

View Member Information

To view a member's information, click on the arrow at the far right of the row under **Actions** and select **Member Details**.

Members			Add Subscriber
<input type="text" value="test"/>			
MEMBER NAME	DOB	STATUS	ACTIONS
Dina Test	04/26/1998	Active	▼
Dina Test	05/01/1994	Active	▼
Ten Test	04/26/1998	Active	▼
Test Blue Test Last Name	01/05/1975	Active	▼
Test Red T	01/18/1990	Active	▼
Test1 TestLast2	08/12/1981	Active	▼
Test1 TestLast2	10/28/1981	Active	▼

Member Details
Edit Member Details
Edit Group/Subgroup

On the **Member Details** page, you can view:

1. any pending changes the member has made
2. pending plans
3. their current plans/enrollment information
4. demographic information
5. information about dependents

You can also update member details from this page by clicking **Update Member**.

Bob Robin
[View Changes](#)
1

Pending Plans
[Update Plans](#)
2

PLAN NAME	PLAN TYPE	COVERAGE	START DATE	END DATE	YOUR COST	EMPLOYER COST	WHO IS COVERED?	ACTIONS
Optima Plus 1000/20%	Medical	Employee - Child	08/02/2022	08/01/2023	\$0.00			▼

10 ▼
1

Current Plans
3

PLAN NAME	PLAN TYPE	COVERAGE	START DATE	END DATE	YOUR COST	EMPLOYER COST	WHO IS COVERED?
Optima Plus 1000/20%	Medical	Employee - Children	08/09/2021	08/01/2022	\$280.00	\$0.00	Pinto Robln, Anne Jones, Ralph I

10 ▼
1

Demographics
Update Member
4

Member Details

Name	DOB	Gender
Bob Robln	08/06/1991	Male

Mailing address

Street Name	City	State	Zip Code	Phone Number	Email Address
1234	east main street	Chlcago	23456	(258) 741-3717	bobrob@test.com

Dependents
5

DEPENDENT NAME	DOB	ADDRESS	RELATIONSHIP	GENDER	ACTIONS
Pinto Robln	08/25/1998	1234, Chlcago, east main street, 23456	Other Dependent	Female	▼
Anne Jones	08/10/2010	1234, Chlcago, east main street, 23456	Child	Female	▼
Ralph Robln	08/11/2021	1234, Chlcago, east main street, 23456	Child	Male	▼
Anne Jones	08/12/2010	1234, Chlcago, east main street, 23456	Child	Female	▼
Kelly Robln	08/07/1996	1234, Chlcago, east main street, 23456	Disabled Child	Female	▼

10 ▼
1

Modify Member Information

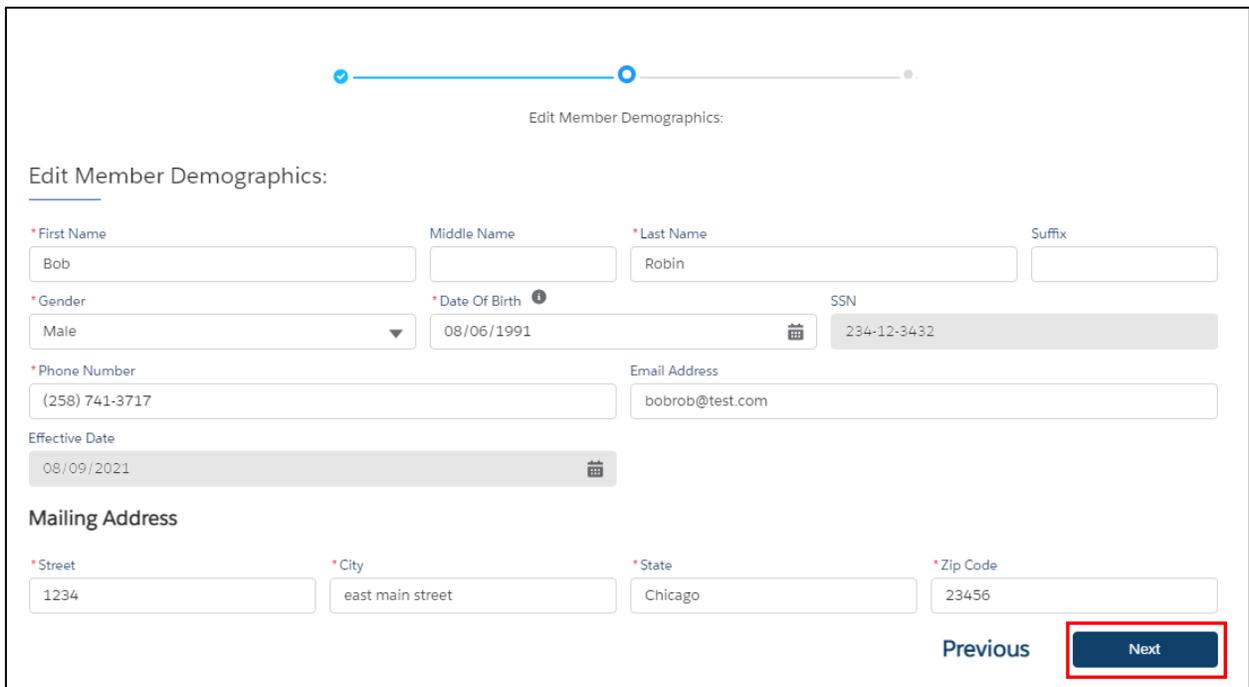
After clicking **Update Member**, a pop-up window will appear. Select **Update Member** to make edits and then click **Next**.



