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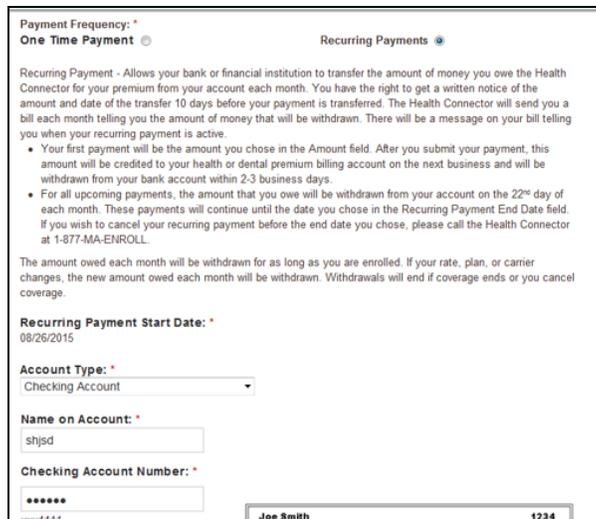
Member Portal Does not refresh when changing from One-time to Recurring Payments

When a member changes their payment frequency on the payment portal from a 'one-time payment' to 'recurring payments' or vice versa (Step 4 of the payment portal set up process), the system normally refreshes the screen removing the banking information. This is currently not happening; the banking information remains on the screen.

Note: This system issue will not stop members from updating their payment information; in fact, the member may not realize that this is not what is meant to happen.

Who is Affected: Members changing payment information on portal.

Example: Member is currently set up to make monthly recurring payments per the screen shot below.

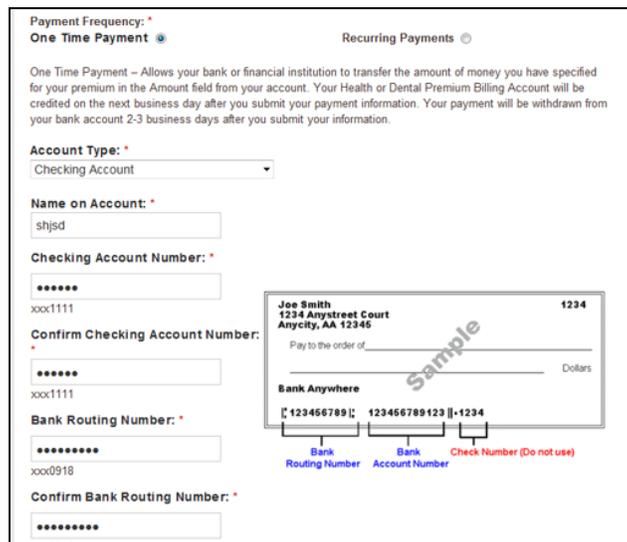


The screenshot shows the 'Recurring Payments' section of the payment portal. At the top, there are two radio buttons: 'One Time Payment' (which is selected) and 'Recurring Payments'. Below this, there is a detailed explanation of recurring payments, including a list of bullet points:

- Your first payment will be the amount you chose in the Amount field. After you submit your payment, this amount will be credited to your health or dental premium billing account on the next business and will be withdrawn from your bank account within 2-3 business days.
- For all upcoming payments, the amount that you owe will be withdrawn from your account on the 22nd day of each month. These payments will continue until the date you chose in the Recurring Payment End Date field. If you wish to cancel your recurring payment before the end date you chose, please call the Health Connector at 1-877-MA-ENROLL.

 Below the explanation, there is a field for 'Recurring Payment Start Date' set to 08/26/2015. Underneath, there is a dropdown menu for 'Account Type' set to 'Checking Account', a text field for 'Name on Account' with 'shjsd', and a masked 'Checking Account Number' field. At the bottom right, there is a small box containing the name 'Joe Smith' and the zip code '1234'.

Member changes information to a one-time payment only per the screen shot below. Note that the banking information is still visible.



The screenshot shows the 'One Time Payment' section of the payment portal. At the top, there are two radio buttons: 'One Time Payment' (which is selected) and 'Recurring Payments'. Below this, there is an explanation of one-time payments. The form fields include:

- 'Account Type' dropdown set to 'Checking Account'.
- 'Name on Account' text field with 'shjsd'.
- 'Checking Account Number' masked field with 'xxxx1111'.
- 'Confirm Checking Account Number' masked field with 'xxxx1111'.
- 'Bank Routing Number' masked field with 'xxxx0918'.
- 'Confirm Bank Routing Number' masked field with 'xxxx0918'.

