

Thorough

Flexible

Efficient

Prompt

Accurate

Professional

HR Administrator Web Access Tools

*Sample Reports &
Screen Shots*



Heritage Consultants Inc.
P.O. Box 1730
Auburndale, FL 33823



Heritage Consultants-Professional Administrators

Internet Services

- **Web Access for Administrators** – Through our online Web Access, the client’s Privacy Officer and approved staff can access eligibility, claims status, history information and run several reports.
- **Eligibility Change Data Capabilities** – The Web Access allows administrators to change eligibility data for covered employees and their dependents. The employee’s SS# is entered to pull up that insured’s information currently on file. Then, the administrator can enter the data to be changed. This function generates an email to our eligibility department and the changes are then entered into our claim system.
- **Other Eligibility Capabilities** – Web Access allows administrators to terminate dependent and/or employee coverage. ID cards can also be requested.



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- **Reporting Capabilities** – All reports listed can be customized by inserting the Incurred and Paid date ranges of your choosing. Reports can also be customized by choosing All, Network or Non-Network claims. The reports include the following:
 - Employee Claim List (total claim payments by member)
 - Account Summary (summary claim total by division)
 - Benefit Code Summary (summary claim totals by claim type)
 - Top Provider Report (summary listing of providers with largest claim payments)
 - Void Checks (listing of voided claim payments)
 - Refunds (listing of refund claim payments)
 - Unpaid Claims (listing of claims in authorized status)
 - Pended Claims (listing of claims in pended status)
 - Large Claimant reports (this can be used to review claimants with a specific dollar amount)





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Logon Instructions

1. The website address for the Web Access is listed below. Please note the "s" after "http" which signifies that you are accessing a "secure" website. Also, make sure to remove the "www." that is usually at the beginning of a web address.
<https://web.floridatpa.com>
2. When you enter the web address and press "Go" you should get a "Security Alert" message asking if you want to proceed. This is the correct procedure since you are accessing a Secure website. Choose the "Yes" button when you get this message.
3. Next, you should see the "Welcome to Heritage Internet Services" screen - Choose the "Employer" box. This will allow you to login as the *administrator* and have access to information for *all members* in your group.
4. Next, you should see the "Welcome to Heritage Consultants, Inc. Internet Services" screen.



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Internet Services

Logon Instructions

5. To Log In, enter your information: (Use the TAB key to move between the fields) *****Your confidential logon information will be sent under separate cover.*****

Group ID: _____
Division: _____
Password: _____

6. After entering the logon data, use the mouse to "CLICK" on the "GO" button.
7. Next you should see the "Main Entrance" screen. If so, you have successfully entered the web access program. If you have difficulty, please notify us for assistance.
8. To close the connection, ALWAYS click on "Sign Out" on the left side of the screen.



Welcome to Heritage Consultants, Inc. Internet Services

[Main Entrance](#)

◆ [Employers](#)

◆ [Employees](#)

◆ [Enrollment](#)

◆ [Providers](#)

Employer Sign In

If you are a member use sign in below to gain entrance.

Group ID : Division: Password:
Use " **MASTER** " for Master Groups. [forgot password?](#)

If you are not a member and would like to signup call your customer service representative at Heritage Consultants, Inc. or email us.

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Welcome to Heritage Consultants, Inc. Internet Services

Main Entrance

[ABC Company](#)
Group ID: 1111
Signed in as: MASTER

◆ Sign Out

View Info

- ◆ [Employee Information](#)
- ◆ [Pending Transactions](#)
- ◆ [Outbound Transactions](#)
- ◆ [All Transactions](#)
- ◆ [Realtime Reports](#)
- ◆ [Monthly Reports](#)

Employee Add/Change

- ◆ [Address](#)
- ◆ [Beneficiary](#)
- ◆ [SSN](#)
- ◆ [Add/Change Dependents](#)
- ◆ [Terminate Coverage](#)
- ◆ [Enroll New Employee](#)
- ◆ [ReEnroll an Employee](#)

Requests

- ◆ [ID Card](#)
- ◆ [Certificate of Coverage](#)
- ◆ [Cobra Event](#)
- ◆ [Forms](#)

List

- ◆ [Divisions](#)
- ◆ [Employees by SSN](#)
- ◆ [Employees by Name](#)

Division Changes

- ◆ [Details](#)
- ◆ [Password](#)

Recent Activity

Pending Transactions

Trans ID	Date	Time	Request Type	Description	Division	View Details
----------	------	------	--------------	-------------	----------	--------------

There are currently no transactions waiting to be processed.