A progress bar at the top shows the first step is active. Below the question "What would you like to do?", there are three radio button options: "Update Member" (selected), "Life Event", and "Other Correction". A blue "Next" button is located in the bottom right corner, highlighted with a red box.

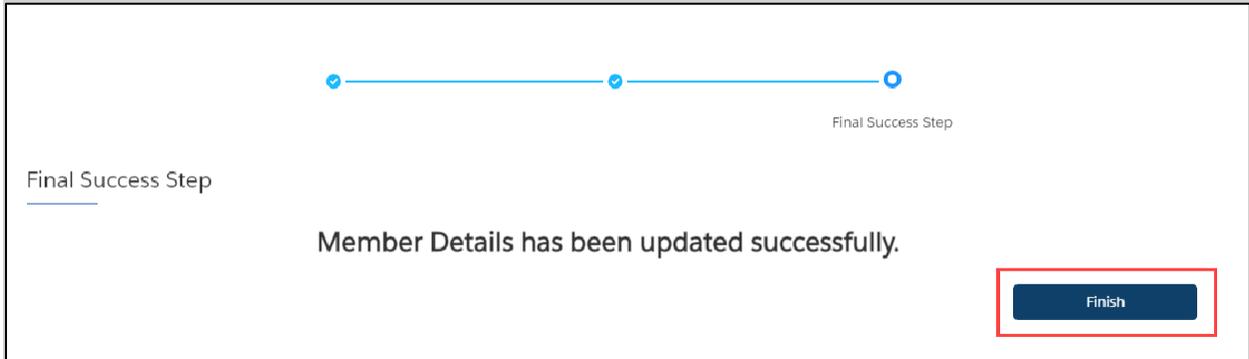
Editable member information is featured in white blocks on the screen. Grayed out blocks of information are not editable.

Once you have completed your edits, click **Next**.



A progress bar at the top shows the second step is active. The form is titled "Edit Member Demographics:". Fields for "First Name" (Bob), "Middle Name", "Last Name" (Robin), and "Suffix" are visible. "Gender" is set to "Male". "Date Of Birth" is 08/06/1991. "SSN" is 234-12-3432 and is grayed out. "Phone Number" is (258) 741-3717. "Email Address" is bobrob@test.com. "Effective Date" is 08/09/2021 and is grayed out. The "Mailing Address" section includes "Street" (1234), "City" (east main street), "State" (Chicago), and "Zip Code" (23456). A "Previous" button and a blue "Next" button (highlighted with a red box) are at the bottom right.

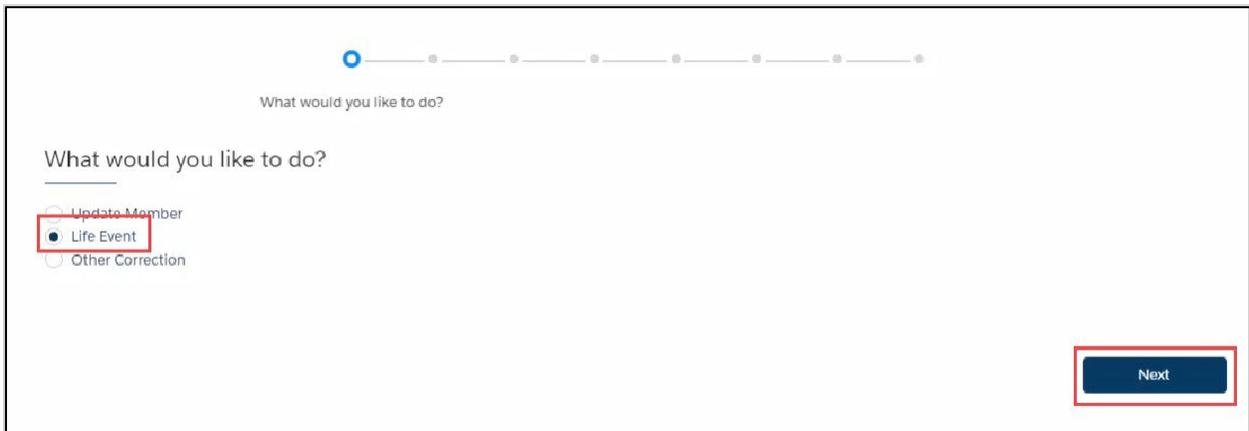
Congratulations! You have successfully updated the member's details. Click **Finish** to complete the process.



