Billing.SelmanCo.Com Training Manual

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How to Access Billing.SelmanCo.Com:

IP Address:

https://billing.selmanco.com

Compatible Browsers:

- **Chrome** User Guide (Recommended Browser)
- **Safari** User Guide
- **Firefox** User Guide
- **Edge** User Guide

How to log into billing.selmanco.com:

To log into billing.selmanco.com, follow these steps:

1. Type in https://billing.selmanco.com into your browser (we recommend Chrome)
2. The secure login page will appear
3. Type in your assigned username
4. Type in your password
5. Click submit

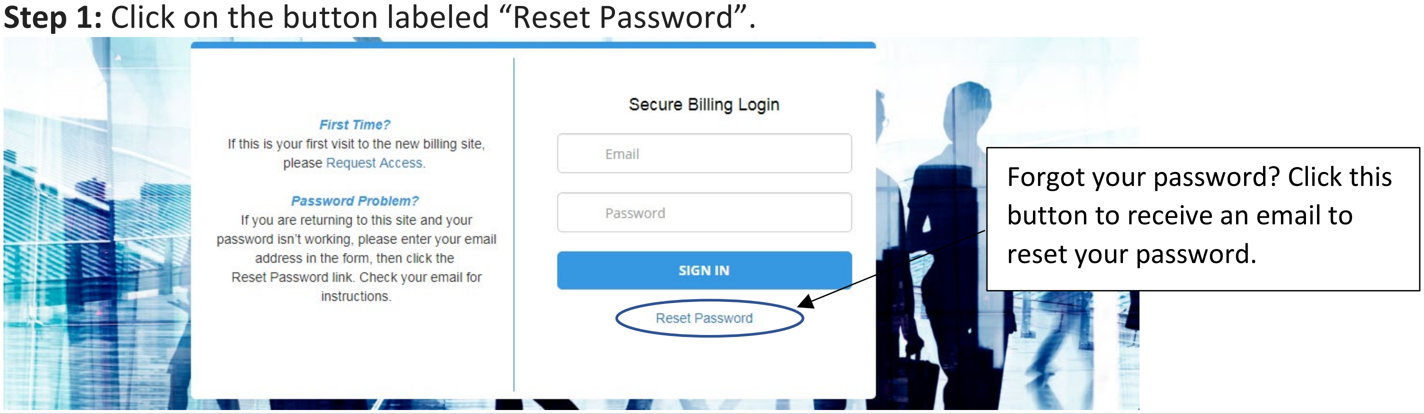
How to Reset Your Password:

To reset your password, follow these steps:

1. Click on the button labeled “Forgot Password”
2. A blue box will now appear below the “Forgot Password” button, that reads **“We’ve just sent you an email to reset your password”**
3. You will receive an email from ‘Tricare WebInvoice’. *Please make sure to check your junk mail folder if you don’t receive the email*
4. In the email, click on the button labeled “Click Here”
5. You will now be redirect to billing.selmanco.com. Your screen will show a box that reads “Change Password”. Complete the following fields:
    a. Your New Password
    b. Confirm Your New Password
6. Once you have entered your new password, click on the blue arrow button to process your password change. You will see a confirmation message that confirms your password change.

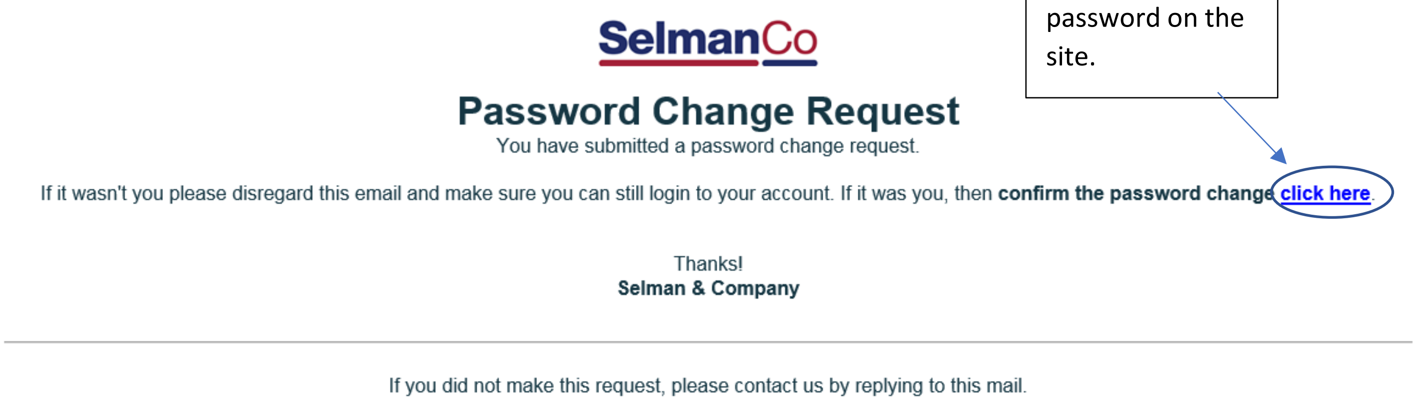
Visual Example on How to Reset Your Password:

Step 1: Click on the button labeled “Reset Password”.



Step 2: You will receive an email from Tricare WebInvoice.

Click here to change your password on the site.


SelmanCo

Password Change Request

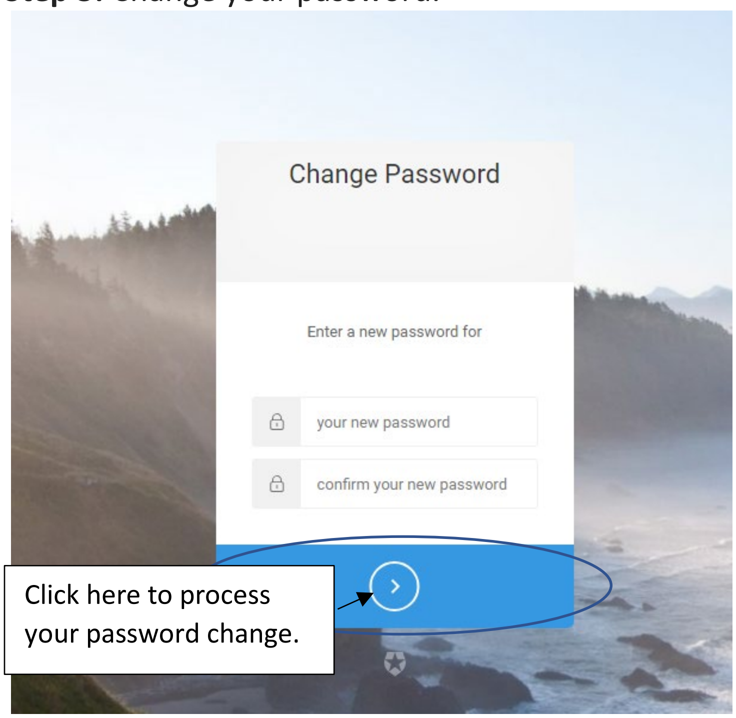
You have submitted a password change request.

If it wasn't you please disregard this email and make sure you can still login to your account. If it was you, then **confirm the password change** click here.

Thanks!
Selman & Company

If you did not make this request, please contact us by replying to this mail.

Step 3: Change your password.



Click here to process your password change.

