

# BlueKC Premium Billing Application

## External User Manual

## Table of Contents

---

|                                            |    |
|--------------------------------------------|----|
| Introduction.....                          | 2  |
| Login .....                                | 3  |
| Navigation .....                           | 5  |
| Claims Settlement vs Premium Billing ..... | 5  |
| Group Listing.....                         | 5  |
| Groups and Sub-Groups.....                 | 6  |
| View a Group.....                          | 6  |
| View a Sub-Group.....                      | 7  |
| Invoices .....                             | 9  |
| Invoice List.....                          | 9  |
| Invoice Details.....                       | 10 |
| Payments.....                              | 13 |
| Payments List .....                        | 13 |
| Payment Accounts .....                     | 14 |
| Make A Payment.....                        | 16 |
| Recurring Payments.....                    | 18 |
| Reports.....                               | 21 |
| Account Settings .....                     | 23 |
| <i>Notifications</i> .....                 | 23 |
| <i>Edit User</i> .....                     | 23 |
| Sign Out.....                              | 24 |

# Introduction

The purpose of this document is to outline the functionality of the Premium Billing application, how to access the application, view invoices, make payments, and create reports.

Below is a brief outline of user roles and access to the pages and/or functions within the application. Users may have different access levels, depending on the Group and/or Sub-Group assigned.

| External Roles (users without an @bluekc.com email) |                                     |                                     |                                     |                                     |                                     |
|-----------------------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Function / Page                                     | Broker                              | Broker – View Only                  | Employer Group                      | Employer Group–View Only            | Employer Group Payments-Only        |
| Groups – List View                                  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Sub-Groups – List View                              | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Group Details                                       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Sub-Group Details                                   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Payments – List View / History                      | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Payments – Set Up Account                           | <input checked="" type="checkbox"/> |                                     | <input checked="" type="checkbox"/> |                                     | <input checked="" type="checkbox"/> |
| Payments – Make Payment                             | <input checked="" type="checkbox"/> |                                     | <input checked="" type="checkbox"/> |                                     | <input checked="" type="checkbox"/> |
| Payments – Schedule Recurring Payment               | <input checked="" type="checkbox"/> |                                     | <input checked="" type="checkbox"/> |                                     | <input checked="" type="checkbox"/> |
| Invoices – List View / History                      | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Invoices – View Invoice Details                     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Reports – View / Download                           | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |                                     |
| Account – Invoice Notifications                     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Account – Payment Notifications                     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Resources                                           | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

# Login

To log in to the Premium Billing application, follow the hyperlink below and click **Go to Sign-In Page**: <https://claims.bluekc.com/login>

- Important: Users must begin their login from this URL, rather than directly from the Sign-in page, to avoid potential issues with access.



As a Broker or Employer Group user, enter the corresponding email address and password for an account previously created or create a new account by clicking **Create an Account**. If the user received an onboarding email notification and has not yet created an account, it is important that they use the same email to which the notification was sent. This will ensure appropriate access is assigned within the application.

A screenshot of the Blue KC Employee Login with Active Directory page. The page has a light gray background. On the left, there is a section titled 'Brokers & Employer Groups' with two input fields for 'Email Address' and 'Password', a 'Forgot Password' link, and a blue 'Submit' button. Below the 'Submit' button is a link that says 'Don't have an account? Create an Account'. On the right, there is a circular logo with a calculator and the text 'Blue KC Employee Login with Active Directory' and a blue 'Employee Sign In' button.

After prompted through email account verification, required elements for account creation will be requested (below)

- First Name
- Last Name
- Organization
- Set Password
  - 8 – 64 characters
  - An upper-case letter
  - A lower-case letter
  - A digit

- A symbol
- Confirm Password

Once the account is created, if the user has been assigned access to one or more Groups or Sub-Groups, the user will be able to view them immediately within the application. If no access has been assigned, the user will see an Unassigned User message within the application instructing the user on how to request access to the appropriate Group(s) and/or Sub-Group (s).

 Kansas City

## Unassigned User - concord2023test+employer@gmail.com

You do not have the necessary permissions to access the system. Please contact us to complete your account set up.

### Premium Billing Application

Please contact one of the following:

- Group Representatives, please contact: [Image\\_MS\\_Eligibility@BlueKC.com](mailto:Image_MS_Eligibility@BlueKC.com)
- Brokers, please contact: [pb\\_portal\\_admin@BlueKC.com](mailto:pb_portal_admin@BlueKC.com)

Make sure to provide your full name, group ID, group name, your role, and the subgroups you need access to.

### Claims Settlement Application

Please contact: [claims\\_portal\\_admin@bluekc.com](mailto:claims_portal_admin@bluekc.com)

Make sure to provide your full name, group ID, group name and role.

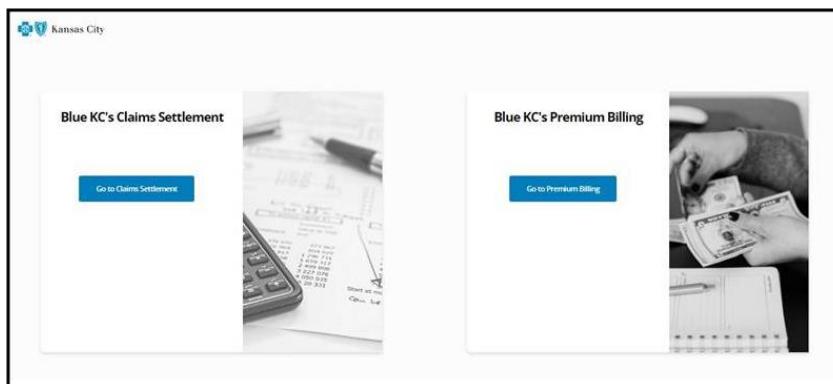
Login

# Navigation

## Claims Settlement vs Premium Billing

Under the circumstance in which the user has access to only one of either **Blue KC's Claims Settlement** or **Blue KC's Premium Billing**, the user will not be prompted with the following screen and will instead land directly on their respective dashboard. When the user has access to both, the following screen will appear, prompting the user to choose.

