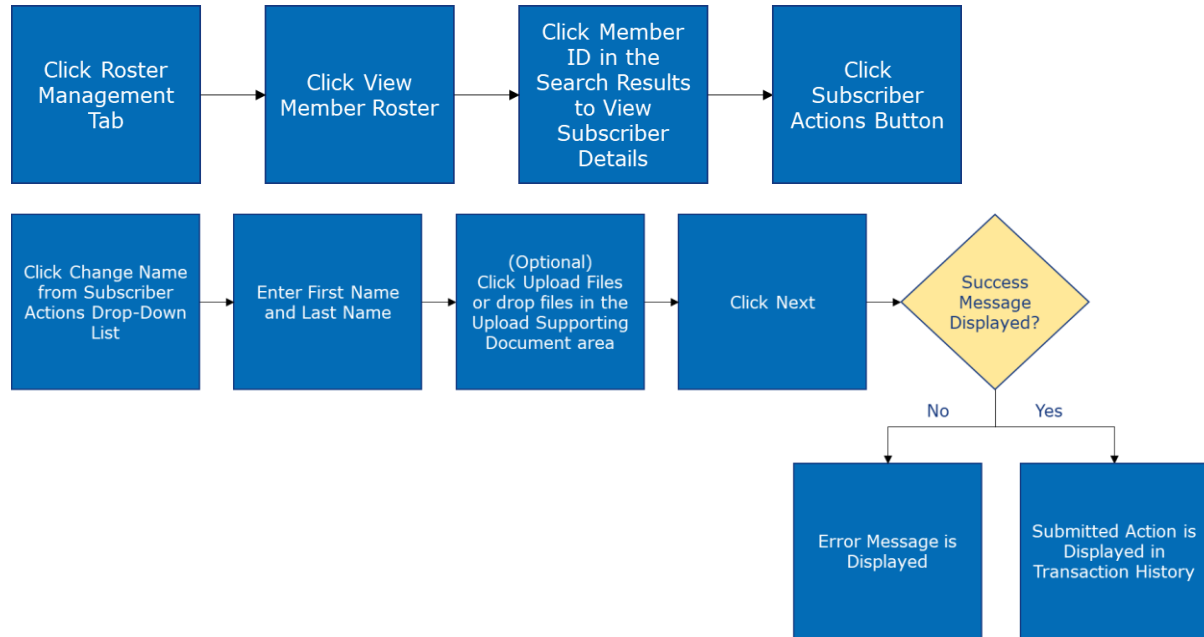


View and Update Member Details

Quick Reference Guide (QRG)



This Quick Reference Guide (QRG) will provide an overview of the process to View and Update Subscriber Details.



Let us look at the steps in detail to View and Update Subscriber Details.

Purpose: View and Update Subscriber Name and Address.

Step 1:

1. From the **ConnectiCare Home** page, select the **Roster Management** tab.
2. From the drop-down menu, select **View Member Roster**.



Step 2:

The Member Roster screen displays.

1. In the **Search By** field, select desired option (**None**, **Subgroup ID**, or **Subgroup Name**).
2. If **Subgroup Name** or **Subgroup ID** are selected, then enter Subgroup Name or Subgroup ID in the **Search** field.

Home > Member Roster

- CCI LG TEST GROUP

Member Roster

Search By
☒ None ☐ Subgroup ID ☐ Subgroup Name

Member Status
All

☐ Subscriber Only ☐ Future Effective

Search

Reset Search

Exporting search results will show more details for each member.

Export Member Roster

Subgroup ID	Class ID	Member ID	Member Name	Date of Birth	SSN	Gender	Relationship to Subscriber	Coverage Start Date	Termination Date	Original Effective Date	Status
1001	1001	K5500160802	BEDFORD, JOE	01/04/1999	XXX-XX-8675	Male	Child	01/01/2020	-	01/01/2020	Active



Step 3:

1. Click **Search**.

Note: Check the **Subscriber Only** checkbox to search for Subscribers only (excluding Dependents). Check the **Future Effective** checkbox to search only for members whose coverage is Future Effective. The **Member Status** drop-down menu defaults to **All**. You can select **Active** or **Inactive**.

Search By
☒ None ☐ Subgroup ID ☐ Subgroup Name

Member Status
All

☐ Subscriber Only ☐ Future Effective

Search

Reset Search

Exporting search results will show more details for each member.