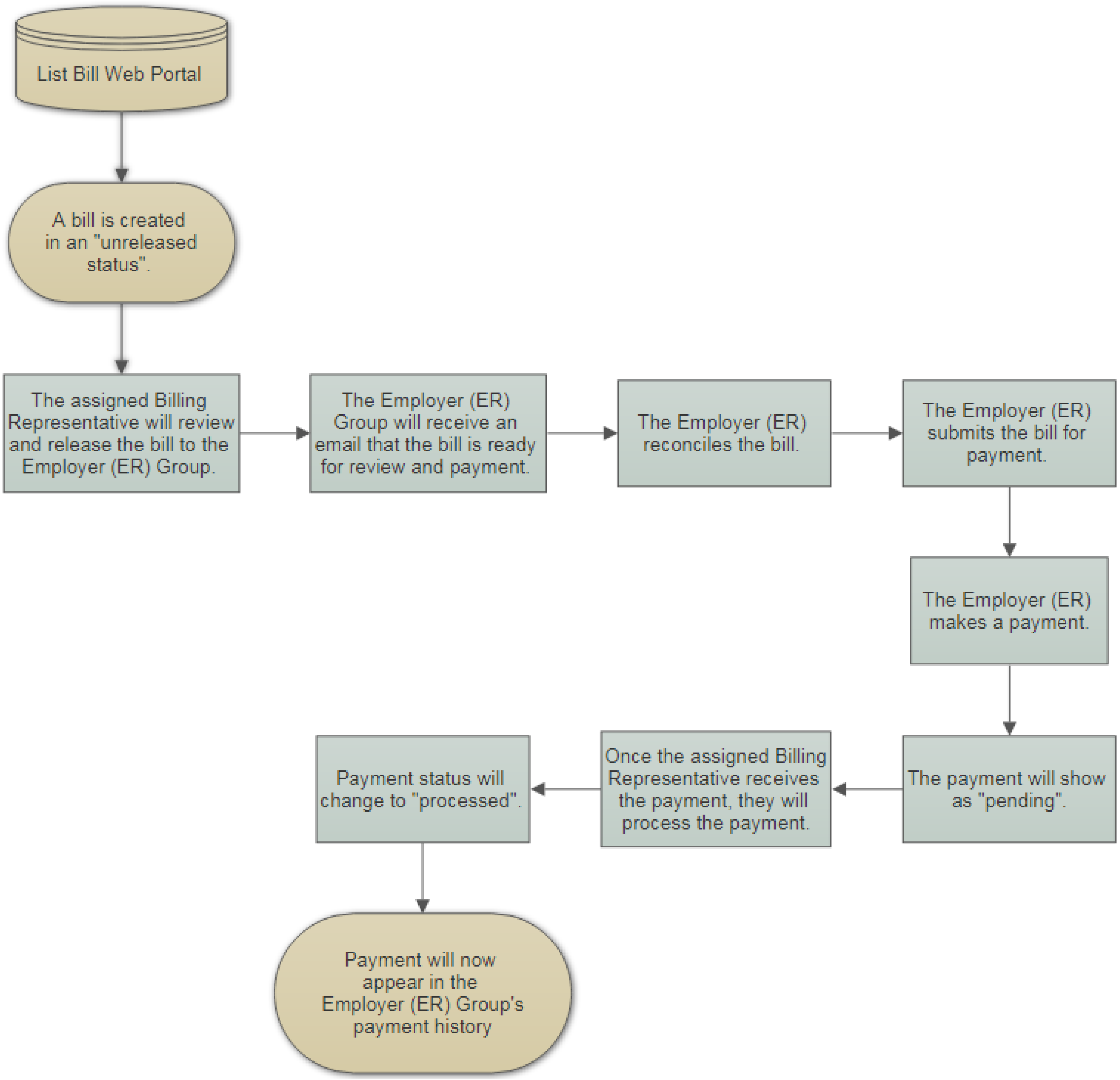
Your password must follow these guidelines:

- At least 8 characters in length
- Contain at lease 3 of the following types of characters:
  - Lower case letters (a-z)
  - Upper case letters (A-Z)
  - Numbers (i.e 0-9)
  - Special characters (e.g.!@#$%^&*)

Step 4: You will receive a confirmation message instructing you on how to get back to the site.

Overview

This is how bills are processed on the billing site:

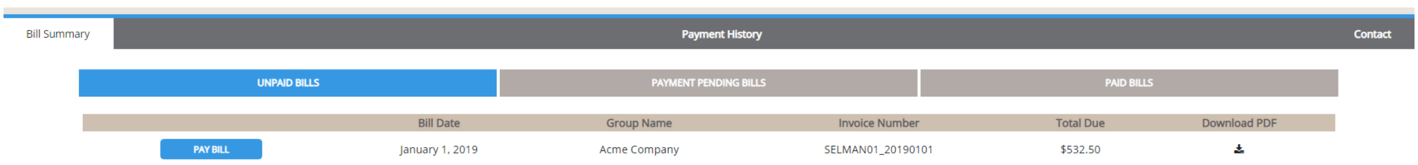


Bill Summary Main Tab:

The purpose of the “Bill Summary” tab is to give the user quick access to unpaid bills, payment pending bills and paid bills.

This tab gives the user access to the following subtabs:

- **Unpaid Bills:** The user can view and/or pay their unpaid bills for their accounts.
- **Payment Pending Bills:** The user can view payments that have been submitted within the List Bill Web Portal. They will appear in a pending status until a payment is received by the assigned Billing Representative.
- **Paid Bills:** The user can view paid bills within the List Bill Web Portal. This screen will only show paid bills once the assigned Billing Representative has processed the received payment on their end.



What is the purpose of the “Unpaid Bills” subtab?

The user can view and/or pay their unpaid bills for their accounts. This screen will only show unpaid bills once they have been released by the assigned Billing Representative.

How do I download the unpaid bill?

1. Click on the tab labeled “Bill Summary”.
2. Click on the subtab labeled “Unpaid Bills”.
3. Locate the correct unpaid bill you wish to download.
4. Click the button labeled “Reconcile & Pay”.
5. Click on the link labeled either: Download Bill to Excel OR Download Bill to PDF
6. The bill will download onto the device you are utilizing.
7. Currently the bill will download in an Excel or PDF format.

How do I view a more detailed version of an unpaid bill?

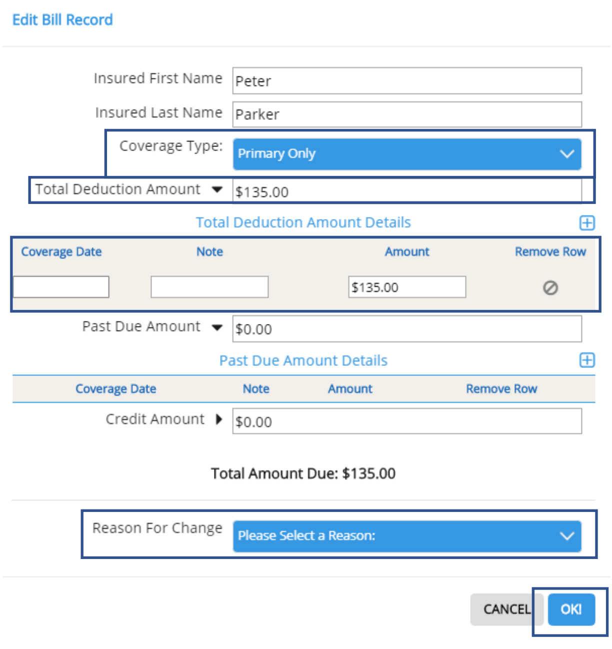
1. Click on the tab labeled “Bill Summary”.
2. Click on the subtab labeled “Unpaid Bills”.
3. Locate the correct unpaid bill you wish to pay.
4. Click on the blue button labeled “Reconcile & Pay”.
5. This will take you to a detailed version of the bill.

How do I change coverage for an existing employee?

1. Follow the steps on how to view a more detailed version of an unpaid bill.
2. Locate the correct employee.
3. Click on “edit” in the section labeled “Actions”.
4. A pop-up box will appear on the screen.
5. In the section labeled “Coverage Type”, choose the new coverage type from the drop-down box.
6. Locate the section labeled “Total Deduction Amount”.

7. Type the new deduction amount.
8. Hit the "Tab" button to add details.
9. Enter a Coverage Date: this will be the effective date of change.
10. Explain the coverage change in the section labeled "Notes".
    a. Example: Primary and Spouse
11. In the section labeled "Reason for Change", select the reason for the change.
    a. Example: "Add" – Changing Coverage from Primary Only to Primary and Spouse
12. Once you are done, select the "Ok" button to apply your changes.