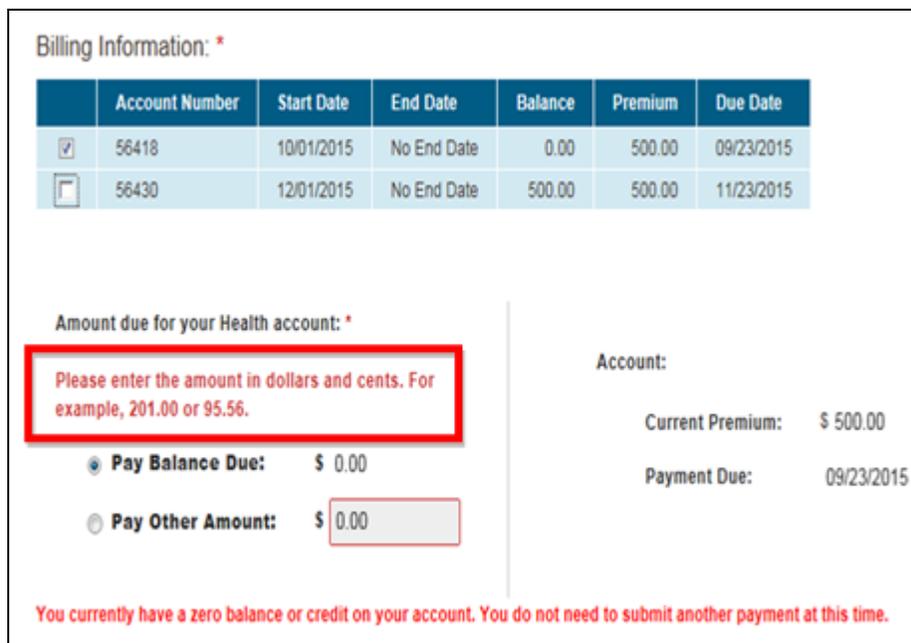
 On the right side of the form, there is a 'Sample' check image. The check is from 'Joe Smith, 1234 Anystreet Court, Anycity, AA 12345'. It includes a MICR line at the bottom: '[123456789] 123456789123 -1234'. Below the MICR line, there are labels: 'Bank Routing Number' under '123456789', 'Bank Account Number' under '123456789123', and 'Check Number (Do not use)' under '-1234'.

Internet Explorer 9 (IE9) Browser Issue in Payment Portal

When a member has two accounts listed in the payment portal and one of them has a zero balance, if checked, the member should only see the statement 'You currently have a zero balance or credit on your account. You do not need to submit another payment at this time.' The member is also seeing an additional statement 'Please enter the amount in dollars and cents. For example, 201.00 or 95.56'.

Who is Affected: Members paying via account portal with zero account balance on one account using **Internet Explorer 9 browser**.

Example: Member has zero balance on account that is selected per the screen shot below. Member should not see the 'Please enter the amount..... notice' as there is no account balance owing.



Billing Information: *

	Account Number	Start Date	End Date	Balance	Premium	Due Date
<input checked="" type="checkbox"/>	56418	10/01/2015	No End Date	0.00	500.00	09/23/2015
<input type="checkbox"/>	56430	12/01/2015	No End Date	500.00	500.00	11/23/2015

Amount due for your Health account: *

Please enter the amount in dollars and cents. For example, 201.00 or 95.56.

Pay Balance Due: \$ 0.00

Pay Other Amount: \$

Account:

Current Premium: \$ 500.00

Payment Due: 09/23/2015

You currently have a zero balance or credit on your account. You do not need to submit another payment at this time.

Member should see the following screen comment only:

Billing Information: *

	Account Number	Start Date	End Date	Balance	Premium	Due Date
<input checked="" type="checkbox"/>	56418	10/01/2015	No End Date	0.00	500.00	09/23/2015
<input type="checkbox"/>	56430	12/01/2015	No End Date	500.00	500.00	11/23/2015

Amount due for your Health account: *

Pay Balance Due: \$ 0.00
 Pay Other Amount: \$ 0.00

Account:

Current Premium: \$ 500.00
 Payment Due: 09/23/2015

You currently have a zero balance or credit on your account. You do not need to submit another payment at this time.