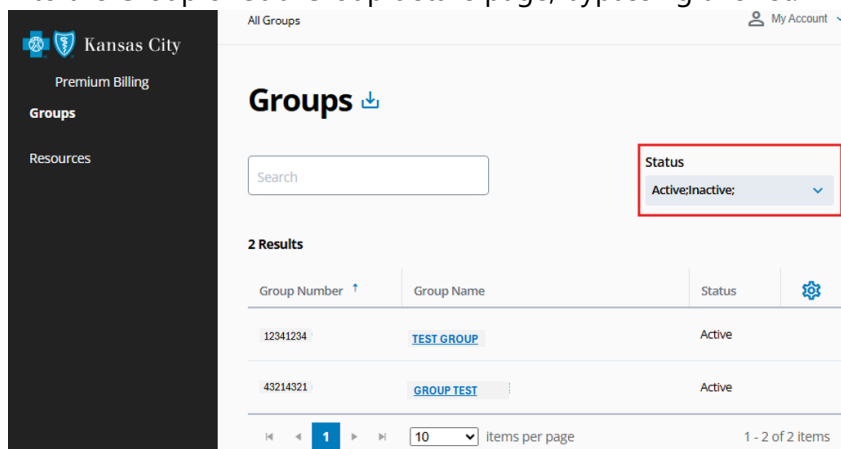
Once inside of the application, users with access to both can navigate between them using the link in the lower left corner to Switch to Claims Settlement or Switch to Premium Billing.



## Group Listing

Initial login to Premium Billing brings the user to the Group listing. Only Groups which the user has access to will appear in this listing.

- To view Inactive Groups or Sub-Groups, modify the Status drop down on the far right to include Inactive.
- If the user has access to only a single Group or Sub-Group, they will be routed directly into the Group or Sub-Group details page, bypassing this list.

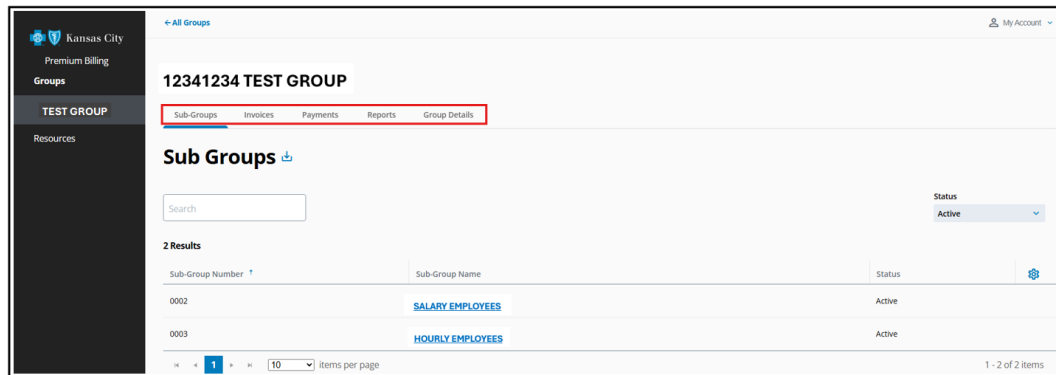


# Groups and Sub-Groups

## View a Group

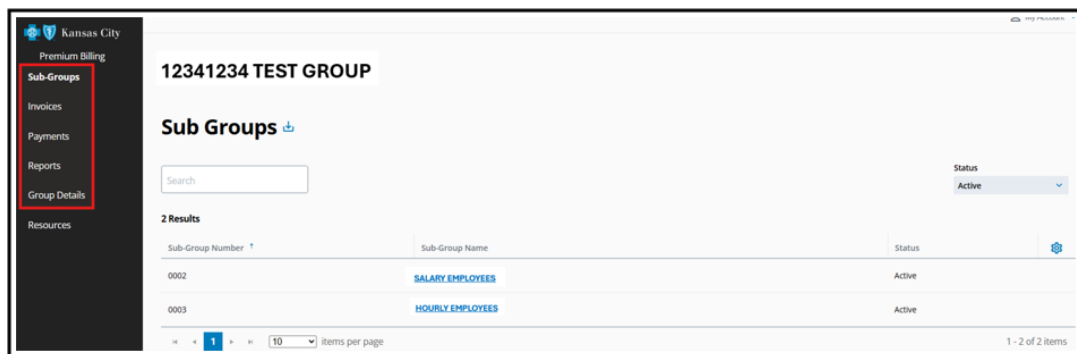
### For users with access to more than one Group:

Once clicking into a specific Group, the user will find a set of tabs with Premium Billing information at the Group level (i.e. all invoices and payments for the Group).



### For users with access to only one Group:

The same information will be found within the left-hand navigation panel.