Export Member Roster

Subgroup ID	Class ID	Member ID	Member Name	Date of Birth	SSN	Gender	Relationship to Subscriber	Coverage Start Date	Termination Date	Original Effective Date	Status
1001	1001	K5500160802	BEDFORD, JOE	01/04/1999	XXX-XX-8675	Male	Child	01/01/2020	-	01/01/2020	Active
1001	1001	K5500160801	BEDFORD, SARAH	01/01/1976	XXX-XX-8786	Female	Subscriber	01/01/2020	-	01/01/2020	Active
1001	1001	K5500162001	COOK, ANDREW	08/06/1967	XXX-XX-0099	Male	Subscriber	01/01/2020	-	01/01/2020	Active
1001	1001	K5500162002	COOK, BETH	09/08/1967	XXX-XX-7876	Female	Spouse	01/01/2020	-	01/01/2020	Active
1001	1001	K5500161901	FRANCO, MATHEW	09/01/1967	XXX-XX-6545	Male	Subscriber	01/01/2020	-	01/01/2020	Active



Step 4:

The results display.

1. Click **Member ID** to view member details.

Note: Records can be sorted by desired field; by default, they are sorted by **Member Name**.

Search By
☒ None
☐ Subgroup ID
☐ Subgroup Name

Member Status
All

☐ Subscriber Only
☐ Future Effective

Search
Reset Search

Exporting search results will show more details for each member.
Export Member Roster

Subgroup ID	Class ID	Member ID	Member Name	Date of Birth	SSN	Gender	Relationship to Subscriber	Coverage Start Date	Termination Date	Original Effective Date	Status
1001	1001	K5500160802	BEDFORD, JOE	01/04/1999	XXX-XX-8675	Male	Child	01/01/2020	-	01/01/2020	Active
1001	1001	K5500160801	BEDFORD, SARAH	01/01/1976	XXX-XX-8786	Female	Subscriber	01/01/2020	-	01/01/2020	Active
1001	1001	K5500162001	COOK, ANDREW	08/06/1967	XXX-XX-0099	Male	Subscriber	01/01/2020	-	01/01/2020	Active
1001	1001	K5500162002	COOK, BETH	09/08/1967	XXX-XX-7876	Female	Spouse	01/01/2020	-	01/01/2020	Active
1001	1001	K5500161901	FRANCO, MATHEW	09/01/1967	XXX-XX-6545	Male	Subscriber	01/01/2020	-	01/01/2020	Active



Step 5:

The Subscriber Details screen displays.

1. Click **Subscriber Actions**.

Note: For a dependent, these steps are the same. The Subscriber Actions drop-down menu will be called Dependent Actions. Available actions may vary according to the group type and/or the plan type (e.g., Medicare).

2. Click **Change Name** from the drop-down menu to change Subscriber name.

Subscriber Details

Status

Active

Address

11 FIRST STREET, New York, NY, 10011

Marital Status

Married

Termination Date

-

Email

-

SSN

XXX-XX-8786

Member Name

SARAH BEDFORD MRS

Mobile Phone Number

-

Gender

Female

Member ID

K5500160801

DOB

01/01/1976

Referral P

No

Subscriber Actions

Add Dependent
Change Name
Change Marital Status
Change Subscriber Address
Change Date of Birth
Change PCP
Change Plan
Terminate Subscriber
Terminate Coverage
Change Language / Ethnicity / Race



Step 6:

The Change Name screen displays.

1. Enter **First name** and **Last Name**.

Note: Fields marked with an asterisk are mandatory.

2. Click **Upload Files** or drop files in the **Upload Supporting Document** area to upload the supporting document files.

Change Name

First Name *
SARAH

Middle Name

Last Name *
BEDFORD

You will need to upload a copy of at least one of the documents below as part of this transaction.

- Birth Certificate
- Driver's License/State ID
- Marriage Certificate
- U.S. Passport (identification page)

Upload Supporting Document

Upload Files
 Or drop files

You can upload files that are .doc, .docx, .xls, .xlsx, .ppt, .ppbx, .zip, .zipx, .pdf, .gif, .jpg, .jpeg and .png. Files must be less than 3 MB in size.



Step 7:

1. Click **Next**.

- Birth Certificate
- Driver's License/State ID
- Marriage Certificate
- U.S. Passport (identification page)

Upload Supporting Document

Upload Files
 Or drop files

You can upload files that are .doc, .docx, .xls, .xlsx, .ppt, .ppbx, .zip, .zipx, .pdf, .gif, .jpg, .jpeg and .png. Files must be less than 3 MB in size.

*Required information

Next



Step 8:

The Confirmation Screen displays.

