



# United Concordia Dental Connection Guide

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## BEFORE YOU BEGIN

### Supported Products

The following products are supported by the connection:

- Dental (with or without Vision rider)

### Plan Tips

- Vision rider is an embedded benefit in the dental plan.
  - This should not be built as a separate plan.
  - This does not need to be called out in the dental plan build.

### Required Information

In addition to the fields natively required by Ease, (i.e..employee demographics, basic plan information, etc.,) the following information will need to be provided for a “complete” submission to United Concordia Dental:

- Carrier Name equals United Concordia Dental (otherwise plans will not show in wizard)
- Scheduled Hours
- Policy Number\*\*
- Subgroup Number\*\*

\*\* Policy # and Subgroup # will be provided by UCD via an account structure. See Data Mapping section for additional detail.

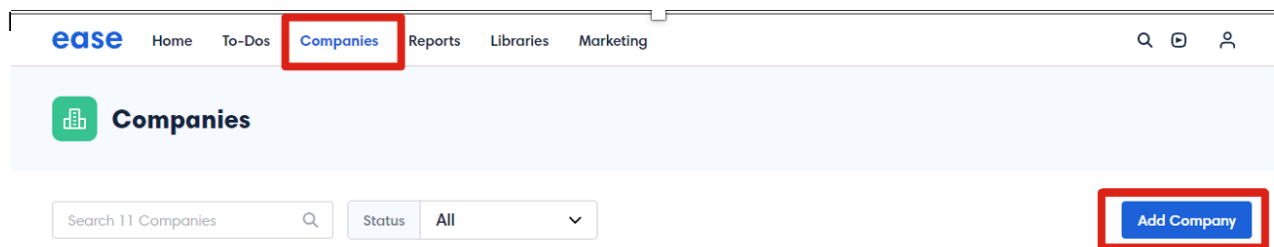
### Adds, Changes & Terminations

All adds, changes, and terminations will be sent directly to the carrier for processing once the group is in an “Approved” status.

## Company Creation & Plan Setup

### Company Creation

Before making a connection to United Concordia Dental, the company and plans should be added to the Ease platform.



Upon clicking “Add Company,” a modal will open, prompting the broker to enter the basic information about the company. NOTE: An asterisk (\*) indicates a required field. Once all information is entered, click Continue.

The screenshot shows the 'Add Company' modal in the EASE system. The modal is open over a 'Companies' list. The modal fields are: Name (required), City (required), State (required), Zip (required), Agent (required), and Teams. The 'Continue' button is highlighted with a red box.

**NOTE:** The Company Name field should be populated with the legal name of the group.

## Plan Setup

The plan setup is identical to all plan builds in Ease.

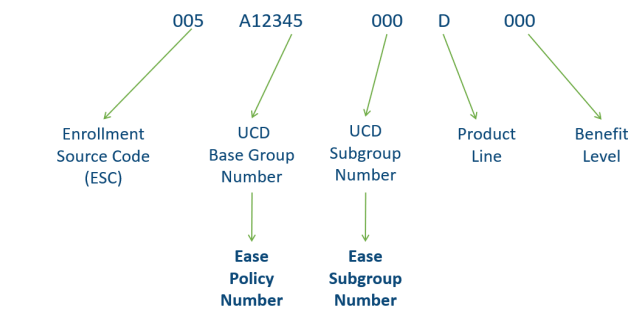
\*For more details on plan setup, please view our [helpdesk article \(click here\)](#).

## Data Mapping

The following data elements are **required** by United Concordia Dental in each individual plan in order to accurately process the file and elections.

United Concordia Dental Field	Ease Field	Location
Base Group # (6 Alpha-numeric characters)	Policy Number	Eligibility tab of the plan
Subgroup # (3 Numeric characters)	Subgroup Number	Eligibility tab of the plan

**005A12345000D000**



## SETTING UP THE CONNECTION

### File Information

Transmission Frequency: Weekly on Tuesday

Records Include: Full file (adds, terms, changes)

**NOTE:** Ease provides a standard set of enrollment and demographic data to all connected carriers. Based on their own system requirements, each carrier individually determines which fields they will read and/or translate.