## Description of each tab

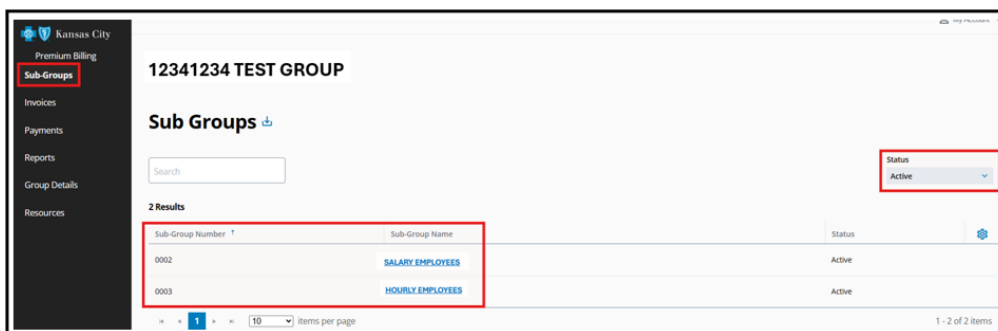
- **Sub-Groups:** A list of Sub-Groups within the group. Each Sub-Group link can be clicked to navigate to the Sub-Group level invoices, payments, reports, and details
- **Invoices:** Invoice history, details, and the open balance amount due across all Sub-Groups within the parent Group
- **Payments:** Payment accounts, payment history, and transaction details across all Sub-Groups within the parent Group
- **Reports:** A list of available reports across all Sub-Groups within the parent Group with field and sort customization
  - This tab will not be accessible to users with Payments-Only access
- **Group Details:** Information about the Group

- Group Information
- Group Assignment
- Agency Assignment
- Group Address
- Sub-Groups
- Classes

## View a Sub-Group

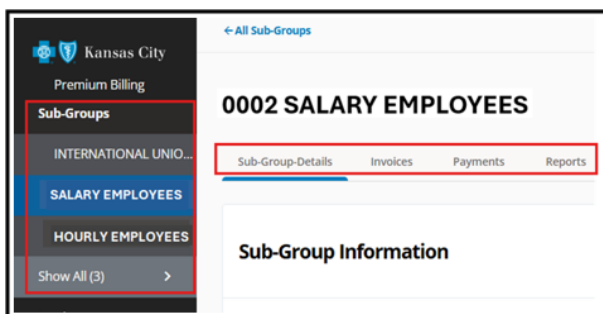
All the Group's Sub-Groups that the user has access to are listed on the Sub-Groups tab.

- To view Inactive Sub-Groups, modify the Status drop down on the far right to include Inactive.



Once clicking a specific Sub-Group link, the user will find a set of tabs with Premium Billing information at the Sub-Group level (i.e. only invoices and payments specific to that Sub-Group).

- Once a Sub-Group has been selected, users may then use the left-hand navigation panel to move between the Sub-Groups that they have access to.



## Description of each tab

- **Sub-Group Details:** information about the Sub-Group
  - Sub-Group Information
  - Sub-Group Assignment
  - Agency Assignments
  - Sub-Group Address

- **Invoices:** Invoice history, details, and the open balance amount due for the specified Sub-Group
- **Payments:** Payment accounts, payment history, and transaction details for the specified Sub-Group
- **Reports:** A list of available reports for the specified Sub-Group with field and sort customization
  - This tab will not be accessible to external users with Payments-Only access

# Invoices

## Invoice List

The invoices and related invoice data that appear on this tab will align to the Group or Sub-Group level the user has navigated from. As in the example seen below, when viewing invoices at the Group level, all invoices for Sub-Groups within the parent Group will be blended in the list (if the user has permission to see those Sub-Groups). At the Sub-Group level only that specific Sub-Group's invoice will be displayed.

### Group Level:

| Sub-Group Number | Invoice Number | Invoice Date | Invoice Due Date | Amount     | Billing Period          | Invoice Activity |
|------------------|----------------|--------------|------------------|------------|-------------------------|------------------|
| 0002             | 250779000896   | 03/18/2025   | 04/01/2025       | \$0.00     | 04/01/2025 - 04/30/2025 | Current          |
| 0003             | 250520000000   | 02/21/2025   | 03/01/2025       | \$8,173.98 | 03/01/2025 - 03/31/2025 | Current          |
| 0002             | 250490000493   | 02/18/2025   | 03/01/2025       | \$0.00     | 03/01/2025 - 03/31/2025 | Prior            |
| 0003             | 250210001879   | 01/21/2025   | 02/01/2025       | \$8,173.98 | 02/01/2025 - 02/28/2025 | Prior            |

### Sub-Group Level:

| Sub-Group Number | Invoice Number | Invoice Date | Invoice Due Date | Amount     | Billing Period          | Invoice Activity |
|------------------|----------------|--------------|------------------|------------|-------------------------|------------------|
| 0003             | 250520000000   | 02/21/2025   | 03/01/2025       | \$8,173.98 | 03/01/2025 - 03/31/2025 | Current          |
| 0003             | 250210001879   | 01/21/2025   | 02/01/2025       | \$8,173.98 | 02/01/2025 - 02/28/2025 | Prior            |
| 0003             | 243610000001   | 12/26/2024   | 01/01/2025       | \$8,173.98 | 01/01/2025 - 01/31/2025 | Prior            |

## Invoice List Features

- **Download** page data via blue download icon next to page title/header
- **Search** list using Group number, Sub-Group number, or invoice number
- **Filters:**
  - Invoice Activity – select from All (default), Current, Prior or Obsolete
  - Selected Due Date Range – leave as the default to show all or select a date range
- **Sort** data on any column by clicking the column header

- **Customize list columns** using the gear icon on the upper right corner of the list
- **View invoice** by clicking on the blue hyperlink invoice number