A progress bar at the top shows three steps. The first two are completed with checkmarks, and the third is the current step, indicated by a blue circle. Below the progress bar, the text "Final Success Step" is underlined. The main message reads "Member Details has been updated successfully." A dark blue button labeled "Finish" is located in the bottom right corner, highlighted with a red border.

Update Life Event

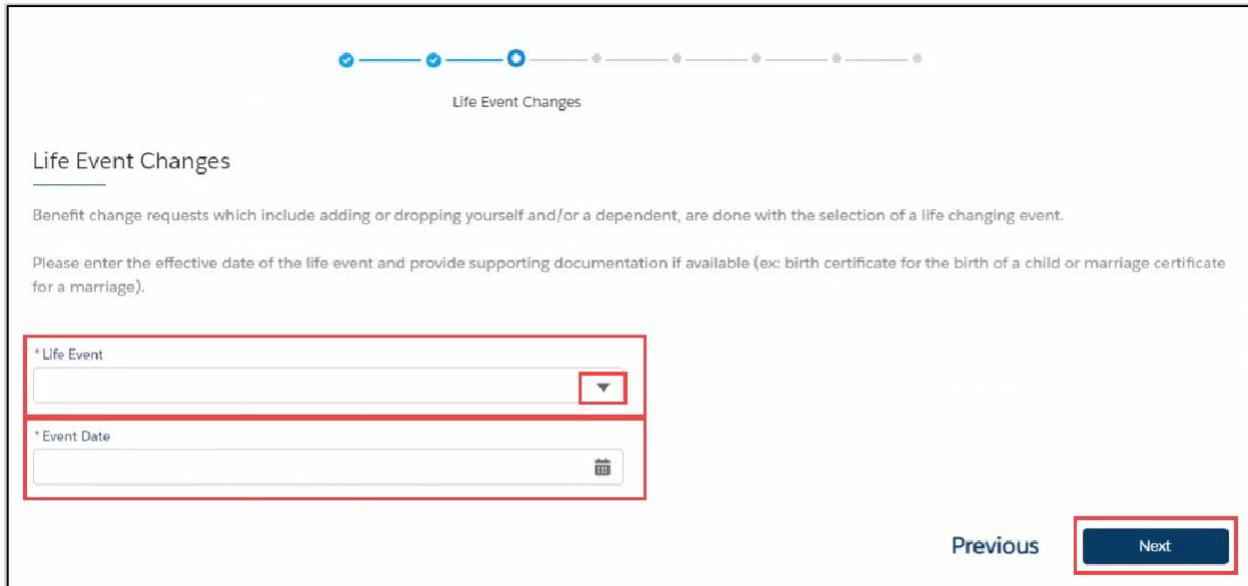
After clicking **Update Member**, a pop-up window will appear. Select **Life Event** to make edits and then click **Next**.



A progress bar at the top shows seven steps. The first step is the current step, indicated by a blue circle. Below the progress bar, the text "What would you like to do?" is underlined. The main message reads "What would you like to do?". There are three radio button options: "Update Member", "Life Event", and "Other Correction". The "Life Event" option is selected and highlighted with a red border. A dark blue button labeled "Next" is located in the bottom right corner, also highlighted with a red border.

Select the applicable **Life Event** from the dropdown menu, provide the date of the event, and click **Next**.

Note: **Life Events** can add and remove coverage for the member or their dependents, depending on the event selected.



The screenshot shows a multi-step process for "Life Event Changes". At the top, a progress bar indicates the current step. Below the title "Life Event Changes", there is explanatory text: "Benefit change requests which include adding or dropping yourself and/or a dependent, are done with the selection of a life changing event." and "Please enter the effective date of the life event and provide supporting documentation if available (ex: birth certificate for the birth of a child or marriage certificate for a marriage).". The form contains two input fields: a dropdown menu for "Life Event" and a date picker for "Event Date". At the bottom right, there are "Previous" and "Next" navigation buttons.