Visual Example:



Step 1: Change the **Coverage Type** to reflect the new coverage

Step 2: Change the **Total Deduction Amount** to reflect the new deduction amount

Step 3: Add **deduction details** that explain the change

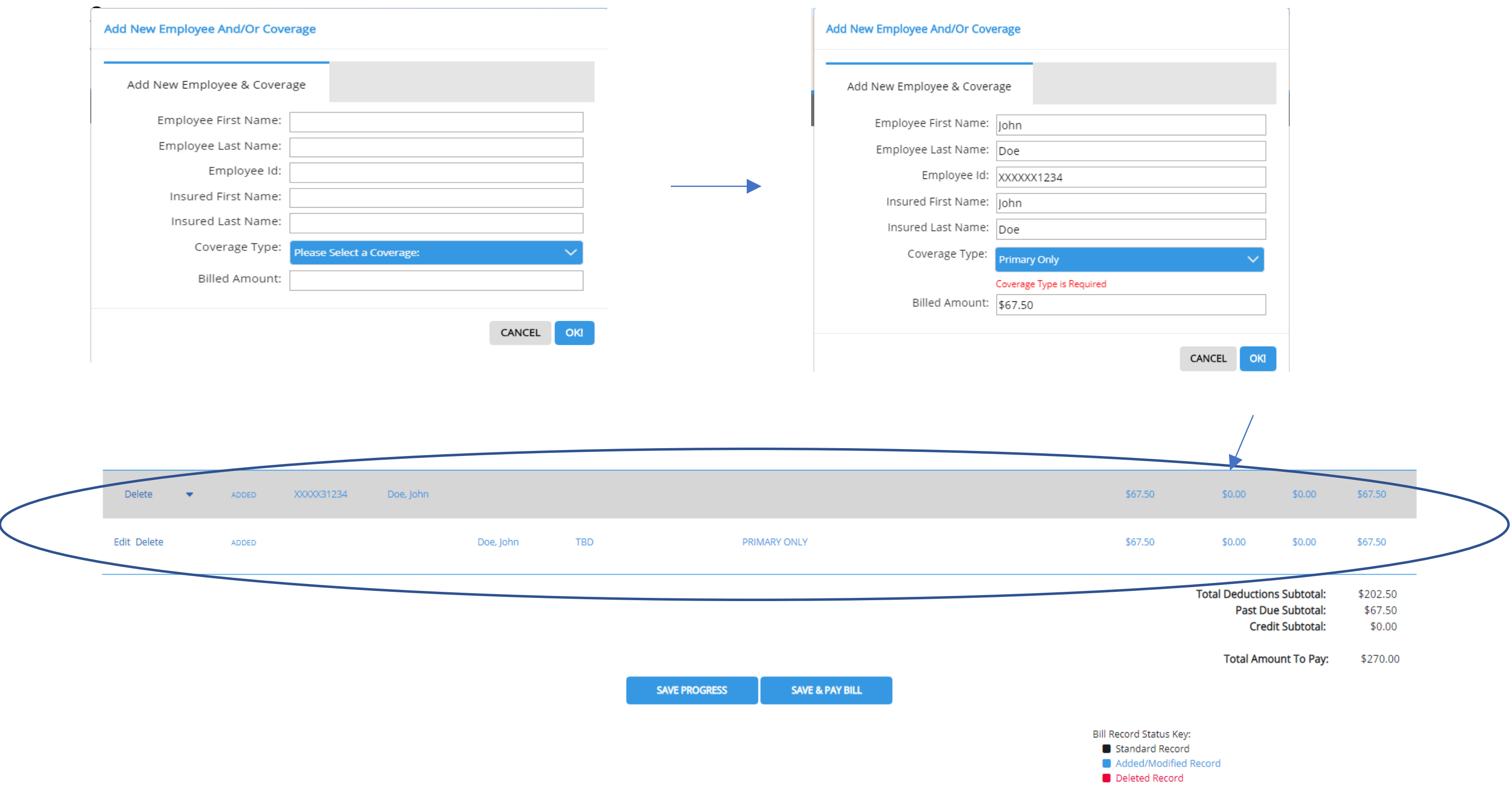
Step 4: Select a **reason for the change**

Step 5: Select **Ok!** to apply the change to the bill

How do I add a completely new employee to the bill?

1. Follow the steps on how to view a more detailed version of an unpaid bill.
2. Click on the link labeled "Add Employee/Coverage".
3. A pop-up box will appear on the screen.
    a. The user will utilize the section labeled "New Employee".
4. Fill in the following fields:
    a. Employee First Name
    b. Employee Last Name
    c. Employee Id
    d. Insured First Name
    e. Insured Last Name
    f. Select the Coverage Type
    g. Enter the billed amount
5. Once you have completed all the necessary fields, click the "OK" button to save your changes on the bill.
6. The new employee will now appear on the bill. (See example below).
    a. The change status for the new employee will show "Added".
7. Select the button labeled "Save Progress".

Visual Example:

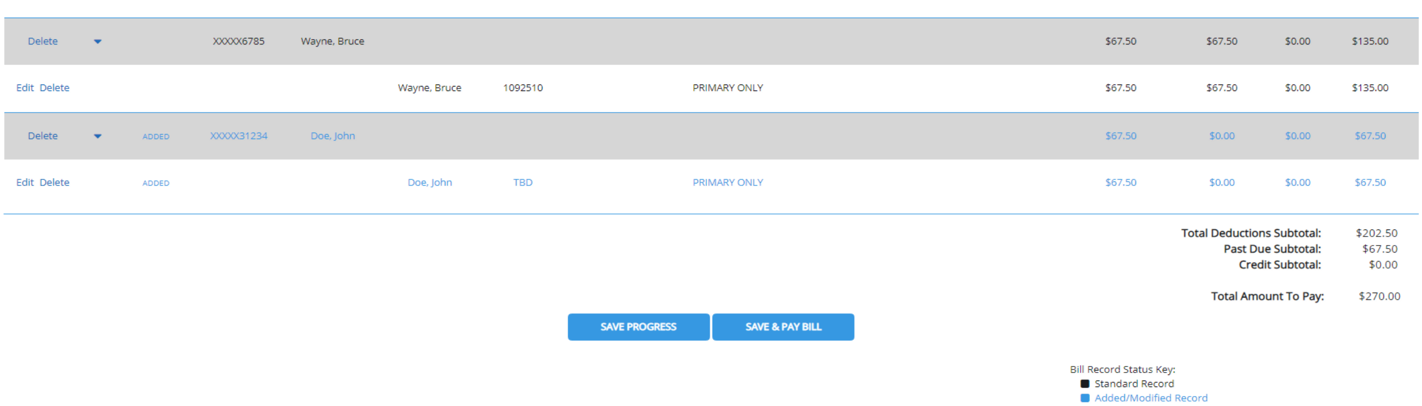


Will I see a change to the bill amount once I add an employee/coverage?

Yes, a user will now see the new employee and/or coverage listed on the bill, and the total amounts for the bill will reflect the change.

- On the bill, the new employee and/or coverage will be displayed in blue font. According to the "Bill Record Status Key" at the bottom of the screen, blue font means "Added/Modified Record".
- The following totals will update to reflect the change:
    a. Total Deductions Subtotal
    b. Credit Subtotal
    c. Total Amount to Pay

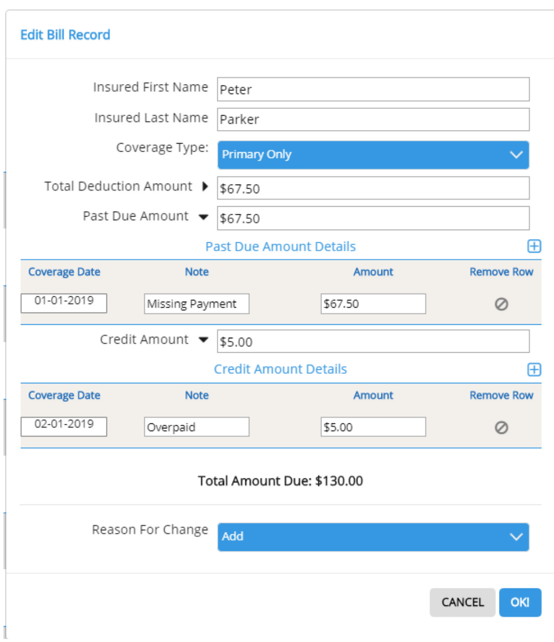
Visual Example:

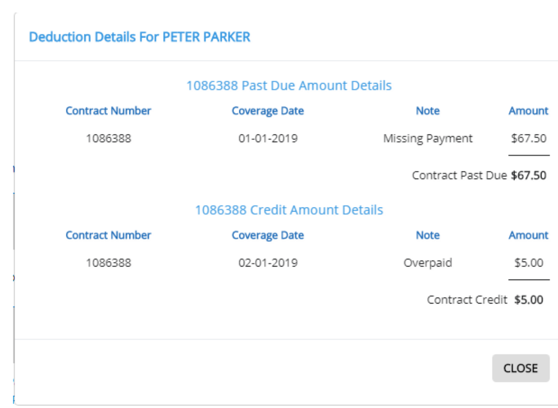


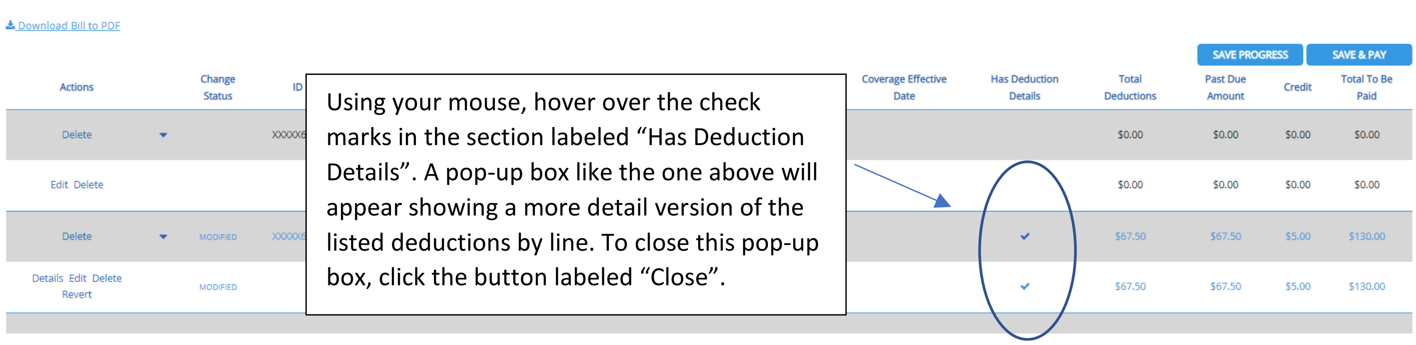
How do I add credits and/or past due amounts?

1. Follow the steps on how to view a more detailed version of an unpaid bill.
2. Locate the insured you wish to add the credit and/or past due amount to.
3. Click ‘Edit’ next to the insured you want to change/modify
4. A pop-up box will appear on your screen labeled “Edit Bill Record”
5. Enter past due and/or credit amount.
6. Click the “Tab” button.
7. The “Past Due Amount Details” drop down will appear. Fill in the following fields:
    a. Enter coverage date.
    b. Enter note.
8. Repeat above steps for the Credit Amount section if needed.
9. Select a reason for change in the drop-down box.
10. Click “OK!”.
11. Record now shows as ‘modified’.
12. The section labeled “Has Deduction Details” shows a check mark.
13. Select the button labeled “Save Progress”.

Visual Example:





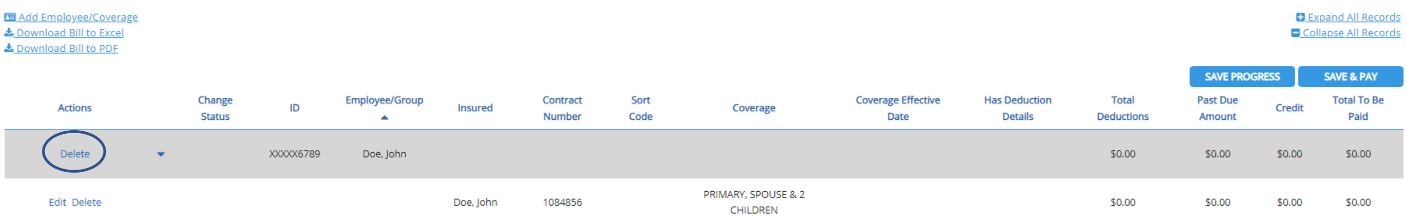


How do I delete an employee from the bill?

1. Follow the steps on how to view a more detailed version of an unpaid bill.
2. Locate the correct employee on the bill.
    a. The user may utilize the search bar. **Please note:** *Searching by first name OR last name only will give the most accurate results when searching by name.*
3. Next to the correct employee record on the bill, the user will see the option to delete the employee.
4. Select the "delete" button.
5. If this is an existing employee, a pop-up box will appear. Select the reason for change from the drop-down box. Click "OK!" to apply the change to the bill.
6. The employee will no longer appear on the bill.
    a. Please note: Once the employee is deleted, the total amounts will reflect the change. (Please example below).
7. Select the button labeled "Save Progress".

*** If an employee is deleted in error you can hit the "Revert" under Actions and the employee will be added back onto the bill. ***

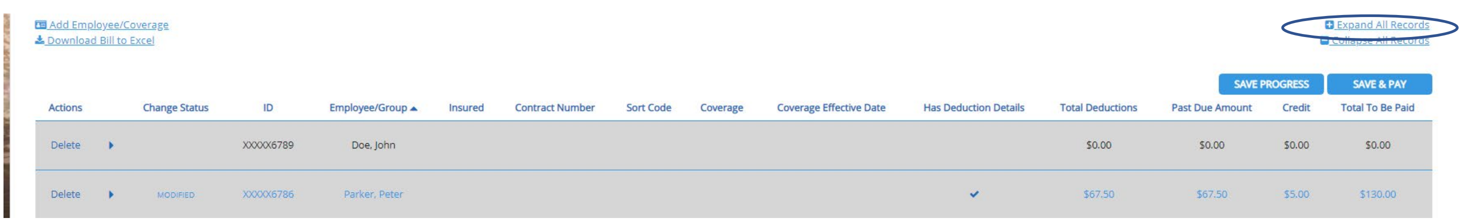
Visual Example:



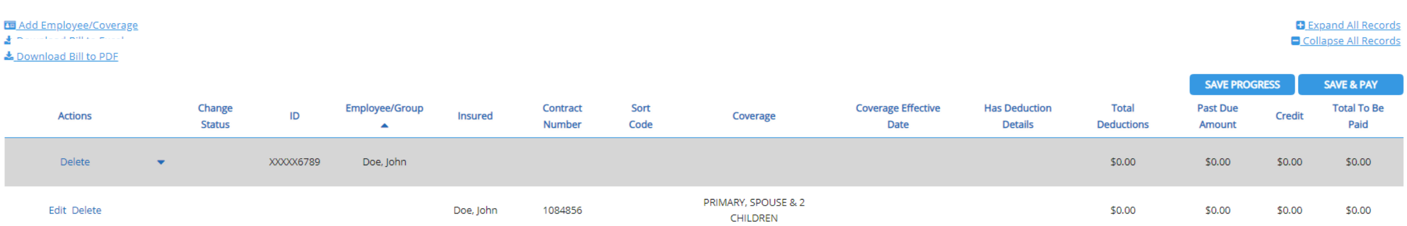
How do I expand all records on the bill?

A user can expand all records on a bill by following these steps: Please Note: This function will only work if the records are collapsed.

1. Click on the link labeled "Expand all Records".



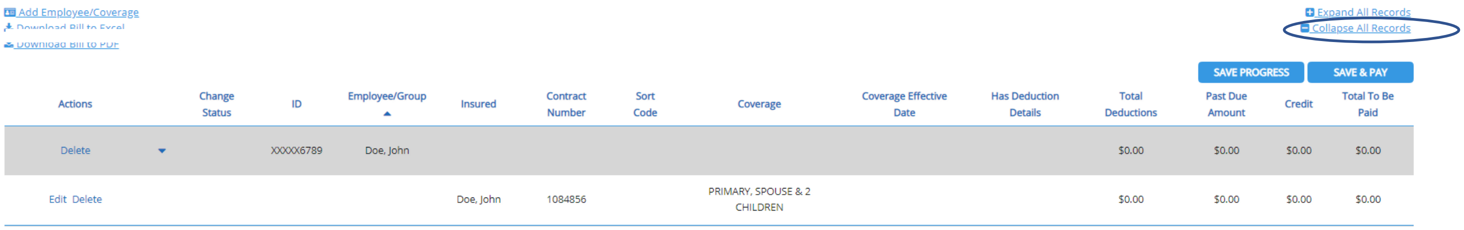
2. The records will now be expanded to show more information.