### Invoice List Reference Data

- **Aging Report - Total Open Balance for Invoice(s) Due:** Amount due for period billed plus any credit or balances from previously unresolved invoice(s). At Group level, this value is cumulated across all Sub-Group invoices within the Group. When at Sub-Group level, this value only cumulates invoices for the specific Sub-Group.
- **Sub-Group Number:** Identifies which Sub-Group the invoice is for
- **Invoice Number:** Unique identification number for each invoice
- **Invoice Date:** Date invoice was posted
- **Invoice Due Date:** Date invoice payment is due
- **Amount:** Amount billed on the invoice for the corresponding billing period
- **Balance Amount:** Amount due for period billed plus any credit or balances from any previously unresolved invoice(s)
- **Billing Period:** The timeframe for which the premiums were calculated
- **Invoice Activity:** Current/prior/obsolete

### Invoice Details

Specific invoices can be viewed individually by selecting the blue hyperlink in the Invoice List. From this specific view, the invoice details display a header with summary information and 4 subtabs with further details. These tabs are **Financial Summary**, **Account Details**, **Current Subscriber Details**, and **Retroactive Adjustments**.

| 0003 HOURLY EMPLOYEES                                                                                                            |              |                         |              |                  |                 |
|----------------------------------------------------------------------------------------------------------------------------------|--------------|-------------------------|--------------|------------------|-----------------|
|                                                                                                                                  |              |                         |              |                  |                 |
| Invoice # 250520000000                                                                                                           |              |                         |              |                  |                 |
| Group ID                                                                                                                         | Sub-Group ID | Billing Period          | Invoice Date | Invoice Due Date | Invoice Balance |
| 12341234                                                                                                                         | 0003         | 03/01/2025 - 03/31/2025 | 02/21/2025   | 03/01/2025       | \$8,173.98      |
|                                                                                                                                  |              |                         |              |                  |                 |
| <div>Financial Summary</div> <div>Account Details</div> <div>Current Subscriber Details</div> <div>Retroactive Adjustments</div> |              |                         |              |                  |                 |
| Original Totals                                                                                                                  |              |                         |              |                  |                 |
| Current Invoice Amount                                                                                                           |              |                         |              |                  | \$8,173.98      |
| Payments                                                                                                                         |              |                         |              |                  | \$8,173.98      |
| Previous Total Due                                                                                                               |              |                         |              |                  | \$8,173.98      |
| Current Invoice Total Due                                                                                                        |              |                         |              |                  | \$8,173.98      |
| Updates to Invoice                                                                                                               |              |                         |              |                  |                 |
| New Payments Received                                                                                                            |              |                         |              |                  | \$8,173.98      |
| New Invoice Balance                                                                                                              |              |                         |              |                  | \$0.00          |

### Invoice Detail Features

- **Export Invoice** button (upper right corner)

- Select File Type of either CSV or PDF
- Select/Deselect the invoice sections to be included
- Optional: Select sorting options for Subscriber Details and Retroactive Adjustments

#### *Invoice Detail Reference Data*

- **Header/Summary**

- **Group ID:** ID distinguishing which Group the invoice belongs to
- **Sub-Group ID:** ID distinguishing which Sub-Group the invoice belongs to
- **Billing Period:** Time frame each invoice is accounting for
- **Invoice Date:** Date the invoice was received
- **Invoice Due Date:** Date that the invoice amount is due
- **Invoice Balance:** Amount due on the invoice

- **Financial Summary:** The financial summary will report the total of the invoice and any updates to it.

#### **Original Totals**

- **Current Invoice Amount:** Subscriber (employee) premium amounts and any retro billing amount billed for the current invoice billing period
- **Payments:** Total amount of payments received for the previous billing period
- **Previous Total Due:** Invoice amount due for the previous billing period
- **Current Invoice Total Due:** Current Invoice Amount + Previous Total Due – Payments

#### **Updates to Invoice**

- **New Payments Received:** Total payment received applied against the specific invoice after it was generated
- **New Invoice Balance:** Current Invoice Total Due after New Payments Received

- **Account Details:** The account details will provide amount summaries for the current billing and the retroactive adjustments.

- **Plan:** The Plan IDs for this account
- **Product Name:** Name of the products offered by this account
- **Coverage Type:** Type of coverage for the product that is offered
- **Subscribers and Dependents:** Number of Subscribers (employees) and dependents enrolled in the plan
- **Amount Due:** Premium billing amount for the specific plan and invoice billing period

- **Current Subscriber Details:** The Current Subscriber (Employee) Details will list the Subscriber details of all Subscribers (for the specific Sub-Group) billed in the current Invoice period.

- **Subscriber ID:** ID of the Subscriber
- **First Name:** First name of the Subscriber
- **M.I.:** Middle initial of the Subscriber

- **Last Name:** Last name of the Subscriber, default sorted in ascending order
- **Plan:** Plan ID the Subscriber is enrolled in
- **Amount Due:** Premium amount of the Subscribers for the current invoice period
- **Class:** Class ID the Subscriber is in
- **Coverage Type:** Coverage type for the plan
- **Retroactive Adjustments:** The retroactive Subscriber (employee) details for the current invoice period.
  - **Subscriber ID:** ID of the retroactive Subscriber
  - **First Name:** First name of the retroactive Subscriber
  - **M.I.:** Middle initial of the retroactive Subscriber
  - **Last Name:** Last name of the retroactive Subscriber
  - **Plan:** Plan ID of the retroactivity
  - **From Date:** The start date of retroactive adjustment period for the specific Subscriber
  - **To Date:** The end date of retroactive adjustment period for the specific Subscriber
  - **Adjusted Amount:** Retroactive Subscriber's premium adjustment amount
  - **Coverage Type:** Type of retroactive Subscriber's coverage

# Payments

## Payments List

The payments and related data that appears on this tab will align to the Group or Sub-Group level the user has navigated from. As seen in the example below, when viewing the payment list at the Group level, all payments for Sub-Groups within the parent Group will be blended in the list.