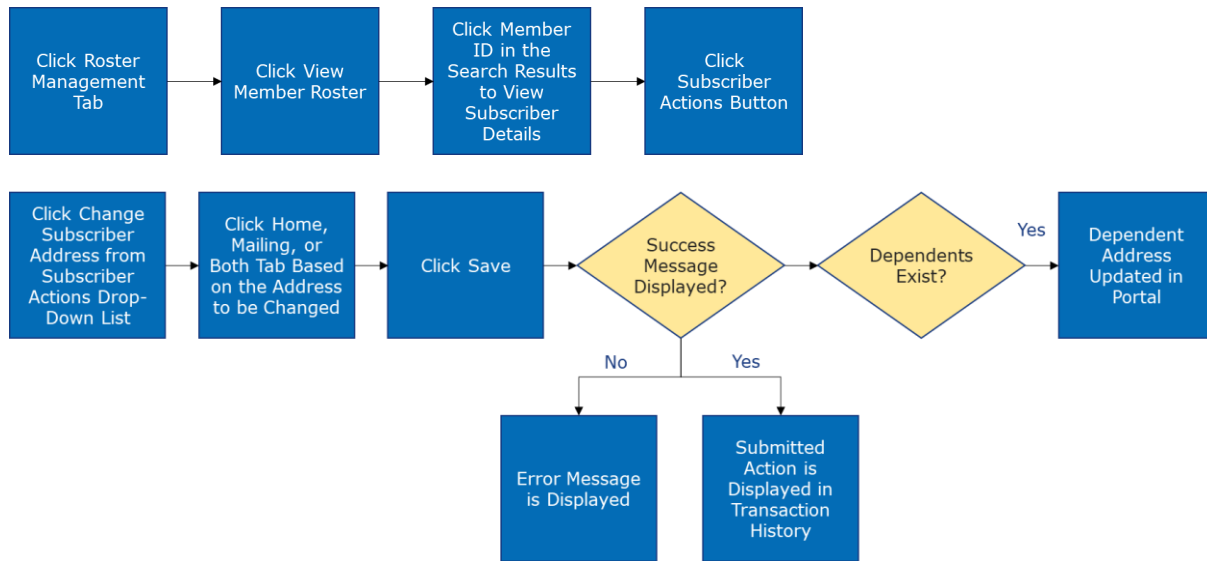
1. Click **OK**.

[Home](#) > [Change Name](#)

Confirmation

Thank you for your submission. Your case number is 07528663. You can check the status of your request in the [Transaction History](#). It may take up to three (3) business days for your request to be reflected online.

OK



Step 1:

This is the Change Subscriber Address process.

1. Click **Subscriber Actions**.
2. Click **Change Subscriber Address** from the drop-down menu to change the address.

Subscriber Details

Status Active	Termination Date -	Member Name SARAH BEDFORD MRS	Member ID K550016
Address 11 FIRST STREET, New York, NY, 10011	Email -	Mobile Phone Number -	DOB 01/01/19
Marital Status Married	SSN XXX-XX-8786	Gender Female	Referral P No

▼ Subscriber Actions

- Add Dependent
- Change Name
- Change Marital Status
- Change Subscriber Address
- Change Date of Birth
- Change PCP
- Change Plan
- Terminate Subscriber
- Terminate Coverage
- Change Language / Ethnicity / Race



Step 2:

The Change Subscriber Address screen displays.

Change Subscriber Address

Note: If the subscriber and dependent(s) share the same address, any updates submitted below will apply to both subscriber and dependent(s). If the subscriber and dependent(s) do not have the same address, updates submitted below will only apply to the subscriber.

Are you updating the subscriber's...?

Home	Mailing	Both
------	---------	------

*Required information

Save

Cancel



Step 3:

1. Click **Home** to update home address.
2. Enter the required information.
3. Click **Save**

Home Address

Street Address

11 FIRST STREET

Zip Code *

10011

City*

New York

State*

NY

*Required information

Save



Step 4:

1. Click **Mailing** to update mailing address.
2. Enter the required information.
3. Click **Save**.

Mailing Address

Street Address

11 FIRST STREET

Zip Code *

10011

City *

New York

State *

NY

* Required information

Save



Step 5:

1. Click **Both** to update home and mailing address at once.
2. If your home and mailing addresses are the same, select the **Is Mailing Address same as Home Address?** box.
3. Enter the required information.

Home

Mailing

Both

Home Address

Street Address

11 FIRST STREET

Zip Code *

10011

City *

New York

State *

NY

☐ Is Mailing Address same as Home Address ?



Step 6:

1. If home and mailing address are not the same, enter the required information for both.
2. Click **Save**.

Mailing Address

Street Address

11 FIRST STREET

Zip Code *

10011

City *

New York

State *

NY

*Required information

Save



Step 7:

The Confirmation screen displays.

Home > Change subscriber address

Confirmation

Thank you for your submission. Your case number is 07528664. You can check the status of your request in the Transaction History. It may take up to 24 hours for your request to be reflected online.

Thank You