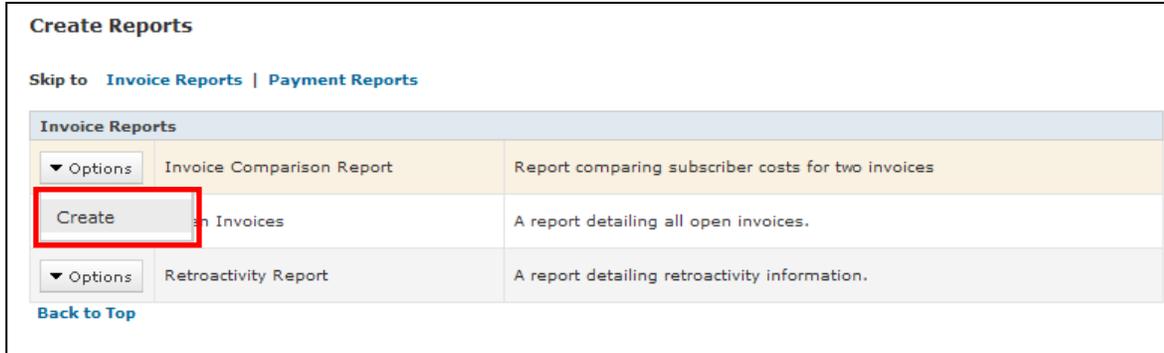
- The report displays under the Scheduled Reports tab with a status of Pending until it runs. It will then have a status of Complete.
- Once you review the report, the status changes to Viewed. Also, the criteria of a scheduled report can be edited.

Invoice Comparison Report

The Invoice Comparison Report will assist with the monthly reconciliation process and understanding what has changed from one month's invoice to the next.

To run the Invoice Comparison Report:

1. Select Create from the Options drop down to the left of the Invoice Comparison Report.



The screenshot shows the 'Create Reports' interface. At the top, there are links for 'Invoice Reports' and 'Payment Reports'. Below this, there is a section titled 'Invoice Reports' containing a table of report options. The 'Invoice Comparison Report' row is highlighted in yellow, and its 'Options' dropdown menu is open, with the 'Create' option selected and highlighted by a red box. Other reports listed include 'Open Invoices' and 'Retroactivity Report'. A 'Back to Top' link is located at the bottom left of the table.

Invoice Reports		
▼ Options	Invoice Comparison Report	Report comparing subscriber costs for two invoices
Create	Open Invoices	A report detailing all open invoices.
▼ Options	Retroactivity Report	A report detailing retroactivity information.

The Create a Report screen displays with the Filter tab selected.

2. Enter the Account Number, Subscriber ID, and Billing Period and click **Next**.



The screenshot shows the 'Create a Report' screen. At the top, there are two tabs: 'Filter' (selected) and 'Format'. Below the tabs, there is a section titled 'Invoice Comparison Report' with three input fields: 'Account Number', 'Subscriber ID', and 'Selected Billing Period' (set to 05/2013). At the bottom, there are three buttons: 'Cancel', 'Reset', and 'Next'. The 'Next' button is highlighted with a red box.

The Format tab displays.

- Select the Formatting options for the report as described in the previous section. Click **Submit**.

The Completed Reports screen displays with the report status “Running.”

- Click Refresh.

Completed Reports

Refresh

2 Items | 1 - 2

	Status	Date	Report Name	Criteria	Size
Options	COMPLETE	04/25/2013 03:18:05 PM ET	ICR	Format: CSV	1 Kb
	RUNNING	04/25/2013 03:31:14 PM ET	ABC	Format: CSV	0 Kb

2 Items | 1 - 2

Please note: Reports older than 7 days will be automatically deleted.

When the report is finished generating, the status changes to Complete.

Completed Reports

Refresh

2 Items | 1 - 2

	Status	Date	Report Name	Criteria	Size
Options	COMPLETE	04/25/2013 03:18:05 PM ET	ICR	Format: CSV	1 Kb
Options	COMPLETE	04/25/2013 03:31:18 PM ET	ABC	Format: CSV	1 Kb

2 Items | 1 - 2

Please note: Reports older than 7 days will be automatically deleted.

- Click the Options dropdown, then click **Download** to download the report.

Completed Reports Refresh

2 Items | 1 - 2

	Status	Date	Report Name	Criteria	Size
Options	COMPLETE	04/25/2013 03:18:05 PM ET	ICR	Format: CSV	1 Kb
Options	COMPLETE	04/25/2013 03:31:18 PM ET	ABC	Format: CSV	1 Kb

Download
Delete

Reports older than 7 days will be automatically deleted.

The report is generated in the format you specified.

	A	B	C	D	E	F	G	H	I	
1	Blue Cross Blue Shield of North Carolina									
2	Invoice Comparison Report									
3	Report Format:	CSV								
4	Generated On:	04/16/2013 05:22:44 PM EDT								
5										
6										
7										
8										
9	Filter:	Selected Billing Period is 05/2013								
10										
11										
12										
13										
14										
15										
16										
17		Item Count	Prior Month Billing Total	Selected Month Billing Total	Difference Amount					
18	Subtotal for Account Num	5	\$2,898.08	\$3,413.44	\$515.36					
19	Total	5	\$2,898.08	\$3,413.44	\$515.36					
20										
21										
22										
23										
24										
25										
26										
27										
28	Group Name	[REDACTED]						Group Number	SEMILY	
29	Address	[REDACTED]						Prior Billing Period	04/01/2013-04/30/2013	
30		[REDACTED]						Selected Billing Period	05/01/2013-05/31/2013	
31										
32										
33										
34										
35										
36										
37	Account Number	Subscriber ID	External ID	Last Name	First Name	Middle Initial	Prior Month Billing Total	Selected Month Billing Total	Difference Amount	
38	SEMILY	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	J	\$927.20	\$599.06	(\$328.14)	
39	SEMILY	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]		\$0.00	\$432.56	\$432.56	
40	SEMILY	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	U	\$0.00	\$1,043.68	\$1,043.68	
41	SEMILY	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	E	\$927.20	\$410.94	(\$516.26)	
42	SEMILY	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	Z	\$1,043.68	\$927.20	(\$116.48)	
43							Subtotal for Account	\$2,898.08	\$3,413.44	\$515.36
44							Grand Total	\$2,898.08	\$3,413.44	\$515.36
45										

Use this report to compare each subscriber's billing totals for the selected month to their totals for the previous month.

Reminder: the Subscriber ID is the member's social security number plus the two-digit BCBSNC suffix.