### Enable Carrier Connection

Step one, ensure that the carrier is enabled for your agency. Step two, navigate to the employer that needs the connection enabled and select the carrier via the marketplace tile.

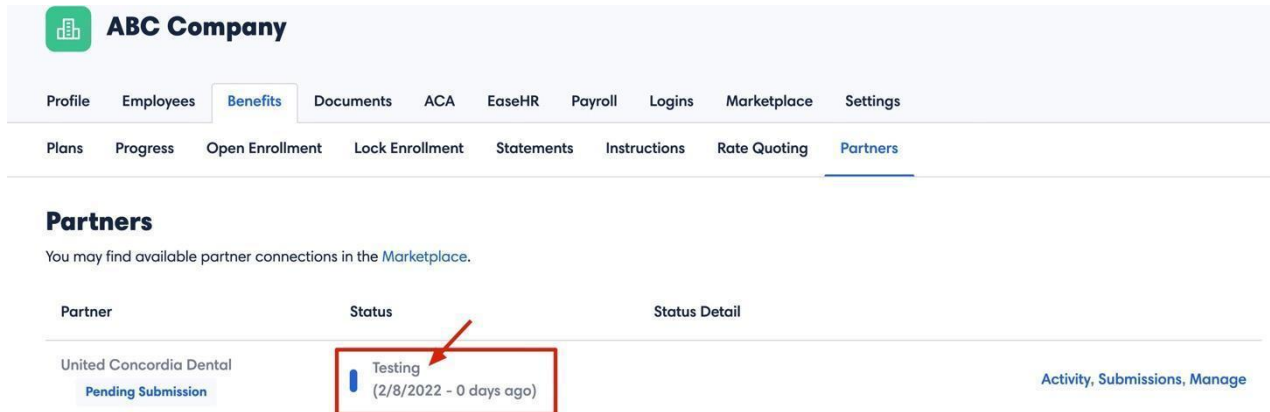
The screenshot displays the Ease HR system interface. At the top, the navigation bar includes the 'ease' logo and links for Home, To-Dos, Companies (active), Reports, Libraries, and Marketing. On the right, there are icons for search, a checklist, a calendar, and a user profile. Below the navigation bar, the 'ABC Company' header is visible, followed by a sub-navigation menu with links for Profile, Employees, Benefits, Documents, ACA, EaseHR, Payroll, Logins, Marketplace (highlighted with a red box), and Settings. The main content area features a 'Marketplace' banner with a storefront icon and the text 'ABC Company Marketplace' and 'Discover products to save time, simplify HR, and increase employee engagement'. Below the banner, the 'EaseConnect' section is highlighted with a red box, with the text 'Connect directly to carriers for easier enrollment and plan submission.' and a 'View All Categories' button. A grid of six carrier tiles is shown below: HealthPartners, ManhattanLife, Oscar, Transamerica, Trustmark, and United Concordia Dental. Each tile contains the carrier's logo and name.

**EaseConnect**  
Connect directly to carriers for easier enrollment and plan submission.

**View All Categories**

 HealthPartners	 ManhattanLife Standing By You. Since 1850.	 Oscar
 Transamerica	 Trustmark benefits beyond benefits	 United Concordia Dental

Once the connection is enabled, the Partner Status will show as “Testing.”

