

# InTouch for Employers Tutorial: Administration

## Common terms:

**Census Report:** A list of all those enrolled with your Group.

**Contracts:** A copy of the contract for each of your coverage choices.

**Member Benefit Handbooks:** A copy of the Benefit Handbook for each of your coverage choices.

**Subscriber:** The employee, or the primary person on the record.

**Subscriber ID:** The number assigned to the record at PacificSource for the Subscriber.

**Subgroup or Class:** Group identifiers created to organize your coverage.

**Task function:** You can request any of the following documents relating to your group coverage:

**Census Report:** To get a snapshot of covered enrollees. All transactions through the prior day will be detailed. You will see Subscriber ID number, Employee name, Effective Date, Birth Date, Age, Sex, and indicators showing what kind of coverage they have.

**Contracts:** To get a copy of the contract for each type of medical plans you have selected.






**Member Benefit Handbooks:** To get a copy of the benefit booklets for each type of medical plan you have selected.

1. From your group home page, review the Administration section of the screen to see what documentation you would like to see. Click on the link for the document you wish to see.

The screenshot displays the PacificSource Employer Home page. At the top right, it indicates the user is logged in as 'E' and provides links for 'Help' and 'Log Out'. The main navigation bar includes 'Employer Home: | es' and a 'Print this page' link. The left sidebar contains links for Home, Member Search, Provider Directory, Track Requests, Change Password, and Log Off. The main content area is divided into three sections: 'Employer Group Snapshot' (showing login details for a Group Plan Administrator, address in Albany, OR, and 2 subgroups), 'Contact Us' (providing customer service phone and email), and 'Administration' (highlighted with a red box). The right sidebar contains sections for 'Manage Employees' (with links for Order ID Cards, Add/Update Dependent, Update Address, and Member Search), 'Enrollment' (with links for New Enrollment, Terminate Subscriber, and Reinstate Subscriber), 'Administration' (with links for Census Report, Contracts, and Member Benefit Handbooks), and 'Tasks' (with a link for Work Queue).

2. You will be directed to a screen to add more details of your request. An example of the Census report screen is shown below:

## Census Report

Begin Date*:	<input type="text"/>	
	mm/dd/yyyy	
End Date*:	<input type="text"/>	
	mm/dd/yyyy	
Summary Grouping*:	Group	
Group:	<input type="text"/>	Inc
Display Member List*?	Detail	
Format*:	Excel	
	<input type="button" value="Get Report"/>	<input type="button" value="Close"/>

- You may use the pull-downs next to each field to enter the dates.
- Summary Grouping can be either “Group” or “SubGroup”. This will sort the report for the group as a whole, or detail those enrolled by SubGroup.
- Display Member List can be either “Detail” or “Summary”. This will sort the report for everyone on the group, or simply provide a Summary of enrollments (Family, Employee Only, etc.).
- Format can be either Excel or .pdf format

Once the file is generated you may then print it or download the file.

If you choose either the Contract or Member Benefit Handbook, you will be able to either print or download the file.

PacificSource has a dedicated InTouch for Employers phone line and e-mail address to more efficiently serve your online needs. You may contact us directly by these methods and someone from our InTouch for Employers Team will get back to you as quickly as possible. Note that this is specifically for InTouch for Employers online issues; please continue to contact your Membership Representative for all other questions:

***InTouch for Employers assistance:***

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