

InTouch for Employers Tutorial: Update Address

Common terms:

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

Member: Dependents, or a secondary person on the record.

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

Suffix: The two digit extension after the Subscriber ID number. This is specific to each member entered on the record.

Task function: You can update addresses for your employees through this function.

1. From your group home page, click on the “Update Address” link.

The screenshot shows the PacificSource Employer Home page for a group named 'Inc'. The page is logged in as 'E' and includes a 'Log Out' link. The main content area is titled 'Employer Home: Inc' and features a 'Print this page' button. The page is divided into several sections:

- Employer Group Snapshot:** Displays the user's role as a Group Plan Administrator for 'Inc', the address (Eugene, OR 97402), and phone number ((541) 541-XXXX). It also shows that the group has 6 Subgroups and 6 Active Subgroups.
- Contact Us:** Provides contact information for Membership Services (Phone: (541) 684-5583, Toll free: (866) 999-5583, Fax: (541) 225-3642) and InTouch for Employers (Phone: (541) 225-3742, Email: intouchforemployers@pacificsource.com).
- Manage Employees:** A sidebar menu with options: Order ID Cards, Add/Update Dependent, Update Address (highlighted with a red box), and Member Search.
- Enrollment:** Options for New Enrollment, Terminate Subscriber, and Reinstate Subscriber.
- Administration:** Options for Census Report (reflects transactions through yesterday) and Contracts (with multiple links for Preferred CoDeduct and Preferred Copay).

2. The page titled Member Search will appear. Type in the search criteria and click the Search button. A minimum of one of the following fields is required:
 - Last name (minimum first two letters)
 - Social Security Number (SSN)
 - Subscriber ID

The search results will appear.

| | | | | | | |
|---|--------|-------|---|---|----------|--------|
| 1 | 1 - 00 | James | 1 | 4 | Inactive | |
| 1 | 1 - 02 | C | 1 | 3 | Active | |
| 1 | 1 - 02 | C | | | Active | |
| 1 | 1 - 00 | | 4 | 0 | 2 | Active |

Search Options
A minimum of one of the following fields is required: Last name, Subscriber ID or SSN.

Group ID:

Last Name: Min. first 2 letters

Limit the Search by

First Name:

Subscriber ID:

Birth Date: MM/DD/YYYY

SSN: XXX-XX-XXXX
will only return results if SSN on file

Effective Date: MM/DD/YYYY

City:

State / Zip:

Limit the search to Subscribers only

3. Click on the person for whom you would like information. The following screen will be as shown below:

[Home >](#)

[Change Address](#) [Print this page](#)

Update Information Summary Confirmation

All family members must have a home address. Mailing address is optional.

Click the "Add Address" link to add an address to the list below. Then scroll down and assign an address to each family member.

Address List

[Add Address](#)

| Type | Address | Phone / Email | Edit |
|------|----------------------------|---------------|----------------------|
| Home | 1 Ave Eugene, OR, 97404 | (541) 607- | Edit |

Assigned Addresses
Select an address from the list for each family member. The first address will always be the subscriber's home address.

| | Home Address (Required) | Mailing Address (Optional) |
|--------------|-------------------------|----------------------------|
| Subscriber 1 | 1 Ave, Eugene, OR 97404 | Same as Home Address |
| Subscriber 2 | 1 Ave, Eugene, OR 97404 | Same as Home Address |
| Subscriber 3 | 1 Ave, Eugene, OR 97404 | Same as Home Address |
| Subscriber 4 | 1 Ave, Eugene, OR 97404 | Same as Home Address |

You will see the current address and phone information for the person you selected. From this screen you may do the following:

- If you click on the "Add Address" link, you will be able to add an additional address for any of the family members on this record (in case anyone has a mailing address in addition to their residential address).

- **Only residential mailing addresses can be entered. Commercial addresses are not acceptable since confidential information (ID cards, EOB's, required mailings, etc) will be sent to the mailing address.**
- You could then choose a home address and a mailing address for each family member.
- If you click on the Edit link, you will be directed to the following screen:

Address [H]

* Indicates required information

* Street 1:

Street 2:

Street 3:

Country: ▼

* Zip/Postal Code:
(click the lookup button to auto populate City, State & County)

* City / * State/Province:

County:

Phone: (Area Code & Number) Ext:

Fax: (Area Code & Number)

Email:

4. You may Edit the current home address and phone to reflect changes to your records. This will insure that all documentation for the Subscriber/Member will be delivered to a valid address; or if we need to contact the Subscriber/Member regarding a claim, we will have an updated phone number.

NOTE: You must click on the Look-Up button in order to populate the County field. This is necessary for the transaction to be complete. When you click on this button, please choose the City name that is completely spelled out. Although city abbreviations will load, they are not the preferred choice.

- Click on the Save button to proceed to the next screen. You will then return to the Change Address screen, and the updated information will now show as current.
- Click on the Continue button to complete the transaction.

You will then see the Summary page for Address Changes.

Address Changes

[Edit Address Information](#) [Download as PDF](#)

Home Address

Address: Veneta, OR 97487
County: Lane
Phone: (541)
Fax:
E-mail :

Mailing Address

Address: Veneta, OR 97487
County: Lane
Phone: (541)
Fax:
E-mail :

Home Address

Address: Veneta, OR 97487
County: Lane
Phone: (541)
Fax:
E-mail :

Mailing Address

Address: Veneta, OR 97487
County: Lane
Phone: (541)
Fax:
E-mail :

Home Address

Address: 87583 Halcyon Dr
Veneta, OR 97487
County: Lane
Phone: (541)
Fax:
E-mail :

Mailing Address

Address: Veneta, OR 97487
County: Lane
Phone: (541)
Fax:
E-mail :

5. You then have the option to:

- Re-edit the address/phone information;
- Download this page as a .pdf document; or
- Click Finish to complete the request.

You will then be provided with a Confirmation page. ***Please keep in mind that this simply means that the request has been transmitted to PacificSource. It does not mean that coverage has been approved.*** You may wish to note the Reference Number shown on this page for future reference.

Click on the Home link on the left-hand side of the screen to return to your Group Home Page.

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:

541.225.3742

Fax: 541.225.3642

InTouchforEmployers@pacificsource.com