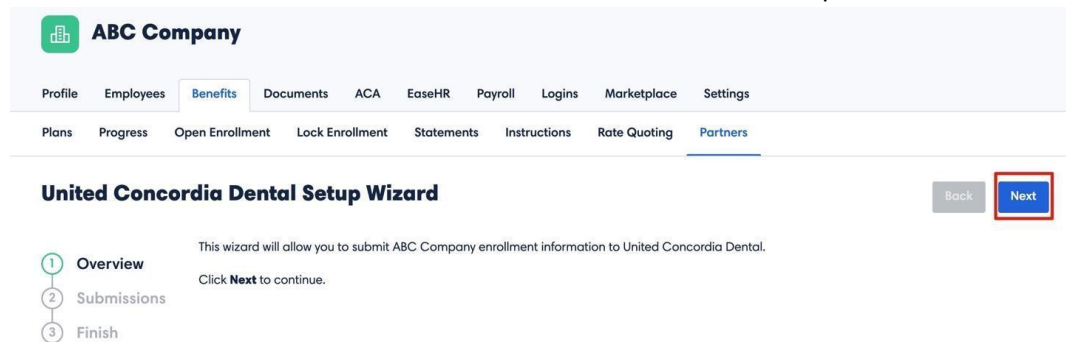


The screenshot shows the ABC Company interface with the 'Partners' tab selected. A table lists partner connections. The first entry is 'United Concordia Dental' with a status of 'Testing' (2/8/2022 - 0 days ago). A red box highlights the 'Testing' status, and a red arrow points to it. The table has columns for 'Partner', 'Status', and 'Status Detail'. Below the table are links for 'Activity, Submissions, Manage'.

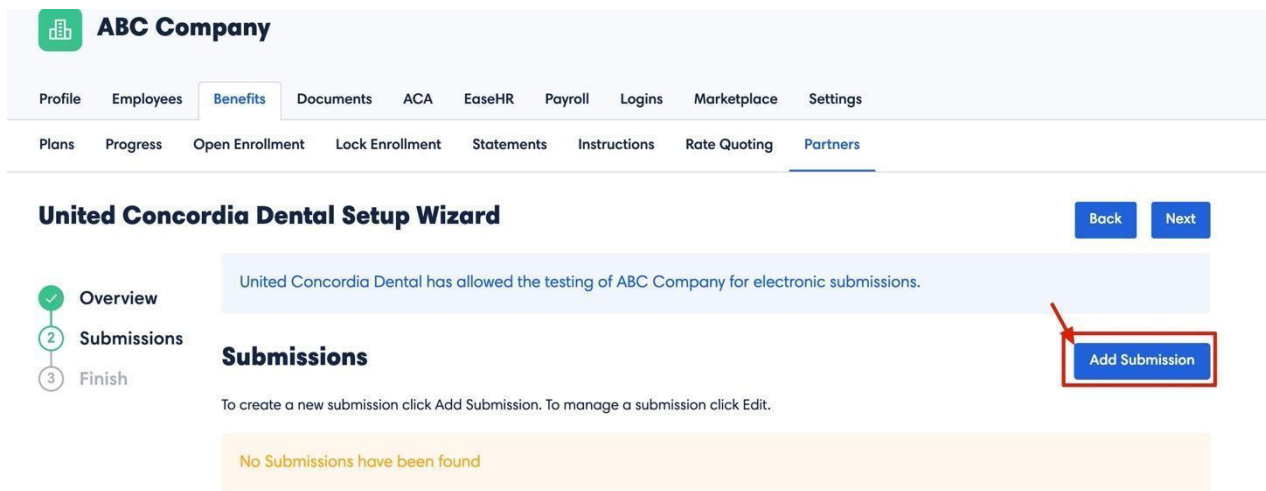
Partner	Status	Status Detail
United Concordia Dental <a href="#">Pending Submission</a>	Testing (2/8/2022 - 0 days ago)	<a href="#">Activity, Submissions, Manage</a>

## Add Submission

Once the connection is enabled, the broker will be directed to the setup wizard.



The screenshot shows the 'United Concordia Dental Setup Wizard' with the 'Overview' step selected. The wizard instructions state: 'This wizard will allow you to submit ABC Company enrollment information to United Concordia Dental. Click **Next** to continue.' A red box highlights the 'Next' button. The progress bar shows 1 of 3 steps completed.



The screenshot shows the 'United Concordia Dental Setup Wizard' with the 'Submissions' step selected. The wizard instructions state: 'United Concordia Dental has allowed the testing of ABC Company for electronic submissions.' A red box highlights the 'Add Submission' button. The progress bar shows 2 of 3 steps completed. Below the instructions, a message states: 'No Submissions have been found'.

