

Welcome to the Client Portal User Guide

This User Guide was created to help with the Client Portal. Throughout the guide, please be aware of these references:

Here is a list of symbols that you will see throughout the Guide:



Phone Number



Email Address



Drop Down
Menu



Date

Birthdate

Please Note: When in the portal, you may come across boxes that are greyed-out. This indicates information that cannot be edited.

Secure Site

Please Note: There are 4 ways to let you know that our site is secure. The “s” in the URL HTTPS denotes a secure site and a padlock in the URL is another secure icon when a site is verified as secure. Our privacy policy notates our secure site credentials and our logo of security on the payment pages. Everything must be updated and put in place in order for us to be allowed to post these logos.

Reminder- You can access the Client Portal User Guide or FAQ at the bottom of the website at any time.

The Client Portal URL: my.mwadmin.com

Upon logging into the Client Portal, the first thing you will see is the Home page:

The screenshot shows the 'Manage Your Insurance' dashboard. Callout 1 points to the 'Change Address' button. Callout 2 points to the 'Add Dependent' button. Callout 3 points to the 'Alerts / Notices' button. Callout 4 points to the 'GOLD PLAN' section. Callout 5 points to the 'Participant' section. Callout 6 points to the 'Dependents' section. Callout 7 points to the 'System Docs' section.

1. Change Address

2. Add a Dependent

3. Alerts/Notices-Click to see any alerts/notices from the portal that need your attention.

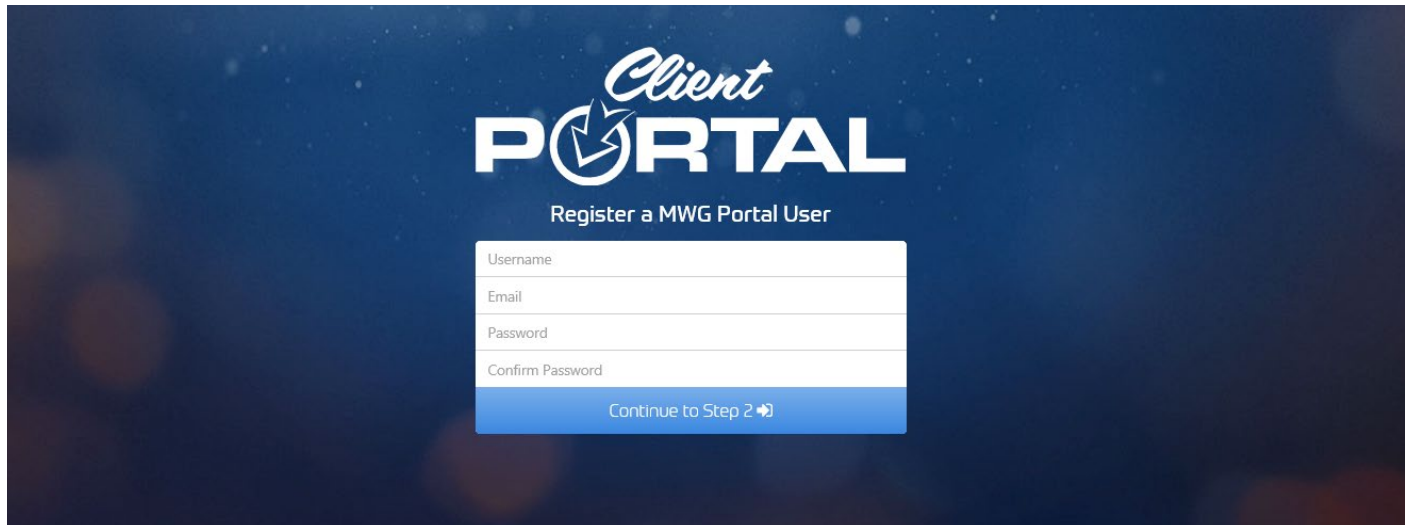
4. Plans (Active+Termed)