Of note, the payments list will show successful ACH payments made through the Premium Billing application with two rows -- one row for the transaction initiated through the application with status of "sent" and one row for the processed successful transaction with status of "paid" once the transaction has posted (date and amount will match, as seen below).

Payment History

Recurring Payments

Search

Sub-Groups

Selected Date Range:

Status

294 Results

| Sub-Group Nu... | Group Nu... | Payment Status | Payment Date... | Payment Method     | Payment ID                           | Payment Amount | User Email | Bank Account |  |
|-----------------|-------------|----------------|-----------------|--------------------|--------------------------------------|----------------|------------|--------------|--|
| 0003            | 12341234    | Paid           | 04/24/2025      | Non-System Payment | 1209f131-dd79-4016-a03a-e6f69d992f3  | \$49,073.02    |            |              |  |
| 0003            | 12341234    | Sent           | 04/24/2025      | ACH                | 6cd6b8f2-6cef-4c2b-64ee-0b0d81b982ed | \$49,073.02    |            |              |  |
| 0003            | 12341234    | Sent           | 04/16/2025      | ACH                | 11ae2008-8599-4ebf-e527-0b0d7357c362 | \$159,735.17   |            |              |  |
| 0003            | 12341234    | Paid           | 04/16/2025      | Non-System Payment | 7053d8bf-66f2-4717-8821-bd9779a6a4df | \$159,735.17   |            |              |  |
| 0002            | 12341234    | Sent           | 04/16/2025      | ACH                | f814e13c-e3be-44d7-e529-0b0d7357c362 | \$280,156.88   |            |              |  |
| 0002            | 12341234    | Paid           | 04/16/2025      | Non-System Payment | 9a07c9f9-61ae-4bb6-b91c-048701fb364  | \$280,156.88   |            |              |  |

## Payment List Features

- **Download** page data via blue download icon next to page title/header
- **Search** list using Sub-Group number
- **Filter** list by Sub-Group, payment date, and/or payment status
- **Sort** data on a column by clicking column header
- **Customize list columns** using the gear icon on the upper right corner of the list

## Payment List Reference Data

- **Sub-Group Numbers:** Identifies which Sub-Group the payment is for
- **Payment Status:**
  - **Sent:** An ACH transaction initiated through the Premium Billing application was successfully sent to the payment processing vendor
  - **Paid:**

- Successful transaction of funds applied to the Group or Sub-Group, these records may or may not have been initiated through the Premium Billing application
  - Refunds and Reversals will show a negative amount (with a "Paid" status)
- **Failed:** An ACH transaction initiated through the application failed to successfully process at the payment processing vendor
- **Pending:** An ACH transaction initiated through the application is scheduled to process at a future date and has not yet been sent to the payment processing vendor
- **Cancelled:** An ACH transaction was cancelled and never sent for processing at the payment processing vendor
- **Payment Date:** Date of the payment transaction
- **Payment Method:**
  - **ACH:** Automatic Clearing House (ACH) transaction initiated through the Premium Billing Application for processing at the payment processing vendor
  - **Non-System Payment:** Payment, refund or reversal made via ACH, Wire Transfer, Check or other means
- **Payment ID:** ID distinguishing the unique payment transaction
- **Payment Amount:** Amount paid, refunded or reversed
- **User Email:** User's email that initiated the ACH payment or "Auto Draft" if the ACH payment was initiated due to recurring payment setup
- **Bank Account:** Last 4 digits of the ACH account used for payment
- **Error Message:** Message returned from payment processing vendor regarding failed transactions.

|                                                      |      |          |        |            |     |                                      |          |  |
|------------------------------------------------------|------|----------|--------|------------|-----|--------------------------------------|----------|--|
| !                                                    | 0002 | 12341234 | Failed | 03/10/2025 | ACH | 7e2c0753-346f-41eb-c963-08dd5d6f988e | \$708.61 |  |
| Payment Failed: Fund acct status inactive. Code: 422 |      |          |        |            |     |                                      |          |  |

## Payment Accounts

Users can view abbreviated payment account information for accounts available to an applicable Group or Sub-Group. Users with the ability to manage payments can Add/Edit payment accounts and/or make payments from within this section.

**Group Level** – Users may Add a bank account as well as Make Payment

**12341234 TEST GROUP**

**Payments**

[Make Payment](#)

**Payment Accounts** [Add](#)

| Bank Name                                                                       | Account Number | Name of Registerer | Sub-Group | Created On |
|---------------------------------------------------------------------------------|----------------|--------------------|-----------|------------|
| You do not have any payment accounts. To make a payment, please add an account. |                |                    |           |            |

**Sub-Group Level** – Users may Add or Edit a bank account (including selecting which account is primary), as well as Make Payment

| Bank Name | Account Number | Name of Registerer | Created On |
|-----------|----------------|--------------------|------------|
| ✓ Primary | COMMERCE BANK  | *6241              | 02/20/2024 |

### *Add a Payment Account*

1. Click Add action button at the upper right corner of the Payment Account section
2. A pop-up window displays for account entry, as seen below for the Group and Sub-Group level respectively

3. Account Type: checking / savings
  - a. The Group level pop up defaults to Savings – update to Checking if applicable
4. Routing Number: valid 9-digit routing number required
5. Account Number: max 11 digits
6. Confirm Account Number
7. Name of Account Holder
8. Sub-Group List: select the Sub-Group(s) that the payment account should be applied to (this drop-down will only be present at the Group level)
9. Click Add
10. Account should appear in Payment Account section confirming success

### *Edit a Payment Account*

From the Sub-Group's Payments section, click on the Edit action button in the Payment Accounts section.