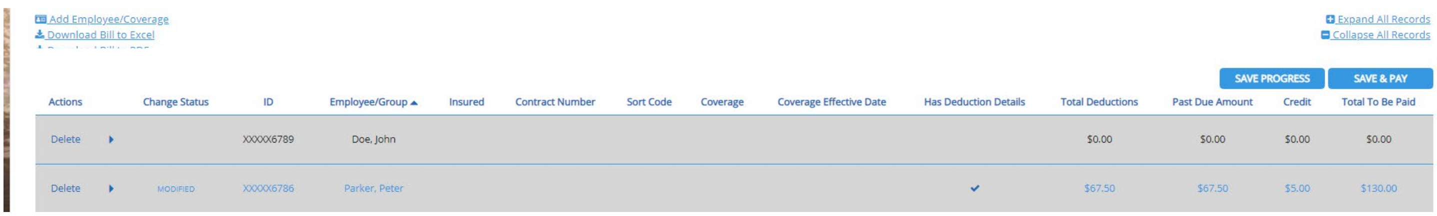
How do I collapse all records on the bill?

A user can collapse all records on a bill by following these steps: Please Note: This function will only work if the records are expanded.

1. Click on the link labeled "Collapse all Records".



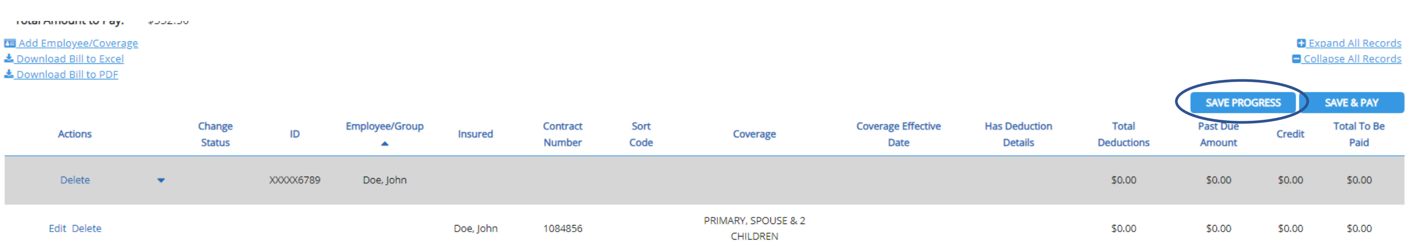
2. The records will now be collapsed.



How do I save my progress on the bill?

1. Follow the steps on how to view a more detailed version of an unpaid bill.
2. Make any necessary changes to the bill.
3. Select the button labeled "Save Progress" either at the bottom or the top of the bill.
4. This will save any changes you have made to the bill but will **not** release the bill.

Visual Example:



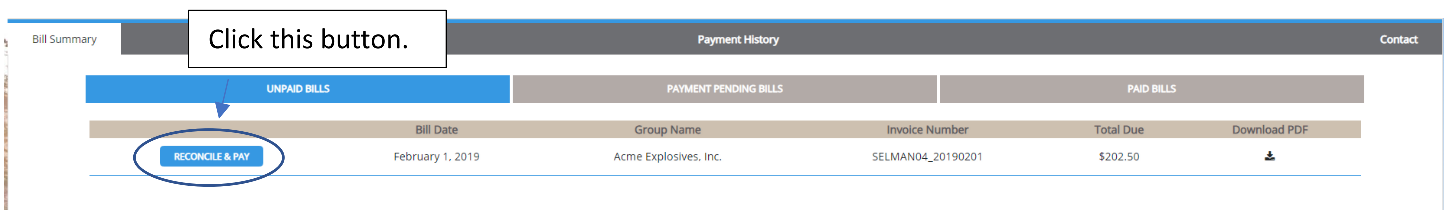
OR!

Once I reconcile a bill, how do I submit a payment?

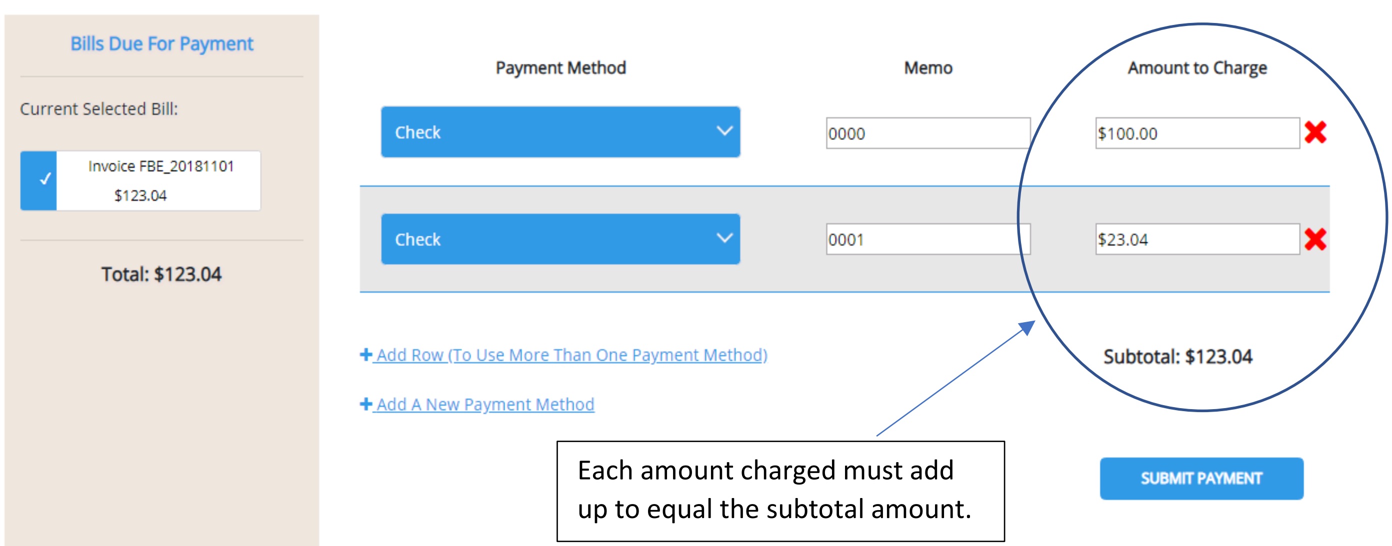
1. Make sure you have completed the steps on how to reconcile a bill listed above.
2. While still on the screen of the detailed version of the bill, click on the button labeled “Save and Pay”.
3. A pop-up box will appear, and it will ask you if you are finished reconciling. If you are, click on the button labeled “Submit Bill for Payment”.
4. This will take you to the payment processing page. Here you will complete the following functions:
    a. Payment Method: Select the choice of payment from the drop-down box.
        i. Check
    b. Memo: If check, type the check number into the memo line.
    c. Amount to Charge: Type in the amount to charge to the select payment method.
    d. Select the link labeled “Add Row (To Use More Than One Payment Method).
        i. This will only be done if there is more than one payment being used. Example: Two checks are sent, one for $100 and one for $23.04. The user must enter both checks into the system. The amounts must equal the subtotal amount, or the system will not process the payment.

2. To submit the payment, click the button labeled “Submit Payment”. The payment will now be sent to the Billing Department to process. Please Note: The payment will not be process unless the Billing Department receives the physical check or other payment method.