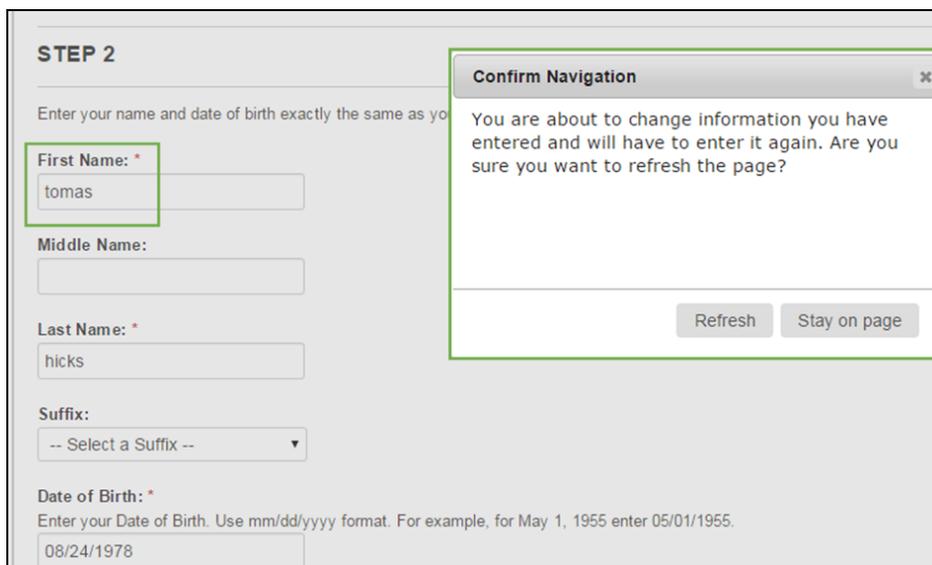
Process: If you encounter this problem when helping a member you can either click on 'pay other amount' to see if you can submit your payment, or switch to another browser such as Google Chrome or Firefox. If you don't have another browser, click off the account that doesn't have a balance and click on your other account. You should be able to pay that one with no issues.

Confirm Navigation Pop-Up Can be Dragged

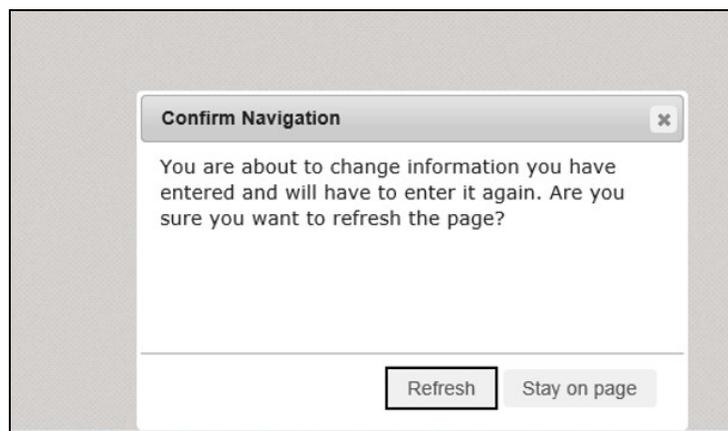
The member will be able to drag the 'confirm navigation' window with their mouse. The popup should remain static, however it can be moved or dragged. If members are using IE9 browser, the window will go only down. This does not affect any information being added to the portal and members may not even know that this should not occur.

Who is Affected: All users who attempt to drag the pop up window.

Example: If at any time a user changes any data that he/she entered in Steps 1 and 2 fields, a warning message will be displayed allowing member to refresh screen and start over (Refresh) or reject the change and continue (Stay on Page).



The popup should remain static, however it can be moved or dragged down the page.