- Note: The routing number, account number, and account name are not editable. If corrections are needed, the existing account may be removed and a new account added with the appropriate information.

The screenshot shows the 'Payments' tab with a sub-header 'Payment Accounts'. There are two accounts listed: 'UMB, NA' (Primary) and 'COMMERCE BANK'. The 'Edit' button is highlighted with a red box.

| Bank Name         | Account Number | Name of Registerer | Created On |
|-------------------|----------------|--------------------|------------|
| ✓ Primary UMB, NA | *****1726      |                    | 03/21/2024 |
| COMMERCE BANK     | **3456         |                    | 03/28/2025 |

- **To remove an account**, click on the red X.
  - If the account being deleted is selected as Primary and Recurring Payments are set up, before deleting the account, select a different account to be Primary.

The screenshot shows the 'Payments' tab with a sub-header 'Payment Accounts'. There are two accounts listed: 'UMB, NA' (Primary) and 'COMMERCE BANK'. The 'X' icon next to the 'COMMERCE BANK' account is highlighted with a red box.

| Bank Name                                          | Account Number | Name of Registerer | Created On |
|----------------------------------------------------|----------------|--------------------|------------|
| ✓ Primary <input checked="" type="radio"/> UMB, NA | *****1726      |                    | 03/21/2024 |
| <input type="radio"/> COMMERCE BANK                | **3456         |                    | 03/28/2025 |

- **To change the Primary account**, select the radio button next to the applicable account. The Primary indicator should then be reflected next to the selected account.

The screenshot shows the 'Payments' tab with a sub-header 'Payment Accounts'. There are two accounts listed: 'UMB, NA' (Primary) and 'COMMERCE BANK'. The 'Primary' indicator and radio button for 'UMB, NA' are highlighted with a red box.

| Bank Name                                          | Account Number | Name of Registerer | Created On |
|----------------------------------------------------|----------------|--------------------|------------|
| ✓ Primary <input checked="" type="radio"/> UMB, NA | *****1726      |                    | 03/21/2024 |
| <input type="radio"/> COMMERCE BANK                | **3456         |                    | 03/28/2025 |

- Once changes are complete, click the Save button.

## Make A Payment

For users with access to make payments, the Make Payment button appears on the Group and Sub-Group payment tab in the upper right corner.

**Payments** [↓](#)

**Make Payment**

**Payment Accounts** [Add](#)

| Bank Name | Account Number | Name of Registerer | Sub-Group | Created On |
|-----------|----------------|--------------------|-----------|------------|
|-----------|----------------|--------------------|-----------|------------|

### *Make a Payment by ACH*

1. Click Make Payment button at the upper right corner of the Payment tab
2. A pop-up window displays

**Make Payment** ×

Payment Date \*  [📅](#)

Payment Method \*

Sub-Group \*  [...](#)

Payment Account \*

Payment Amount \*  [Current Amount](#)

**Open Invoices**

| Group Number | Sub-Group Number | Invoice Number | Invoice Date | Invoice Due Date | Invoice Ac... | Amount      | Balance Amount |
|--------------|------------------|----------------|--------------|------------------|---------------|-------------|----------------|
| 12341234     | 0003             | 250630000217   | 03/04/2025   | 03/01/2025       | Current       | \$44,075.28 | \$44,075.28    |

1 - 1 of 1 items

Invoice(s) Total: \$44,075.28

3. Input fields for payment
  - a. Payment date: Date must be the day you are making the payment or a date in the future
    - i. Note: If the payment date is for the same day that payment is being made, the payment cannot be cancelled once scheduled.
  - b. Payment method: ACH (check method detailed below)
  - c. Sub-Group: Select the Sub-Group to apply the payment to (this drop-down will only be present at the Group level)
  - d. Payment Account: Select from the drop down of available accounts
  - e. Payment Amount:
    - i. Current Amount: Total open balance
    - ii. Prior Amount: Open balance minus current invoice
    - iii. Other: Any amount, less than or equal to the Balance Amount due (exceptions may apply)
4. Once required fields are completed, click Make Payment
5. Transaction will appear in Payment List with status
  - f. Sent: Payment was successfully transmitted for processing
  - g. Failed: Payment was not successful, error message will appear in the payment transaction row of the Payment List
  - h. Pending: Payment has not yet occurred (scheduled for future date)

## Make a Payment by Check

1. To print an invoice remittance stub for check payment by mail, click the Make Payment button in the upper right corner of the Payments tab
2. A pop-up window displays

**Make Payment**

Payment Date \* 5/8/2025 Payment Method \* Check Payment (print stub) Sub-Group \* 0003

**Open Invoices**

| Group Number | Sub-Group Number | Invoice Number | Invoice Date | Invoice Due Date | Invoice Ac... | Amount      | Balance Amount |
|--------------|------------------|----------------|--------------|------------------|---------------|-------------|----------------|
| 12341234     | 0003             | 250630000845   | 03/04/2025   | 03/01/2025       | Current       | \$28,390.07 | \$28,390.07    |

1 - 1 of 1 items  
Invoice(s) Total: \$28,390.07

**Print Check Stub**

3. Input fields for Check Payment print stub
  - a. Payment Date: Defaults to today's date
  - b. Payment Method: Select Check Payment (print stub)
  - i. Sub-Group: Select the Sub-Group you want to print the stub for (this drop-down will only be present at the Group level)
4. Click Print Check Stub to generate a PDF check stub instructing user to print, complete, and send via mail with check for processing.

