health shield
The best of health

Customer Portal guides

Walkthrough Guide to the New Customer Portal



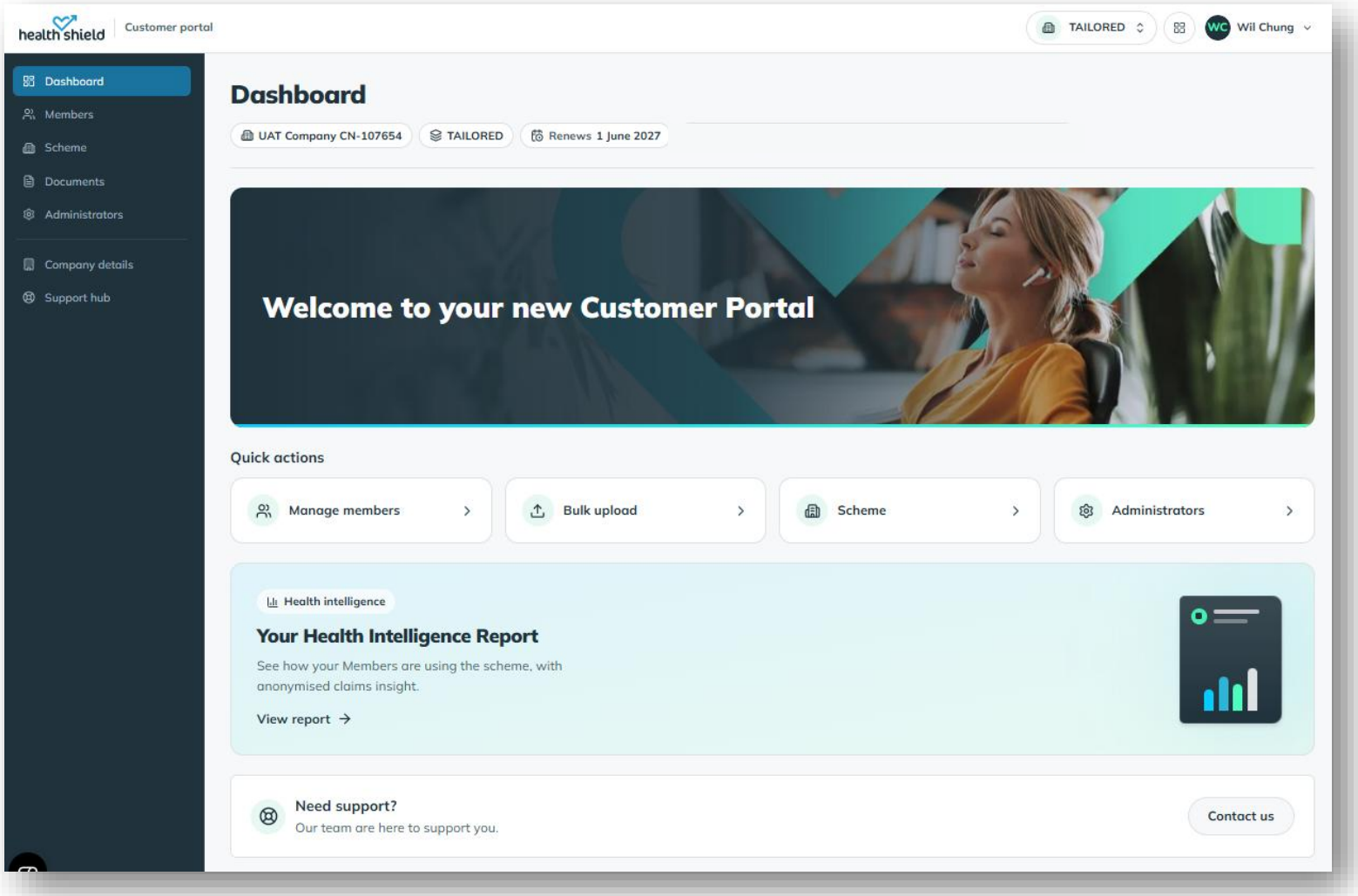
Welcome to the Health Shield Customer Portal

Welcome to the Health Shield Customer Portal – your one place to manage everything for your employees.

This is a quick “walk through” guide for all the main features.