5. Participants Area

6. Dependents Area

7. System Documents

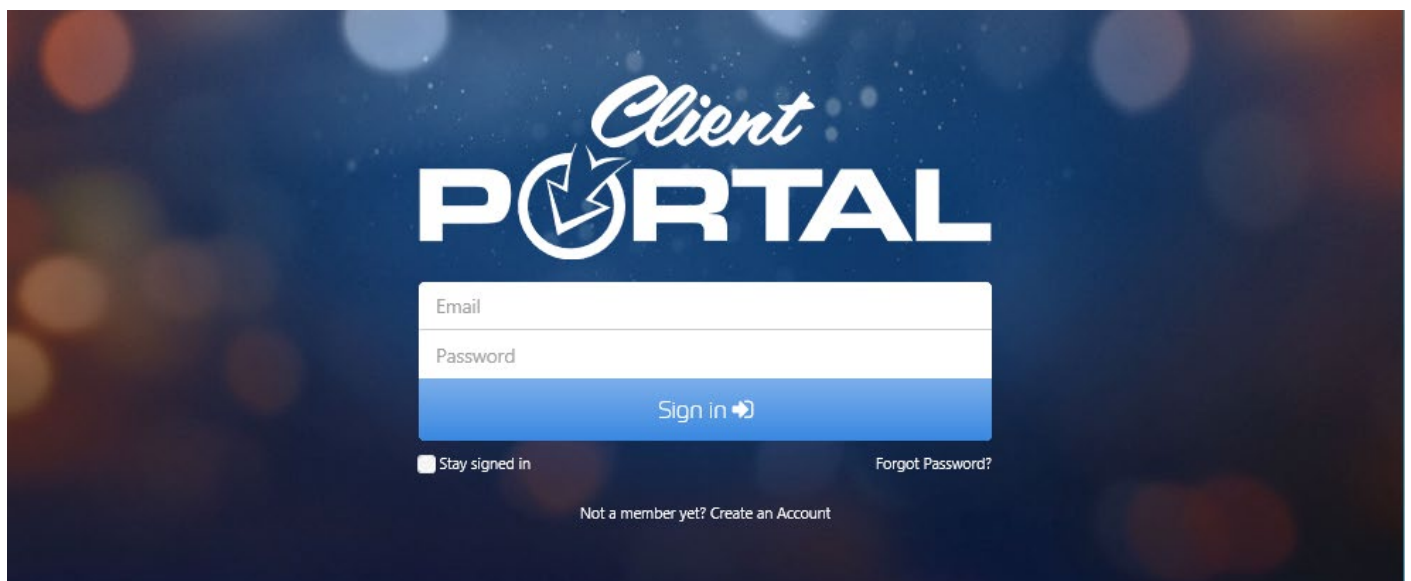
You will either register as a new user or log in as an existing user.

The image shows a registration form for the Client Portal. At the top, the logo "Client PORTAL" is displayed, with "Client" in a script font and "PORTAL" in a bold, sans-serif font. Below the logo, the text "Register a MWG Portal User" is centered. The form itself is a white box with four input fields: "Username", "Email", "Password", and "Confirm Password". Below these fields is a blue button with the text "Continue to Step 2" and a right-pointing arrow.

To Register as a New User

Click "Create an Account" and enter the correct information.

The data registered (Date of Birth, Last four digits of Policy Holder's Social) must match what we have in our system or you will get an error. Our Customer Service line (1-(888)-859-3795) can verify the data is correct for the policy holder in our system. The system will then allow for a successful registration.

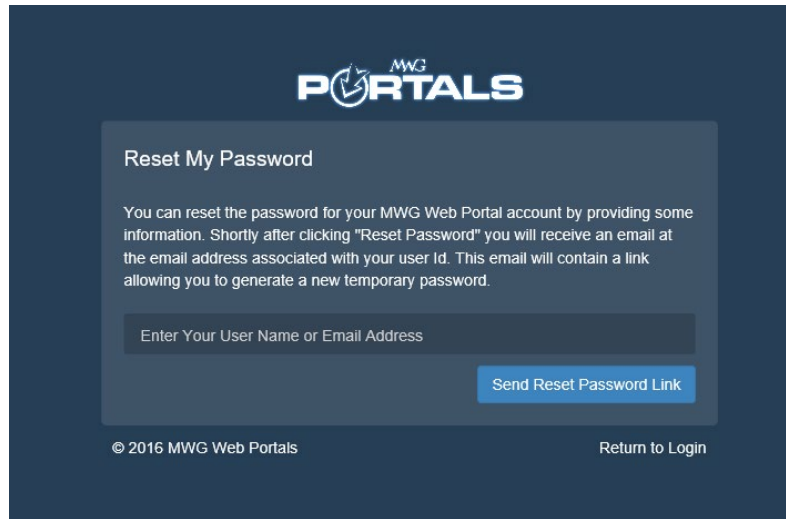
The image shows a login form for the Client Portal. At the top, the logo "Client PORTAL" is displayed, with "Client" in a script font and "PORTAL" in a bold, sans-serif font. Below the logo, the text "Sign in" is centered. The form itself is a white box with two input fields: "Email" and "Password". Below these fields is a blue button with the text "Sign in" and a right-pointing arrow. Below the button, there are three links: "Stay signed in" (with a checkbox), "Forgot Password?", and "Not a member yet? Create an Account".