**Due Date:** 03/01/2025

**Total Amount Due:** \$28,390.07

**Enter the Total Amount of Your Enclosed Payment:** \$ \_\_\_\_\_

**The following invoices are included in the total amount due:**

| Group / Sub-group: | Invoice Number: | Amount Due Per Invoice: | Apply the Following Amounts per Invoice: |
|--------------------|-----------------|-------------------------|------------------------------------------|
| 0003               | 250630000845    | \$28,390.07             | \$ _____                                 |

**PLEASE SUBMIT MANUAL PAYMENTS TO THE FOLLOWING ADDRESS**

BLUE CROSS AND BLUE SHIELD OF KANSAS CITY  
PO Box 801714  
Kansas City, MO 64180-1714

5. Check transactions do not appear in the Payment List unless and until the payment has been received and processed (payment method of Non-System Payment).

## Recurring Payments

For users with access to create a recurring payment, the Create Recurring Payment button appears on the Sub-Group payment tab in the upper right corner when the user has the Recurring Payment subtab selected. Recurring Payments will be drafted from the Payment Account selected as Primary. To change the Primary Payment Account, reference the [Edit a Payment Account](#) section of this document.

The screenshot shows the 'Payments' interface. At the top right, there is a blue button labeled 'Create Recurring Payment'. Below this, the 'Payment Accounts' section is visible, featuring a table with columns: Bank Name, Account Number, Name of Registerer, and Created On. The table lists two accounts: UMB, NA (marked as Primary) and COMMERCE BANK. At the bottom left, there are tabs for 'Payment History' and 'Recurring Payments', with the latter being selected and highlighted by a red box.

| Bank Name         | Account Number | Name of Registerer | Created On |
|-------------------|----------------|--------------------|------------|
| ✓ Primary UMB, NA | *****1726      |                    | 03/21/2024 |
| COMMERCE BANK     | **3456         |                    | 03/28/2025 |

### Create Recurring Payment

1. Confirm that the appropriate Payment Account is selected as Primary as this will be the account used for Recurring Payments. To change the Primary account, refer to the Edit a Payment Account section. To add a new account, refer to the Add a Payment Account section.
2. Click Create Recurring Payment button at the upper right corner of the Payment tab (Recurring Payment subtab must be selected)
3. A pop-up window displays

The screenshot shows the 'New Recurring Payment' pop-up window. It contains the following fields and options:

- Group Name**, **Group ID**, **Sub-Group Name**, and **Sub-Group \*** (a drop-down menu).
- Payment Account** section with a note: '\*Recurring payment will process against the payment account listed as primary at time of transaction each month.'
- Start Date \*** (5/9/2025), **End Date \*** (12/31/9999), and **Initiate Payment Date \*** (a drop-down menu).
- A checkbox for **Terms of agreement**.

4. Input fields required for creating the recurring schedule
  - a. Sub-Group: Select the Sub-Group you want the recurring payments applied to (this drop-down will only be present at the Group level)
  - b. Start date: Must be a future date and cannot overlap with existing recurring payment schedules
  - c. End date: Must be after start date. Drafts will cease after the End date even if the status is active.
  - d. Initiate payment date: 1<sup>st</sup> – 9<sup>th</sup> of month; this is the day the funds will be drafted each month
  - e. User must check the Terms of Agreement box.
5. Once required fields are completed, click Save Recurring Payment
6. Recurring schedule will appear in Recurring Payment List and transactions occurring as part of the recurring schedule will appear in the Payment List

### *Edit a Recurring Payment Schedule*

1. On the Recurring Payments subtab, the recurring payment schedules are listed.
2. If the recurring payment row is in an Active status, it cannot be modified.
  - a. If needed, Cancel the recurring payment and then Create Recurring Payment with the appropriate information.
3. If the recurring payment row is in a Ready status (prior to the initial draft date), click on the three-dot icon at the far right of the row and select Edit.
  - a. Update as needed, check the Terms of Agreement box and select the button to Save Recurring Payment.

### *Cancel a Recurring Payment Schedule*

1. On the Recurring Payments subtab, the recurring payment schedules are listed.
2. If the recurring payment row is in a Ready status (prior to the initial draft date), click on the three-dot icon at the far right of the row and select Delete.
3. If the recurring payment row is in an Active status, click the three-dot icon at the far right of the row and select Deactivate.
  - a. The status will be updated to Inactive, and the End Date will be updated with the date it was deactivated

# Reports

---

Through the **Reports** tab, users are able to generate reports for immediate download in PDF and Excel format by selecting the blue down arrow to the far right. Report types are **Payment**, **Scheduled Payment**, **Open Invoices**, **Invoices Report**, **Retroactivity**, and **Subscriber Details**. The user can choose their desired report, date range, and Sub-Group (when producing reports at Group level).



| Report Type              |                          |
|--------------------------|--------------------------|
| Open Invoices            | <a href="#">Download</a> |
| Invoices Report          | <a href="#">Download</a> |
| Retroactivity            | <a href="#">Download</a> |
| Subscriber Detail Report | <a href="#">Download</a> |
| Payment Report           | <a href="#">Download</a> |
| Scheduled Payment Report | <a href="#">Download</a> |