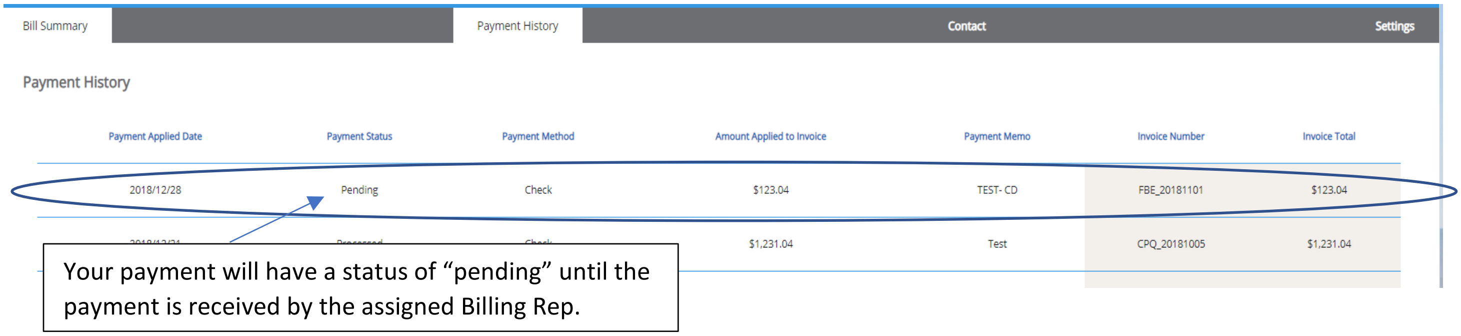
Visual Example of How to Pay a Reconciled Bill:



Once you press the “Pay Bill” button, the screen will refresh to show the below payment screen.



Once you press the “Submit Payment” button, the screen will refresh to show your payment history.



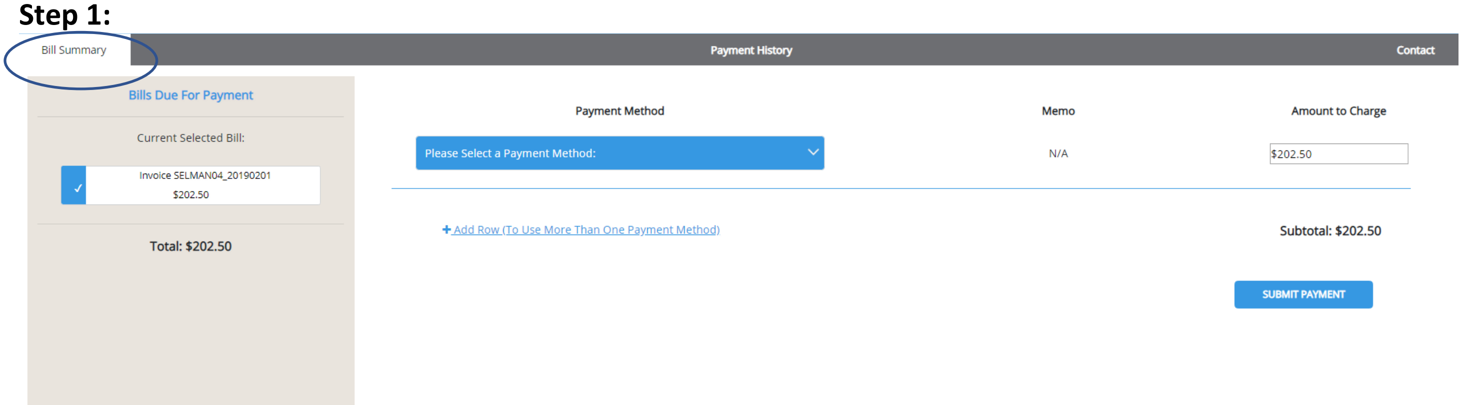
How do I re-open a bill for editing?

Follow these steps:

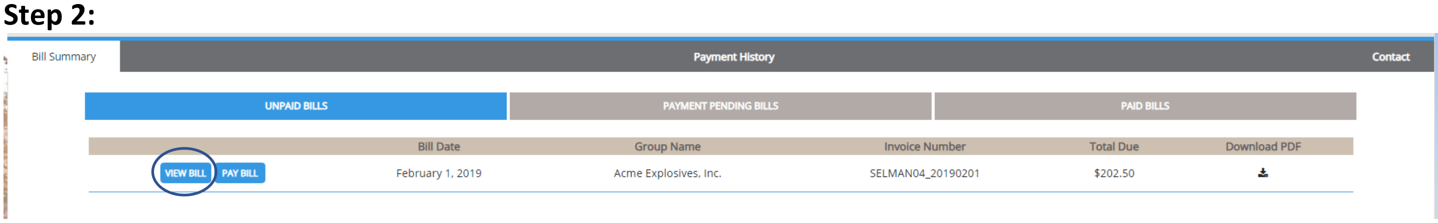
1. Click on the tab labeled “Bill Summary”.
2. Click on the subtab labeled “Unpaid Bills”.
3. Click on the button labeled “View Bill”.
4. Your screen will now refresh to show a detailed version of the payment pending bill.
5. Click on the link labeled “Reopen Bill for Editing”.
6. All functionality will be restored, and you will be able to re-edit (reconcile) your bill once more.

Visual Example:

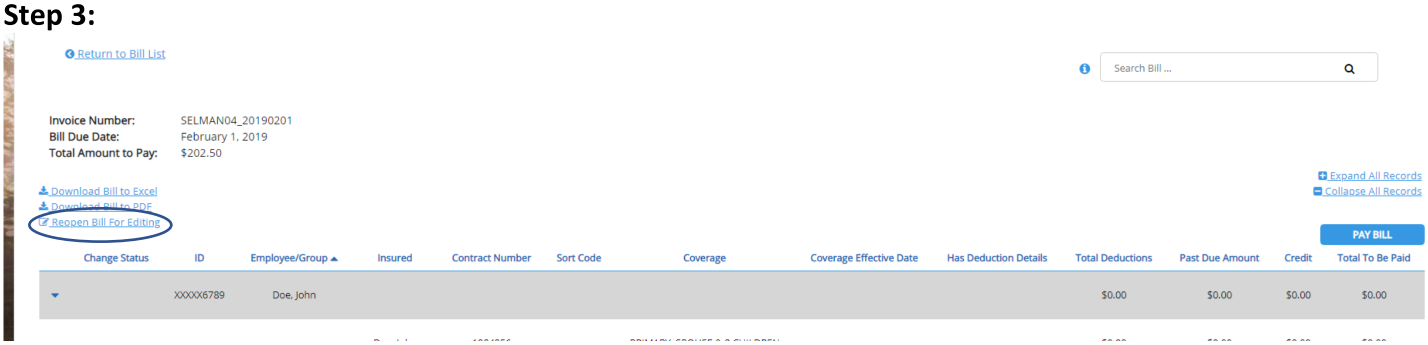
Step 1:



Step 2:

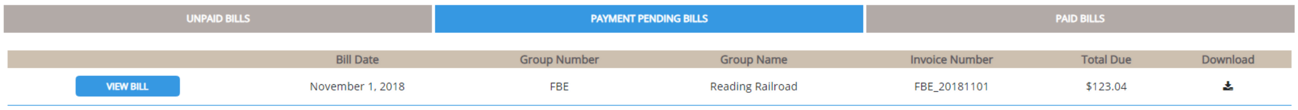


Step 3:



What is the purpose of the “Payment Pending” subtab?

The user can view payments that have been submitted within the List Bill Web Portal. They will appear in a pending status until a payment is received by the assigned Billing Representative.