Log In as an Existing User

If you are already registered, you will log in by putting in the email associated with the account and the password you created when you first created the account. Once you have filled in the correct information, click the "Sign In" button. MWG does not store passwords. If you are registered, but forgot your credentials; click the "Forgot Password" link below the "Sign In" button.

To Reset Your Password

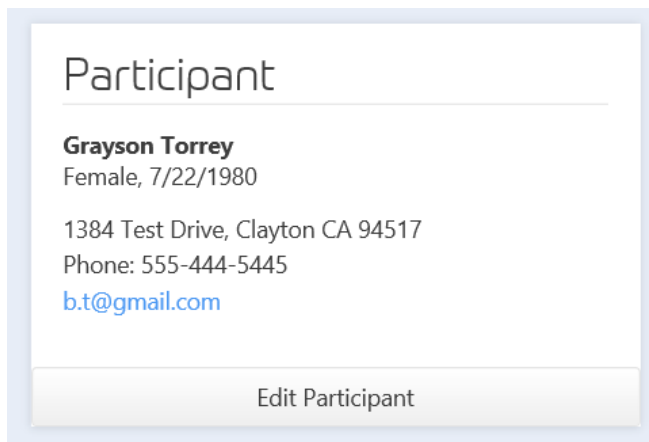
You will be asked to enter either your Username or the Email Address tied to the account. Once you click the “Send Reset Password Link”, a temporary password will be sent to that email address. You will be able to gain access to the portal and reset your password.



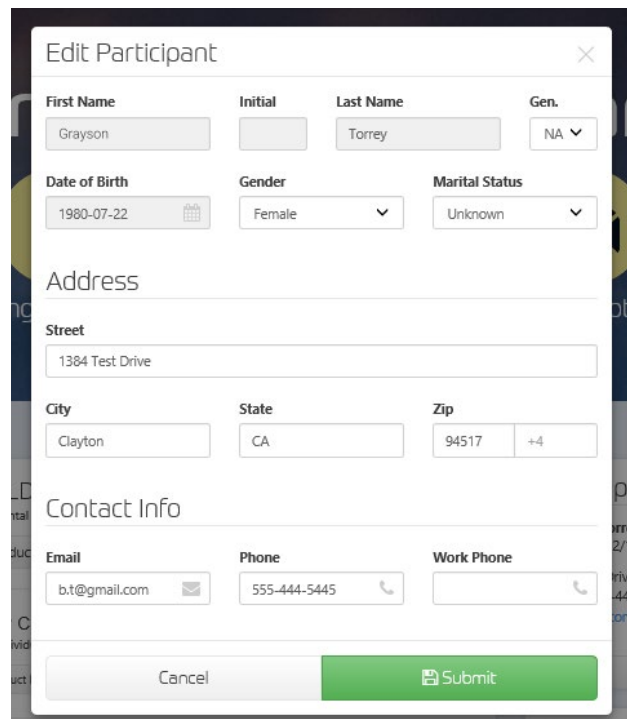
The screenshot shows the 'Reset My Password' page of the MWG PORTALS system. At the top is the MWG PORTALS logo. Below it, the title 'Reset My Password' is displayed. A paragraph explains that users can reset their password by providing information, and that they will receive an email with a link to generate a new temporary password. There is a text input field labeled 'Enter Your User Name or Email Address' and a blue button labeled 'Send Reset Password Link'. At the bottom, there is a copyright notice '© 2016 MWG Web Portals' and a link 'Return to Login'.

Participant Information

In the Participant area, there are three sections of information: Demographic, Address, and Contact. This is populated with what we have in our system. Click “Edit Participant” to update information.