Life Event Changes

Benefit change requests which include adding or dropping yourself and/or a dependent, are done with the selection of a life changing event.

Please enter the effective date of the life event and provide supporting documentation if available (ex: birth certificate for the birth of a child or marriage certificate for a marriage).

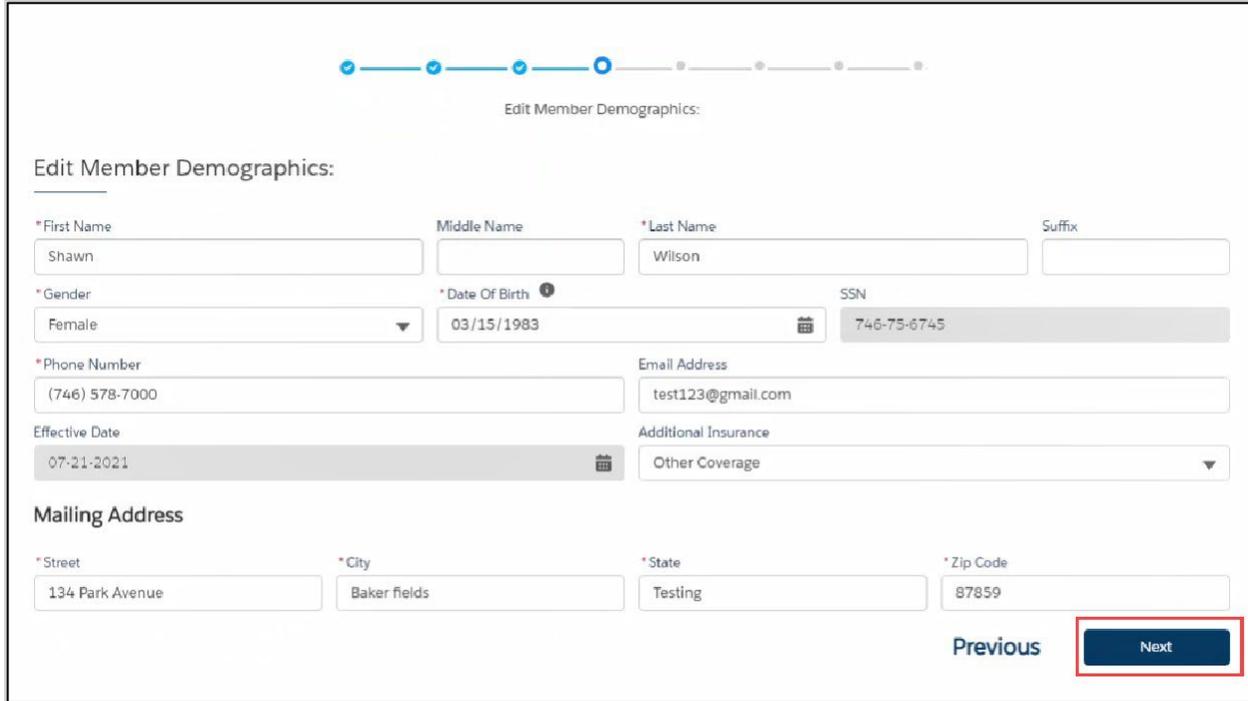
* Life Event

* Event Date

Previous Next

Review member information and make edits as needed. Editable member information is featured in white blocks on the screen. Grayed out blocks of information are not editable.

Once you have completed your edits, click **Next**.



Progress indicator: 4 steps, step 4 is active.

Section: Edit Member Demographics:

Fields and values:

- *First Name: Shawn
- Middle Name: [Empty]
- *Last Name: Wilson
- Suffix: [Empty]
- *Gender: Female
- *Date Of Birth: 03/15/1983
- SSN: 746-75-6745 (Grayed out)
- *Phone Number: (746) 578-7000
- Email Address: test123@gmail.com
- Effective Date: 07-21-2021 (Grayed out)
- Additional Insurance: Other Coverage
- Mailing Address:
 - *Street: 134 Park Avenue
 - *City: Baker fields
 - *State: Testing
 - *Zip Code: 87859

Buttons: Previous, Next (highlighted with a red box)

Review and update any relevant dependent information and click **Next**.

For guidance on adding and editing information about dependents, refer to the previously mentioned steps [here](#).

Then, select plans. Refer to the process flow [here](#) for more details.