## United Concordia Dental Setup Wizard

✓ Overview

2 Submissions

3 Finish

### Submission

Status Not Submitted

View All Submissions

Delete Submission

Submit to Carrier

### Choose Plans to Submit

<input type="checkbox"/>	Plan Name	Carrier Partner	Plan Type	Effective
<input type="checkbox"/>	2022 UCD Dental	United Concordia Dental	Dental	3/1/2022

The initial submission, whether it's a new case or existing business, will be reviewed by the carrier for accuracy. **NOTE:** Should Carrier need to contact you during this process, they will utilize a secure email server, ZixMail. Subject of the emails: [Secure] Ease Platform - AGENCY NAME / CUSTOMER NAME

### Testing

During this review stage the connection status is "Testing." This means that the carrier is still reviewing the data for accuracy, participation, etc. The broker can find the status of the connection under **Group>Benefits>Partners>Status**. Data discrepancies during testing may need to be corrected in Ease and may vary in severity. The testing process will continue until the electronic enrollment file successfully passes testing.

**NOTE:** The broker contact will be utilized for any questions regarding the group structure mapping, plan setup, and discrepancy corrections. A secure email server, ZixMail, will be used for all communications from carrier. Subject of the email: [Secure] Ease Platform - AGENCY NAME / CUSTOMER NAME

ABC Company

Profile

Employees

Benefits

Documents

ACA

EaseHR

Payroll

Logins

Marketplace

Settings

Plans

Progress

Open Enrollment

Lock Enrollment

Statements

Instructions

Rate Quoting

Partners

Status Available

Type All

Reports

Connection

Actions

<input type="checkbox"/>	Name	Type	Carrier	Connection Status	Effective	Import Id
<input type="checkbox"/>	2022 UCD Dental	Dental	United Concordia Dental	Carrier Review	3/1/2022	327CYK

### Approved

Once the carrier has verified the information and setup to be accurate, the group will be moved from "Testing" status to "Approved" status, upon which all adds, changes, and terminations will be sent directly to the carrier for processing. The broker can find the status of the connection under **Group>Benefits>Partners>Status**. Upon being approved, the plan status will show "Connected."

### Ongoing Enrollment (Adds, Changes, Terminations)

Once the connection is live, adds, changes, and terminations will feed over on a weekly eligibility file. Employee and dependent data should be kept up-to-date in Ease to minimize file errors.

## Ongoing Error Maintenance

Broker users will be provided discrepancy reports for each group via a secure delivery method once the file has been processed. Any discrepancies identified should be corrected by the broker prior to the following week's file.

Data discrepancies may need to be corrected in Ease, and will vary in severity. It is the responsibility of the broker to review the group's error reports and correct all data discrepancies.

**NOTE:** Once the connection is approved, United Concordia Dental will no longer allow enrollment updates to be made using the UCD Group Administration Portal. All updates should be made directly in Ease.



## Scenarios to look out for

Scenario	Notes
Broker of Record (BOR) Changes	<ul style="list-style-type: none"><li>• United Concordia Dental should receive a new connection request from the <b>new BOR</b></li><li>• The previous BOR should disable the UCD feed to avoid multiple records being transmitted, as well as other erroneous data such as unnecessary EE terminations.</li></ul>
Group Termination/Carrier Change	<ul style="list-style-type: none"><li>• The broker should add the termination date to the enrollment on Ease so that it will transmit on the file.</li><li>• After the final file is processed, the broker should disable the UCD feed.</li></ul>
Employee Termination	<ul style="list-style-type: none"><li>• The termination date should not be entered on Ease more than 30 days prior to the termination.</li></ul>
Employer Group no longer wants to utilize Ease	<ul style="list-style-type: none"><li>• The broker should move the entire company to an Inactive status. This will automatically disable all connections.</li><li>• The broker should then notify UCD of the new enrollment method.</li></ul>

## CONTACTS

### Ease

Phone: (702) 800-2690

Ticket: <https://help.ease.com>

Live Support: [Schedule Live Assistance](#)

**\*\*If the broker is not able to find status updates in Ease, they should reach out to their UCD Account Manager**

**NOTE:** Should Carrier need to contact you during this process, they will utilize a secure email server, ZixMail. Subject of the emails: [Secure] Ease Platform - AGENCY NAME /CUSTOMER NAME