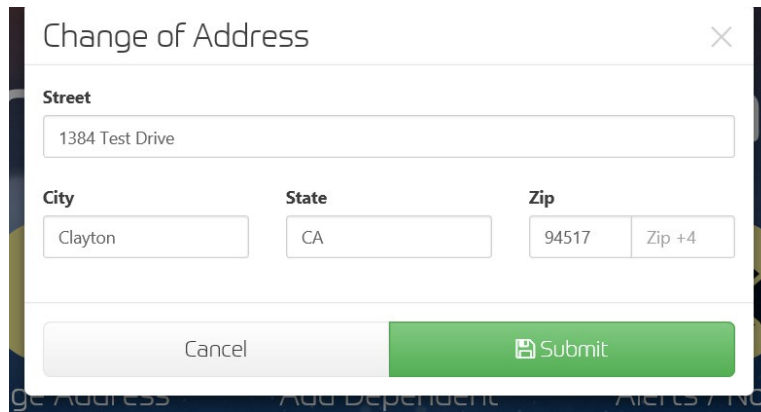
The screenshot shows a 'Participant' information card. It has a title 'Participant' and a summary for 'Grayson Torrey', a female born on 7/22/1980. Below this, the address '1384 Test Drive, Clayton CA 94517' and phone number '555-444-5445' are listed, along with the email 'b.t@gmail.com'. At the bottom is a button labeled 'Edit Participant'.



The screenshot shows the 'Edit Participant' form. It contains several sections: 'First Name' (Grayson), 'Initial' (empty), 'Last Name' (Torrey), and 'Gen.' (NA). Below these are 'Date of Birth' (1980-07-22), 'Gender' (Female), and 'Marital Status' (Unknown). The 'Address' section includes 'Street' (1384 Test Drive), 'City' (Clayton), 'State' (CA), and 'Zip' (94517). The 'Contact Info' section includes 'Email' (b.t@gmail.com), 'Phone' (555-444-5445), and 'Work Phone' (empty). At the bottom are 'Cancel' and 'Submit' buttons.

Change of Address

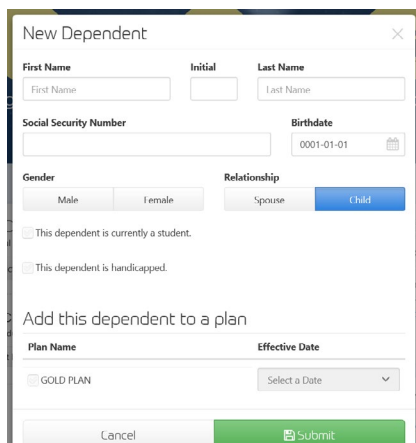
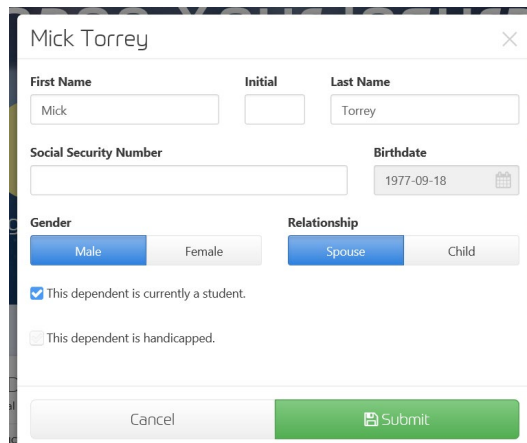
There are two places that you can change your address. The first is in the Change of Address link on the home page. The second is in the Participants area when you click “Edit Participant”

A screenshot of a "Change of Address" form. The form has a title bar with a close button. It contains three input fields: "Street" with the value "1384 Test Drive", "City" with the value "Clayton", and "State" with the value "CA". There are also "Zip" and "Zip +4" fields, both empty. At the bottom, there are two buttons: "Cancel" and "Submit".

When you make edits or changes to your address, a service ticket is sent to our Eligibility Department. One of our Customer Service representatives will contact you and verify that your product is still available in the new state/zip code entered. They will work with you to choose another option or terminate your current product if it is not sold in this new zip code.

If you update anything, there will be a confirmation page with the new data displayed in **bold letters**. This lets you confirm the edit before it goes into our system. The change is instant and tracked.

Dependents

A screenshot of a "New Dependent" form. It has a title bar with a close button. The form contains several input fields: "First Name", "Initial", "Last Name", "Social Security Number", and "Birthdate". There are also "Gender" and "Relationship" dropdown menus. At the bottom, there are two buttons: "Cancel" and "Submit".A screenshot of a dependent profile for "Mick Torrey". It has a title bar with a close button. The form contains several input fields: "First Name", "Initial", "Last Name", "Social Security Number", and "Birthdate". There are also "Gender" and "Relationship" dropdown menus. At the bottom, there are two buttons: "Cancel" and "Submit".