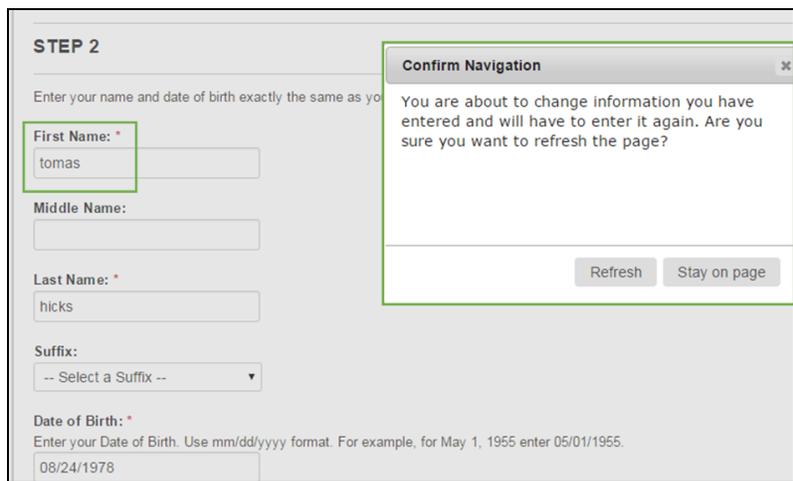
Once again, members may not even know that this should not occur but CSRs need to be aware that this could happen.

Confirm Navigation Pop Up Issue

As a follow on to the 'Confirm Navigation' pop up issue noted above, if a member clicks 'Refresh' on the Confirm Navigation pop up, it should refresh the page. The information is no longer on the screen, but the error message will remain on screen asking them to enter a valid value for the field they changed

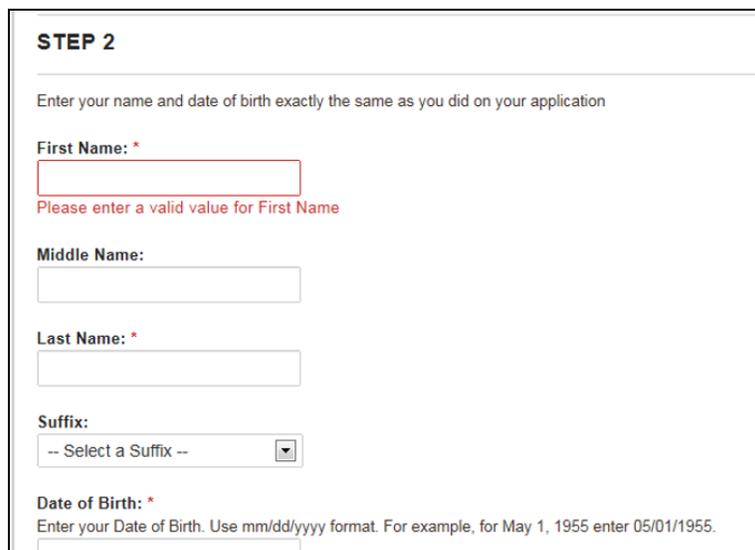
Who is Affected: Members refreshing Confirm Navigation in Steps 1 and 2 of portal application.

Example: Member wants to change information included in Steps 1 and 2 so selects to Refresh information.



The screenshot shows the 'STEP 2' registration form. The form fields are: First Name (with 'tomas' entered), Middle Name, Last Name (with 'hicks' entered), Suffix (dropdown menu), and Date of Birth (with '08/24/1978' entered). A 'Confirm Navigation' pop-up window is overlaid on the right side of the form. The pop-up contains the text: 'You are about to change information you have entered and will have to enter it again. Are you sure you want to refresh the page?'. At the bottom of the pop-up are two buttons: 'Refresh' and 'Stay on page'.

When refresh is clicked, the page will refresh but the error message will remain on page as shown below:



The screenshot shows the 'STEP 2' registration form after a refresh. The form fields are: First Name (empty), Middle Name, Last Name, Suffix (dropdown menu), and Date of Birth. A red error message is displayed below the First Name field: 'Please enter a valid value for First Name'.

Member should enter valid information then click or tab into the next field. The error message will disappear.

Job Aid: Health Connector Payment Portal Tips

Process: If an Assisters is getting an error message to enter a valid value for a first name on the payment portal, please note that this is a known system error that is producing this issue when you click on Refresh. Assisters should enter the correct [field name] into the field then click or tab to the next field. You should see the error disappear.

Recurring Payment Cancellations Not Immediately Viewable After Cancellation

When a member cancels their recurring payment online then returns immediately and views their information again, they should not be able to see it as visible online once cancelled. If the member goes back in to the portal on the same day, it will still be visible. This may result in the member trying to cancel their online payment again and they will not be able to do so.