End of Transactions

Transactions Waiting to be Processed

Trans ID	Date	Time	Request Type	Description	Division	View Details
----------	------	------	--------------	-------------	----------	--------------

There are currently no transactions waiting to be processed.

End of Transactions

Employee List By Name

ABC COMPANY Group 1111						
Name	SSN	Password	Effective	Terminated	Division	Details
JOHN SMITH	111111111	6B5A121	12/8/2003		23	View
GREG SMITH	222222222	6B5A121	12/8/2003		18	View
JAMES SMITH	333333333	63A265B	1/1/2003		19	View
MAURICE SMITH	444444444	7D4A670	1/1/2003		17	View

View Employee Information

Employee Details

Group Information

Group ID 1111
Division 17

Personal Information

First Name ROBERT
Last Name SMITH
Social Security # 111111111
Birth Date 11/1/1960
Address 1 123 COOPER STREET
Address 2
City HOUSTON
State TX
Zip 12345

Coverage Dates

Coverage Date 5/11/2003
Term Date

Contact Information

Email 1 No primary email address on file
Email 2 No secondary email address on file

Dependents

ID	SSN	First Name	Last Name	Birth Date	Relation	Effective	Terminated	Claims
EMP	111111111	ROBERT	SMITH	11/1/1960	Employee	5/11/2003		_____
1	000000000	TONJA	SMITH	11/2/1959	Spouse Female	5/11/2003		_____
2	000000000	DILLON	SMITH	8/1/1988	Son	5/11/2003		_____



Corporate **Benefit** Solutions LLC
Helping you put the pieces together.

Current Coverage

ID	Description	Effective	Termed	Class
0	Medical	5/11/2003		
0	Dental	5/11/2003		
0	Vision	5/11/2003		
1	Vision	5/11/2003		
1	Medical	5/11/2003		
1	Dental	5/11/2003		
2	Medical	5/11/2003		
2	Vision	5/11/2003		
2	Dental	5/11/2003		

Claims View

Open Claims				
Claim No.	Provider Name	Incurred Date	Incurred Amount	View
There are currently no open claims for this employee.				
End of List				

Closed Claims							
Claim No.	Provider Name	Incurred Date	Incurred Ammount	Check Ammount	Check Number	Close Date	View
050280010	PHYSICIAN NETWORK	1/18/2005	\$86.00	\$44.50	227205	2/2/2005	
041530553	SHELBY GREEN, DDS	5/27/2004	\$662.00	\$331.00	200539	6/9/2004	
041240796	SHELBY GREEN, DDS	4/29/2004	\$280.00	\$210.00	199164	5/26/2004	
041180203	SHELBY GREEN, DDS	4/21/2004	\$162.00	\$162.00	199164	5/26/2004	
041180201	SHELBY GREEN, DDS	4/23/2004	\$353.00	\$227.25	199164	5/26/2004	
End of List							

Claim Details

Details for Claim Number 050280010

Claim Information

Group: 1111
Division: 17
Insured: 111111111
Patient: 0
Patient Responsibility: \$25.00

Provider Information

Name: PHYSICIAN NETWORK
Check Date: 2/2/2005
Check Amount: \$44.50
Check Number: 227205
Check Address:

Claim Details

Benefit	Dates of Service	Total Charges	Provider Discount	Ineligible Amount	Ineligible Code	Deductible Amount	Copay Amount	Coins Amount	Benefits Paid
	1/18/2005	\$86.00	\$16.50	\$0.00		\$0.00	\$25.00	\$0.00	\$44.50

Welcome to Heritage Consultants, Inc. Internet Services

REPORT MENU

Please Enter Report Parameters. 1111

Report Type:

Benefit Level:

Beginning Paid Date:

Ending Paid Date:

Beginning Incurred Date:

Ending Incurred Date:

Employee ID:

Large Dollar Amount:

Unpaid/Pended reports do not require date ranges.

In and Out of Network does not apply to all reports.

Void/Refund reports do not utilize Employee ID.

Only the Large Claim report utilizes this field.

Report List

Employee Claim List
Account Summary
Benefit Code Summary
Top Provider Report
Void Check Report
Refund Report
Unpaid Report
Pended Report
Large Claim Report

Claim Types

All Claims
Network Claims
Non-Network Claims



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Helping you put the pieces together.