The Dependent area will display all dependents currently listed. If you do not have any, it will say “None”. There is also a place to add a dependent(s) if you wish to do so.

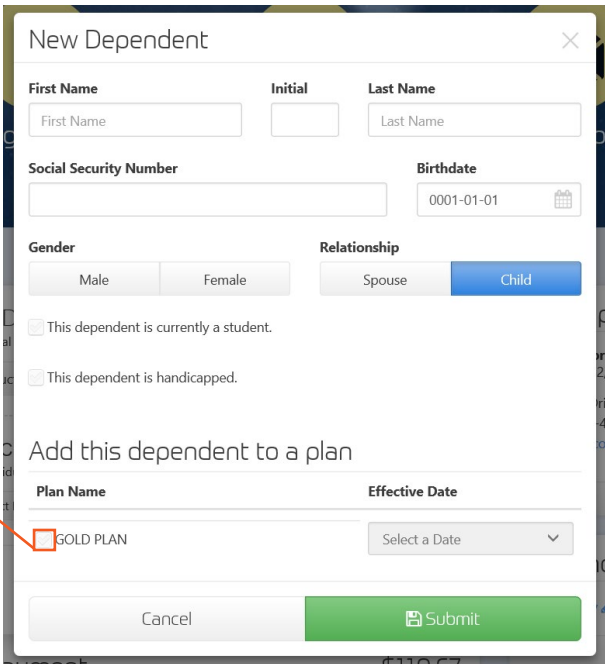
There are 4 things to make note of here:

1. You can add/delete a dependent (child/spouse) to an available (active) product.
2. You can click on the name of a current dependent listed and edit their data.
3. You can view the product(s) a dependent is enrolled.
4. You can view available products and enroll a dependent.

When you click on the dependent’s name, it will open their profile for edits. Date of Birth is not able to be edited since it affects eligibility.

To Enroll a New Dependent into a policy

When you click “Add a Dependent”, at the bottom of the pop-up, you will see an area that will list any plans that you are enrolled in. If you wish to add the dependent to a policy, simply click the checkbox next to the desired plan and click “Submit”.



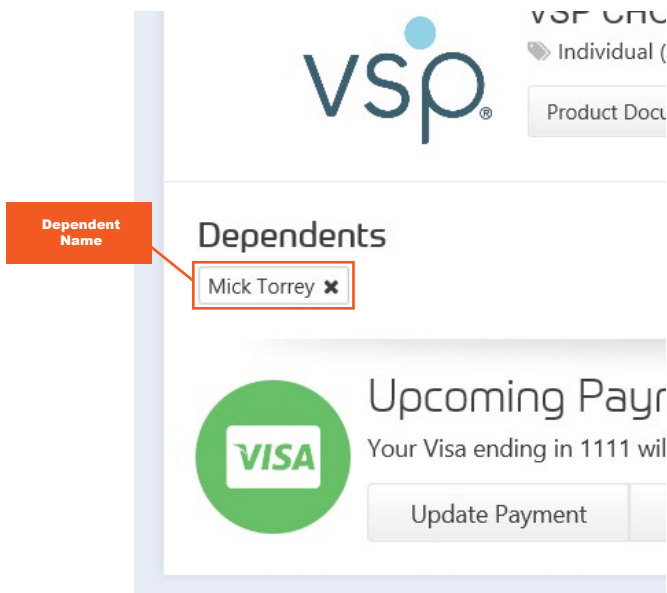
The "New Dependent" form contains the following fields and options:

- First Name:** Text input field.
- Initial:** Text input field.
- Last Name:** Text input field.
- Social Security Number:** Text input field.
- Birthdate:** Date picker (example: 0001-01-01).
- Gender:** Radio buttons for Male and Female.
- Relationship:** Radio buttons for Spouse and Child (Child is selected).
- ☐ This dependent is currently a student.
- ☐ This dependent is handicapped.
- Add this dependent to a plan:**
 - Plan Name:** List with "GOLD PLAN" and a checkbox.
 - Effective Date:** Date picker (example: Select a Date).
- Buttons:** Cancel and Submit.

An orange callout box labeled "Plan Check Boxes" points to the checkbox next to "GOLD PLAN".