Notes:

1. Prior to the the 21st of each month, the issue will still be visible the same day that the member cancels the payment; the account will be updated overnight and if the member goes back into the portal the next day, it will no longer be visible.
2. If the member cancels the recurring payment after the 22nd of each month, the account will remain visible until the end of the month.
3. CSRs must be able to educate members as to why they are still seeing their payment.
4. CSRs should always check CSR Lite to make sure the payment has been posted, or the payment is cancelled.

Example:

Member has cancelled the recuring payment, they go back online and it is still visible:

STEP 3

Cancel Recurring Payments: *

	Account Number	Start Date	End Date	Premium	Recurring Start Date	Recurring End Date
<input checked="" type="checkbox"/>	56577	08/01/2015	No End Date	500.00	09/23/2015	10/01/2015
<input checked="" type="checkbox"/>	56577	08/01/2015	No End Date	500.00	10/23/2015	No End Date

Select the recurring payment you would like to cancel.

Monthly premium payment is always due on the 23rd of the month. If you cancel monthly recurring payments, you will need to make a payment using another payment method.

Recurring payments will end as of: 10/03/2015.

Process: If an Assister is helping member to cancel their recurring payment but it is still visible after canceling, they should note the following:

- a. If before the 21st of the month: The sytem will udpate overnight and you should no longer be able to see the recurring payment. You or the member will be able to confirm and see this cancellation if you log back in the next day.”

- b. If after the 21st of the month: The payment will remain visible until the end of the month, when it will then be removed. This is a known system issue that our teams are working to resolve. Please log back in after the first of the month to confirm that the payment has been removed.

Must Use Mouse Not Arrow Keys on Keyboard when Changing 'cents' in 'Other Payment'

When member is updating payment amount and has to change 'cents' when using the arrow keys on the keyboard, it will not allow the member to change; member must use their mouse by clicking on the amount then backspacing to correct or adjust the amount.

Process: If an Assister is helping a a member who is having difficulty changing their payment amount, ask them to please use the mouse to click then backspace, or highlight the entire amount, delete then re-enter.

Account Issues When Account is More Than Three Months Overdue

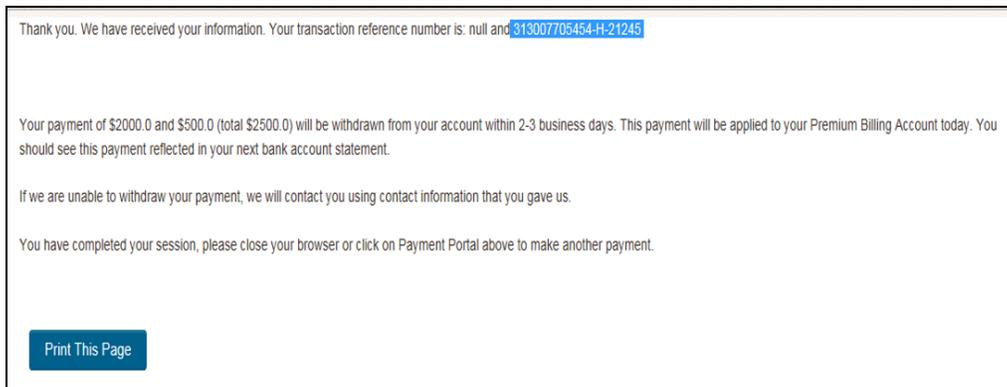
If a member is attempting to submit a payment for multiple accounts online, and one account is at least three months over due, the system will only generate one reference number instead of two; there should be one to confirm the accepted amount (for non-overdue payment), and one null communication for the payment that has been declined for the overdue amount.

Also, if the member is attempting to make a payment that is more than three times the amount owed, it will not be accepted.

Who is Affected: Members attempting to pay an overdue account online after three months.

Example:

1. Member attempts to make an online payment that includes \$2,000 for the overdue account and \$500 for the current account; total payment of \$2,500. Member will see confirmation as follows:



Thank you. We have received your information. Your transaction reference number is: null and [313007705454-H-21245](#)

Your payment of \$2000.0 and \$500.0 (total \$2500.0) will be withdrawn from your account within 2-3 business days. This payment will be applied to your Premium Billing Account today. You should see this payment reflected in your next bank account statement.

If we are unable to withdraw your payment, we will contact you using contact information that you gave us.

You have completed your session, please close your browser or click on Payment Portal above to make another payment.