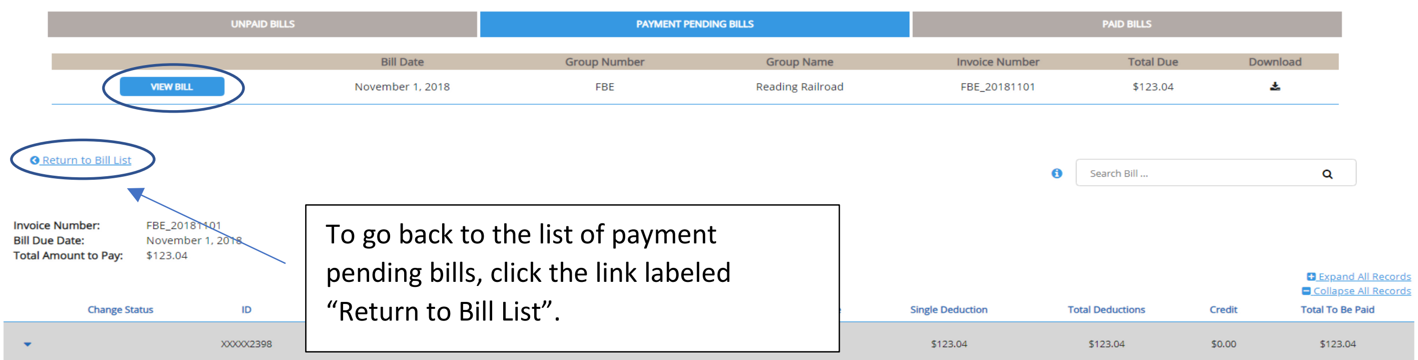


How do I view a bill that is in a payment pending status?

The user can view a bill that has been reconciled and is in a payment pending status by following these steps:

1. Click on the tab labeled “Bill Summary”.
2. Click on the subtab labeled “Payment Pending Bills”.
3. Click on the button labeled “View Bill”.
4. Your screen will now refresh to show a detailed version of the payment pending bill.
5. Since this bill has already been reconciled and is in a payment pending status, changes can no longer be made to the bill.

Visual Example:



What is the purpose of the “Paid Bills” subtab?

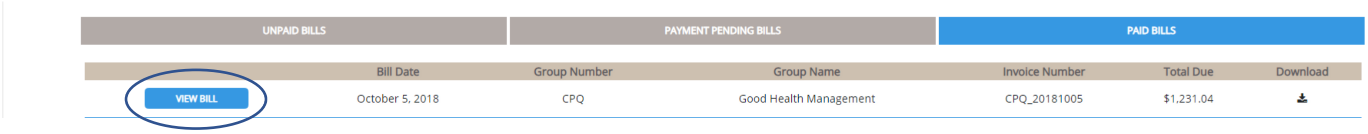
The user can view paid bills within the List Bill Web Portal. This screen will only show paid bills once the assigned Billing Representative has processed the received payment on their end.

How do I view a paid bill?

The user can view a bill that has been paid and processed by the Billing Representative by following these steps:

1. Click on the tab labeled “Bill Summary”.
2. Click on the subtab labeled “Paid Bills”.
3. Click on the button labeled “View Bill”.
4. Your screen will now refresh to show a detailed version of the paid bill.
5. Since this bill has been paid and processed by a Billing Representative, changes can no longer be made to the bill.

Visual Example:



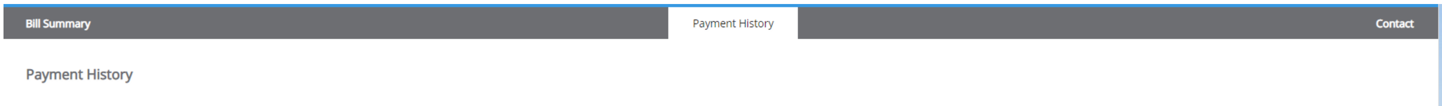
How do I download a paid bill?

A user may download a paid bill by following these steps:

1. Click on the tab labeled “Bill Summary”.
2. Click on the subtab labeled “Paid Bills”.
3. Locate the correct paid bill you wish to download.
4. Click on the symbol in the section labeled “Download”.
5. The bill will download onto the device you are utilizing.
6. Currently the bill will download in an Excel format.

Payment History Main Tab:

The purpose of the “Payment History” tab is to allow the user to view a snapshot their payment history.

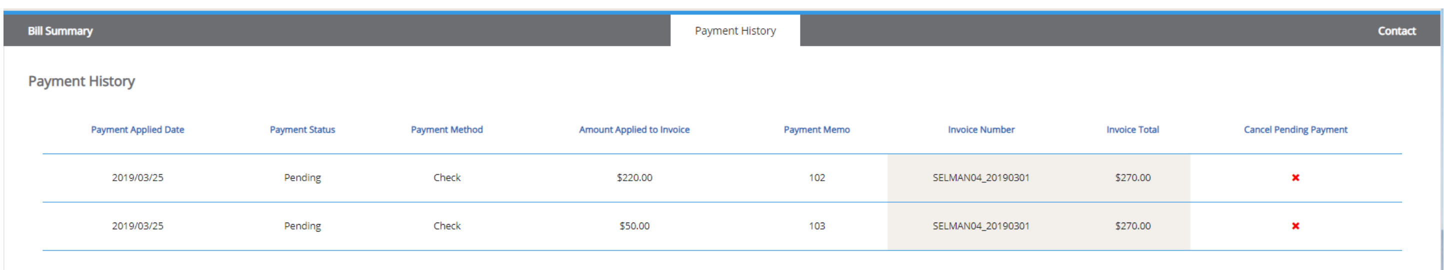


How can a user view their payment history?

The user can view their payment history by following these steps:

1. Click on the tab labeled “Payment History”.
2. Here you will see all payment history for your account.
3. The bills are sorted newest to oldest.
4. Payment status will show the following:
    a. Pending: This means that a payment has been sent by the user, but the Billing Representative has not processed the payment on their end.
    b. Processed: This means that the Billing Representative has received the payment and has processed it through the system.

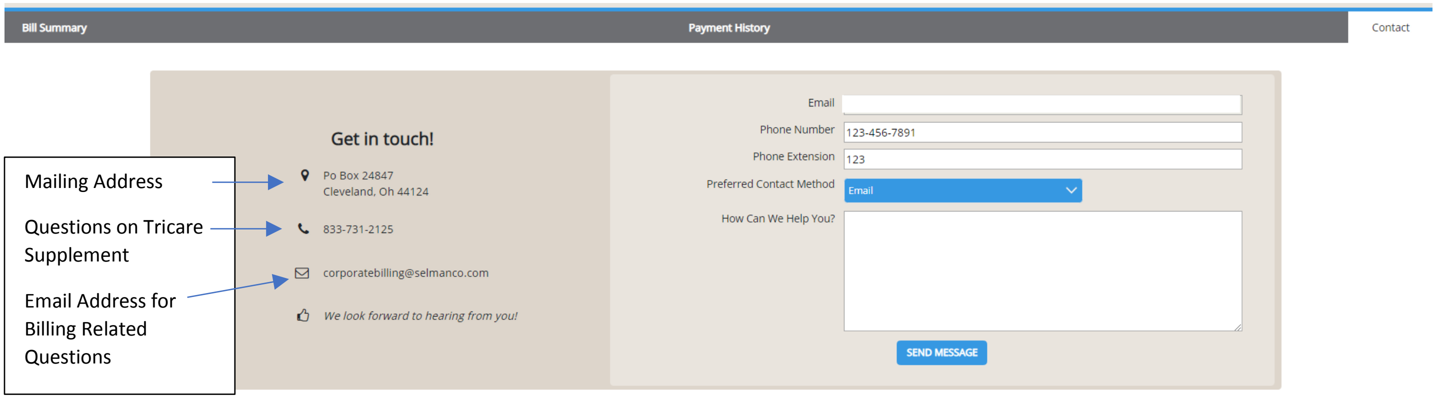
Visual Example:



Payment Applied Date	Payment Status	Payment Method	Amount Applied to Invoice	Payment Memo	Invoice Number	Invoice Total	Cancel Pending Payment
2019/03/25	Pending	Check	$220.00	102	SELMAN04_20190301	$270.00	×
2019/03/25	Pending	Check	$50.00	103	SELMAN04_20190301	$270.00	×

Contact Main Tab:

The purpose of the “Contact” tab is to give the user contact information for a Billing Representative who has been assigned to their group.



How can a user get in touch with a representative?

Compete the following fields:

1. Email (This will default to the one you used to log in with)
2. Phone Number
3. Phone Extension
4. Preferred Contact Method
    a. Email
    b. Phone
5. How Can We Help You?
    a. Please explain your question in as much detail as possible.
6. Once you are done, click the “Send Message” button to process your request.