The only difference with this experience is that you will see the member's current plan above the other available plans.

Results 2 Available Plans

Current Plan: Optima Plus Platinum 15/30 Direct Compare

Plan Details

✓ Standout Features

ANNUAL DEDUCTIBLE None	OUT-OF-POCKET LIMIT \$4000/\$8000	PRIMARY DOCTOR COVERAGE None
SPECIALIST COVERAGE None	PRESCRIPTION DRUG COVER...	EMERGENCY ROOM COVERA...
HOSPITAL STAY COVERAGE None		

✓ Added to Cart

Optima POS Platinum 15/30 Direct (OOA) Compare

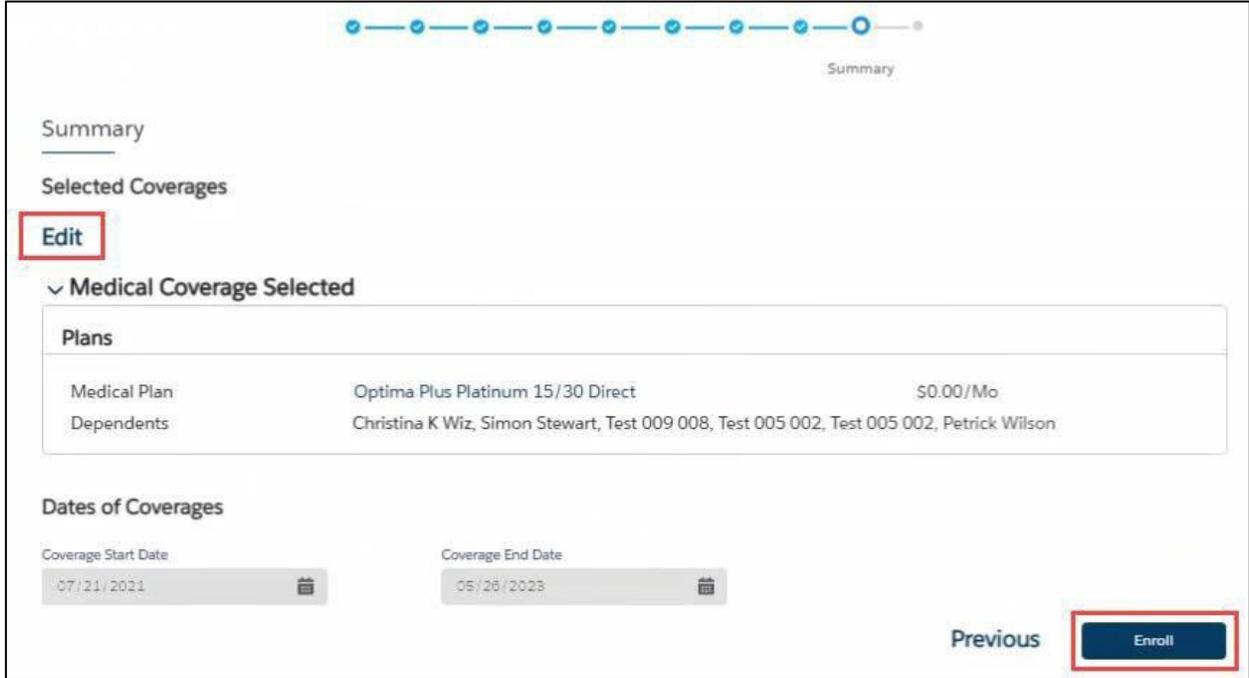
Plan Details

✓ Standout Features

ANNUAL DEDUCTIBLE None	OUT-OF-POCKET LIMIT \$4000/\$8000	PRIMARY DOCTOR COVERAGE None
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After completing the process of plan selection, review the plans selected. If changes are needed, click **Edit**.

If the information and selections are correct, click **Enroll**.



Summary

Selected Coverages

Edit

Medical Coverage Selected

Plans		
Medical Plan	Optima Plus Platinum 15/30 Direct	\$0.00/Mo
Dependents	Christina K Wiz, Simon Stewart, Test 009 008, Test 005 002, Test 005 002, Petrick Wilson	

Dates of Coverages

Coverage Start Date: 07/21/2021

Coverage End Date: 05/26/2023

Previous **Enroll**

Other Correction

After clicking **Update Member**, a pop-up window will appear. Select **Other Correction**, enter the date of the correction, and then click **Next**.



What would you like to do?

What would you like to do?

Update Member

Life Event

Other Correction

*Event Date

Required

Next

From here, the process mirrors that of a life event update. Please refer to that process [here](#) if you have questions.