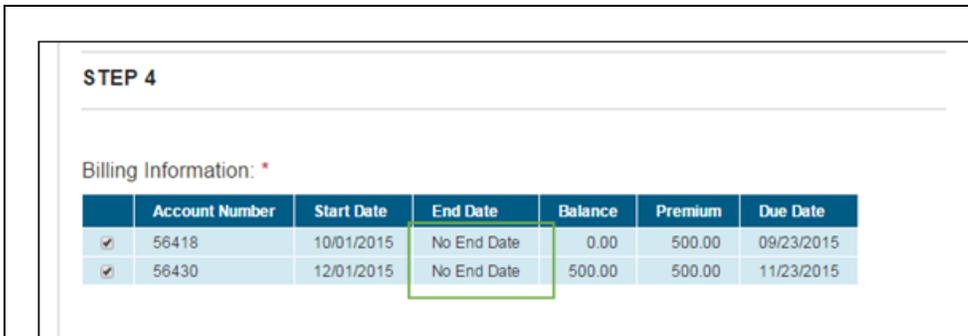
[Print This Page](#)

2. The payment for \$2,000 amount will not be processed. If the member does not keep track of payments processed from their bank account, they will not know – until they receive an additional delinquency or termination notice, or their next invoice - that the payment for \$2,000 was not taken from their bank.
3. If the member wanted to pay the remainder of what is owed, he could go back online the following day, select pay 'other amount', type in amount that is less than 3x the premium amount on that account and submit payment, then the next day return to the portal and follow the same steps to pay the remainder of the balance. OR they could send in a check/money order for the amount due.

No End Date Shown on 2015 Account

Step 4 on the Payment Portal, which displays the billing and account information table, shows two line items: One for a member's 2015 premium, and the second for their 2016 premium. The screen also shows the start and end date for each enrollment.

When a member is enrolled in 2015 and 2016, the end date of the line item for 2015 shows "No End Date" instead of showing 12/31/2015 if the Account does not have an end date.



The screenshot shows a table titled "STEP 4" with the heading "Billing Information: *". The table has seven columns: Account Number, Start Date, End Date, Balance, Premium, and Due Date. There are two rows of data. The first row has a checked checkbox, account number 56418, start date 10/01/2015, end date "No End Date", balance 0.00, premium 500.00, and due date 09/23/2015. The second row has a checked checkbox, account number 56430, start date 12/01/2015, end date "No End Date", balance 500.00, premium 500.00, and due date 11/23/2015. A green box highlights the "No End Date" entries in the End Date column.

	Account Number	Start Date	End Date	Balance	Premium	Due Date
<input checked="" type="checkbox"/>	56418	10/01/2015	No End Date	0.00	500.00	09/23/2015
<input checked="" type="checkbox"/>	56430	12/01/2015	No End Date	500.00	500.00	11/23/2015

Who is Affected: Members who have enrolled for 2016 and do not have an end date for 2015 may call as they may be confused as to why they do not see an end date for their 2015 account.

Showing \$0 balance in Billing Information (Step 4) before quote is issued

For users who have completed Plan shopping and are trying to make a payment the same day, the premium amount will be listed as \$0 until the quote is generated, the next day. However, users can submit a payment and will need to enter the amount they want to pay to replace the \$0 amount.

Note: Users must still wait 4 hours after plan selection before their member information appears in the payment portal

Who is Affected: Members who are newly enrolled, who have not yet had a quote (enrollment bill) issued to them in FMS/CSR Lite will see \$0 as their premium payment if they log into the payment portal on the same day as they completed their shopping. This applies to newly enrolling members (not currently enrolled) and to members changing carriers for 2016.

STEP 4

Billing Information: *

	Account Number	Start Date	End Date	Balance	Premium	Due Date
<input checked="" type="checkbox"/>	56418	10/01/2015	No End Date	0.00	500.00	09/23/2015
<input checked="" type="checkbox"/>	56430	12/01/2015	No End Date	500.00	500.00	11/23/2015

Amount due for your Health account: *

Pay Balance Due: \$ 00.00
 Pay Other Amount: \$

Payment Frequency: *

One Time Payment Recurring Payments

Process: Assister should remind consumers that if they just enrolled today, the Balance Due will show as \$0 today. The system will refresh overnight and you will see the correct amount due the next day. You can however make a payment today even though you see a \$0 balance by entering the amount of your premium into ‘pay other amount’ field. You can find the amount you owe on your ‘my enrollment’ screen if you are logged into your account on the Health Connector website.”