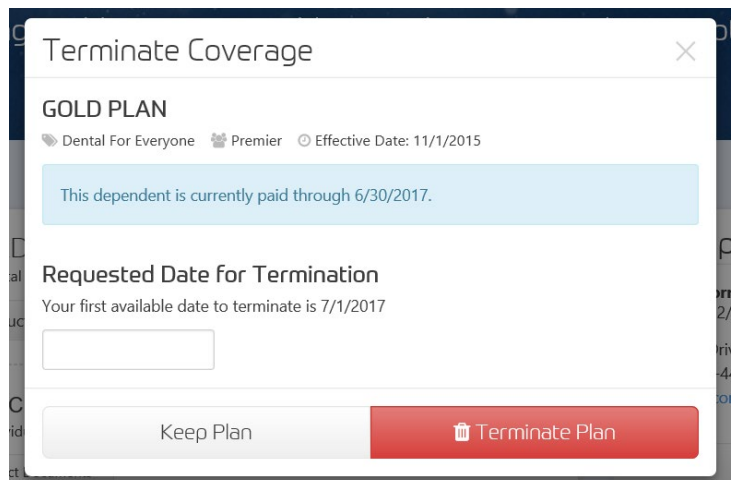
To Terminate a Dependent Policy

When you are looking at the plan, click the name of the dependent that you wish to terminate. A module will appear. Please enter the correct information and click “Terminate Plan”.



The VSP OneDependents page shows:

- Dependents:** A list with "Mick Torrey" (highlighted by an orange callout box labeled "Dependent Name").
- Upcoming Payr:** A section with a VISA logo and the text "Your Visa ending in 1111 will".
- Buttons:** Update Payment.

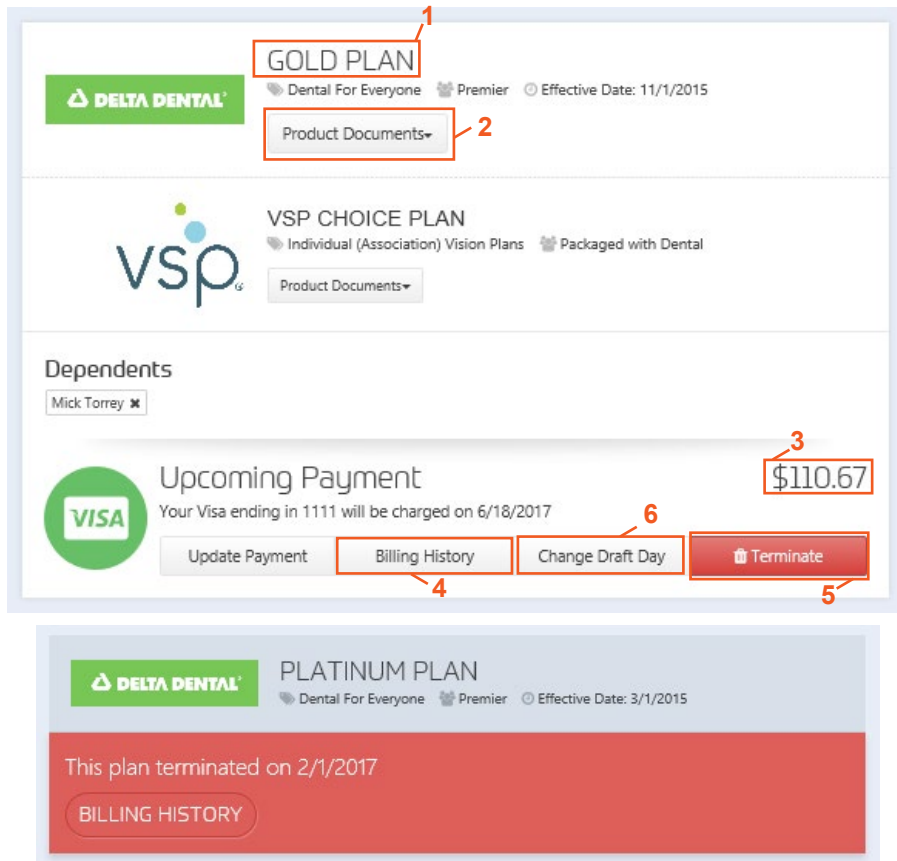


The "Terminate Coverage" module for the "GOLD PLAN" includes:

- Plan Details:** Dental For Everyone, Premier, Effective Date: 11/1/2015.
- Status:** This dependent is currently paid through 6/30/2017.
- Requested Date for Termination:** Your first available date to terminate is 7/1/2017.
- Buttons:** Keep Plan and Terminate Plan.