Important contact information:

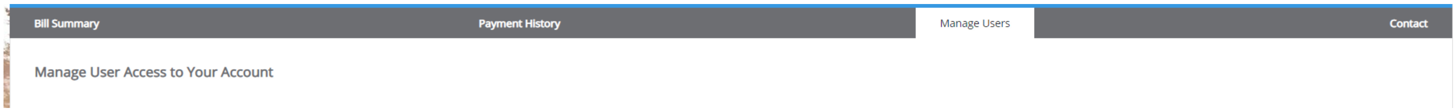
- **Mailing Address:**
  PO Box 24847
  Cleveland, OH 44124

- **Phone Number:**
  833-731-2125
  For questions about TRICARE Supplemental products

- **Email Address for Billing Related Questions:**
  Corporatebilling@selmanco.com

Manage Users Main Tab:

The purpose of the "Manage Users" tab is to give the user the ability to add their own users, manage access levels and delete users from billing.selmanco.com. It is important to note that to have this access, you must be set up as an admin.



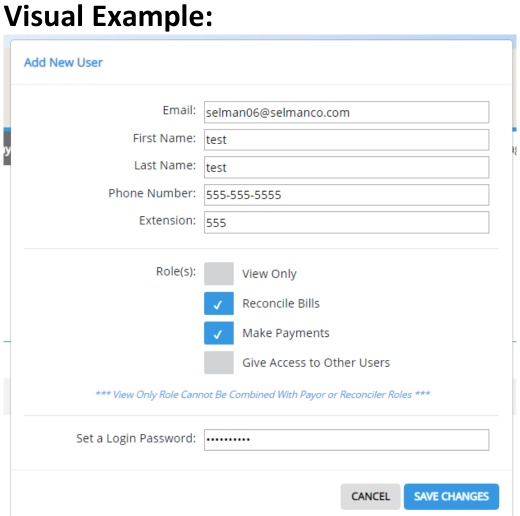
How do I view current users for my account?

1. Click on the main tab labeled "Manage Users"
2. You will now see all the users on your account
3. To find a specific user, you can use the search bar labeled "filter users by email". As soon as you begin to type, the page will refresh to show users matching the criteria you entered

How do I add a new user?

1. Click on the main tab labeled "Manage Users"
2. You will now see all the users on your account
3. Click on the button labeled "Add New User"
4. A box will appear on your screen, complete the following fields:
    a. Email
    b. First Name
    c. Last Name
    d. Phone Number (Important! You must add the dashes when needed (-)
    e. Extension
    f. Roles (Select the access the user will have in the site, you can select more than one field)
        i. View Only *** View Only Role Cannot Be Combined with Payor or Reconciler Roles ****
        ii. Reconcile Bills
        iii. Make Payments
        iv. Give Access to Other Users (admin)
    g. Set a Login Password (Important! The user will need to know this password to log in)
5. Click the button labeled "Save Changes" to successfully add the user

Visual Example:



How do I edit a user?

1. Click on the main tab labeled “Manage Users”
2. You will now see all the users on your account
3. Locate the correct user
4. In the section labeled “Actions”, click the button labeled “Edit”
5. A box will appear on your screen, you can make changes to the following fields:
    a. Email
    b. First Name
    c. Last Name
    d. Phone Number (Important! You must add the dashes when needed (-)
    e. Extension
    f. Roles (Select the access the user will have in the site, you can select more than one field)
        i. View Only *** View Only Role Cannot Be Combined with Payor or Reconciler Roles ***
        ii. Reconcile Bills
        iii. Make Payments
        iv. Give Access to Other Users (admin)
    g. Reset User’s Password (Important! Make sure the user knows their new password)
6. Click the button labeled “Save Changes” to successfully apply the changes

How do I block a user?

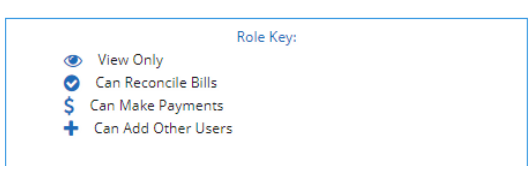
1. Click on the main tab labeled “Manage Users”
2. You will now see all the users on your account
3. Locate the correct user
4. In the section labeled “Actions”, click the button labeled “Block”
5. A box will appear on your screen that states “User Block Updated”
6. To unblock the user, click on the button labeled “Unblock” under “Actions”.

How do I delete a user?

1. Click on the main tab labeled “Manage Users”
2. You will now see all the users on your account
3. Locate the correct user
4. In the section labeled “Actions”, click the button labeled “Delete”
5. A box will appear on your screen that states “Are you sure you want to delete ________? This CANNOT be undone!”
6. Click “Ok” on the pop-up box to delete the employee
7. A box will appear on your screen that states, “User Deleted!”

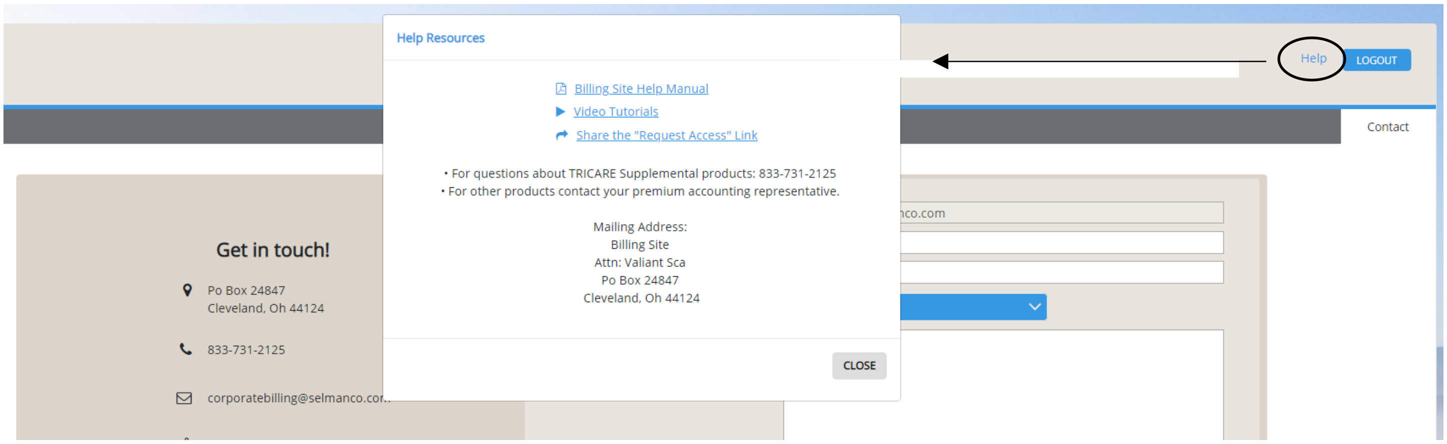
How do I view a user’s current access level?

1. Click on the main tab labeled “Manage Users”
2. You will now see all the users on your account
3. Locate the correct user
4. In the section labeled “Role(s)”, you will see different symbols. Use the “Role Key” to read the symbols.



Need Help? Try the Help Button!

The purpose of the "Help" button is to give the user access to help documentation such as video tutorials and a manual for the site. The user can find contact information here as well.



What are the resources provided on the "Help" button?

A user will have access to the following:

- **Billing Site Help Manual**
  a. This is a comprehensive training manual for all the functions within billing.selmanco.com
- **Video Tutorials on the Following Seven (7) Main Functions**
  1. How to open and view a detailed version of a bill
  2. How to download excel and pdf versions of a bill
  3. How to make changes to a bill (reconcile a bill)
  4. How to submit a bill for payment (paying a bill)
  5. How to view pending payments
  6. How to view paid bills
  7. How to manage your own users
- **Share the "Request Access" Link**
  a. This will allow the user to share the "request access" link to other users. When a user clicks this button, a new email will automatically populate that includes this link for them to share via email.
- **Contact Information:**
  a. For questions about TRICARE Supplemental products: 833-731-2125
  b. For other products contact your premium accounting representative.
  c. Mailing Address:
  Billing Site
  Attn: _________
  Po Box 24847
  Cleveland, Oh 44124