**Open Invoices Report** – Contains invoice(s) with an outstanding balance

**Invoices Report** – Contains invoice history

**Retroactivity Report** – Contains details of retroactive Subscriber activity for the given Group, Sub-Group and period

- **Label System:** Identifier for which system the user is in
- **Group ID:** ID distinguishing which Group the Subscriber belongs to
- **Sub-Group:** ID distinguishing which Sub-Group the Subscriber belongs to
- **Billing Period:** Time frame each Invoice is accounting for
- **Subscriber ID:** Identifying number for the Subscriber
- **First Name:** First name of the Subscriber
- **M.I.:** Middle Initial of the Subscriber
- **Last Name:** Last Name of the Subscriber
- **Plan:** Plan ID the Subscriber is enrolled in
- **To Date:** Date the Subscriber was first included in the plan
- **From Date:** Date the Subscriber was no longer in the plan or end of report date range (whichever comes first)

**Subscriber Detail Report** – Contains details of Subscribers for the given Group, Sub-Group and period.

- **Label System:** Identifier for which system the user is in

- **Billing Period:** Time frame each Invoice is accounting for
- **Group Name:** Name of the Group
- **Group ID:** ID distinguishing which Group the Subscriber belongs to
- **Sub-Group:** ID distinguishing which Sub-Group the Subscriber belongs to
- **Subscriber:** Identifying number for Subscriber
- **SSN:** Social Security number (only showing last 4 digits) of the Subscriber
- **First Name:** First name of the Subscriber
- **M.I.:** Middle Initial of the Subscriber
- **Last Name:** Last Name of the Subscriber
- **Class:** Class ID the Subscriber is in
- **Plan:** Plan ID the Subscriber is enrolled in

**Payment Report** – Contains details of all payments made for the given Group, Sub-Group and period

**Scheduled Payment Report** – Contains details of all scheduled payments made for the given Group, Sub-Group and period

**Other Reports** (downloads throughout the application)

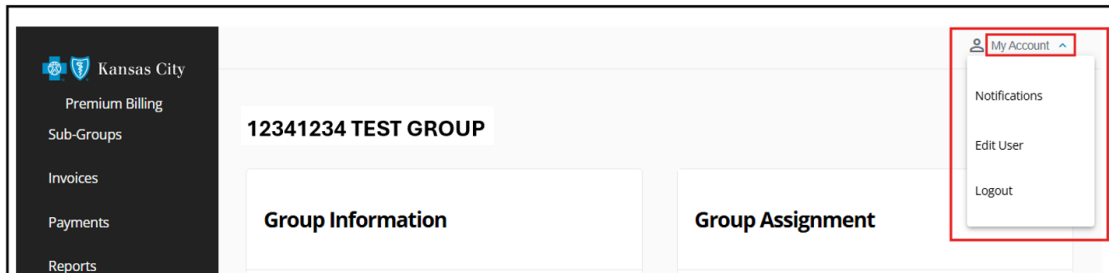
The Sub-Group Listing, Invoices, and Payments page data can be downloaded from the applicable page. Go to the desired page, select the desired parameters from the drop-down options, and utilize the gear icon to the far right of the header row to add/remove columns and click on the column headers to sort the values as needed. Once the data parameters have been set, click the download button.

| Invoices  |                |                                                                                                  |                          |             | Aging Report                             |                                                                                                        |
|----------------------------------------------------------------------------------------------|----------------|--------------------------------------------------------------------------------------------------|--------------------------|-------------|------------------------------------------|--------------------------------------------------------------------------------------------------------|
| Search <input type="text"/>                                                                  |                | Invoice Activity<br>All                                                                          | Selected Due Date Range: |             | Total Open Balance<br>for Invoice(s) Due | \$1,689,339.41                                                                                         |
| Sub-Group Number                                                                             | Invoice Number | Invoice Date  | Invoice Due Date         | Amount      | Billing Period                           | Invoice Activity  |
| 0063                                                                                         | 250630000011   | 03/04/2025                                                                                       | 03/01/2025               | \$896.45    | 03/01/2025 - 03/31/2025                  | Current                                                                                                |
| 0112                                                                                         | 250630000149   | 03/04/2025                                                                                       | 03/01/2025               | \$14,808.03 | 03/01/2025 - 03/31/2025                  | Current                                                                                                |

# Account Settings

---

Static in the upper right corner of the application, account settings are available through **My Account**. From here, the user can manage notifications, edit their first/last name or log out.



## Notifications

Users may view or edit their notification preferences by selecting the Notifications option and using the sliders to turn them on (blue) or off (white). Preferences can be applied globally to all Groups or at the Group or Sub-Group level.

- **Payment Notifications:** If a user elects to receive payment notifications, the user will receive an email notification any time a payment is successfully posted to the application, was attempted and failed, or is refunded or reversed.
- **Invoice Notifications:** If a user elects to receive invoice notifications, the user will receive a notification any time an invoice is posted, regardless of the amount due (positive, negative or no amount due).

## Edit User

Users may edit their First/Last name only by selecting the Edit User option.

- The email address cannot be modified for the existing account. If a different email address is desired, the user should contact Blue KC to add a new user account with the applicable email address and assigned to the Group/Sub-Group(s). The user would then need to go through the Create an Account process again for the new login ID/email.

# Sign Out

---

Once the user would like to sign out of the premium billing application, they can access **My Account** on the upper right-hand side. The user will simply click **Log Out** in the list of options and the application will sign the user out and navigate back to the login page.