Products

When you get to the home page, you will see a list of your enrolled products. You are active if the product has a white background. Any terminated products will have a grey background with a red "Terminate" bar.



1. The current plan enrolled in, the name/type, the "Effective" date of your policy
2. Product Documents-This is where any product-related documents can be found. ex. Welcome Letter/ID card, etc
3. Upcoming Payment Amount
4. Billing History- Click this button to see your billing history to date. (Referenced on Page 7.)
5. Terminate Policy button-Click to terminate your policy.
6. Change Draft Date button- If you want to change the draft date on your plan, you can click the Change Draft Day tab and select a new day from the drop-down menu.
 - A draft may take 1-3 business days to process. If the draft date falls on a holiday or weekend, the draft will occur within 1-3 business days. You will also be provided a visual of the next 3 possible draft dates.
 - Once a draft date is selected, your account status will change to "Pending". You will not be able to make any more changes to the draft date until the current requested change has been completed.
 - Please be advised, some rare occasions could apply with the date you pick that causes the original draft and the newly chosen draft date to draft your account twice. (Referenced on Page 7.)

Billing History

Showing 1 to 10 of 41			
Insurance Plan	Coverage Month	Date Paid	Amt. Paid
GOLD PLAN	June 2017	5/18/2017	\$91.28
Packaged Vision	June 2017	5/18/2017	\$19.39
GOLD PLAN	May 2017	4/18/2017	\$82.04
Packaged Vision	May 2017	4/18/2017	\$19.39
GOLD PLAN	April 2017	3/20/2017	\$82.04
Packaged Vision	April 2017	3/20/2017	\$19.39
GOLD PLAN	March 2017	2/20/2017	\$82.04
Packaged Vision	March 2017	2/20/2017	\$19.39
GOLD PLAN	February 2017	1/27/2017	\$82.04
Packaged Vision	February 2017	1/27/2017	\$19.39
		Previous	1 2 3 4 5 Next

Change Draft Days

Select a Draft Day ×

\$110.67 per month

What day of the month would you like this payment to be drafted?

Please select the day of the month you would like your payments to be drafted. Your next payment is scheduled to draft on or around the 18th of the month.

18th

▼

of each month.

Based on your selection, your payment will be drafted on the following dates, subject to holidays and weekends. If the draft date falls on a holiday or weekend, the payment will be drafted on the next business day.

Please note: if you change your draft date after the date has been scheduled, your account may be drafted twice for that month.

Cancel

Submit

Payments

Payment Methods

Credit Card

Bank Draft

Cardholder Name
Grayson F Torrey

Card Number
*****111

Exp. Date
12/2019

Card Type
MasterCard AMERICAN EXPRESS VISA DISCOVER

Check any of your additional product(s) you would like to associate with this payment type.

☒ GOLD PLAN

If you need to update your payment information (editing current information, adding a bank account or credit card, etc.) you can choose the "Update Payment" button (beneath "Dependents" in the product area). If it is a discount packaged product, you can change the parent product (which is the dental) and it will change the charge on the whole package. If you have multiple products, you must edit each product (since they are under different carriers). It will not be universally changed for all products. If the product you have listed is terminated, the "Update Card" button (or other type of payment) will appear for 30 days. You have that time to reinstate by updating the payment method. You will need to call in to customer service to discuss a terminated product after the 30 days have passed. If you are delinquent and the product is on HOLD, once your payment is updated, a ticket will be issued to our eligibility department who will review your account and change it to pending, so your payment will draft within 5-7 business days after it is changed in the portal.

When you choose "Update Payment" on a product, you will see the current payment type being used and you will have a drop-down option in order to add a bank account/credit card as a new form of payment. Add it and then you can select the new option from the drop-down menu. It will now display once the page has been refreshed. You will need to click save. It will take out the old method and populate the fields with the new method.

Documents

If there is any correspondence from our company to you, concerning your policy, it will appear in the "System Docs" area and will have a description next to it and a date. When the link is clicked, it will open the file as a PDF. This can include, but is not limited to, EOC's, Rate Increases, End of the Year Tax Letters, etc. (Note: These are all in PDF format, so the client MUST have Adobe Acrobat on their computer in order to access these documents. They can download this for free on the internet).