There are additional “how to” guides giving you step-by-step instructions for the main functions. Be sure to check [Customer Resources]

Visuals and features may vary based on your scheme and platform updates.

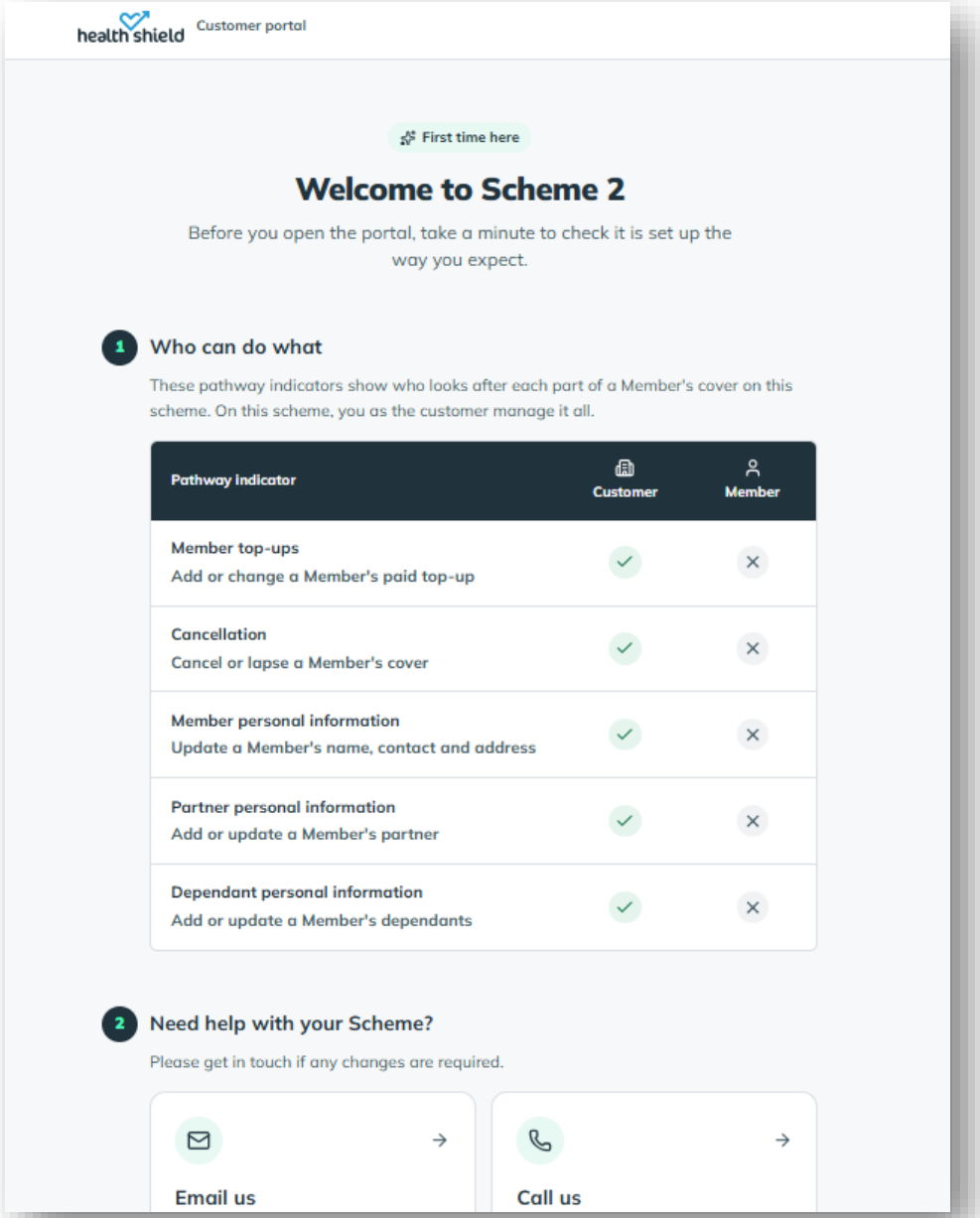


Introducing your dashboard

If you're logging in for the first time, we will ask you to check your scheme configuration – essentially confirming what, within their plan, your employees can change themselves.

If the configuration needs amending, speak to your Sales Support team who will make the necessary changes.

Visuals and features may vary based on your scheme and platform updates.

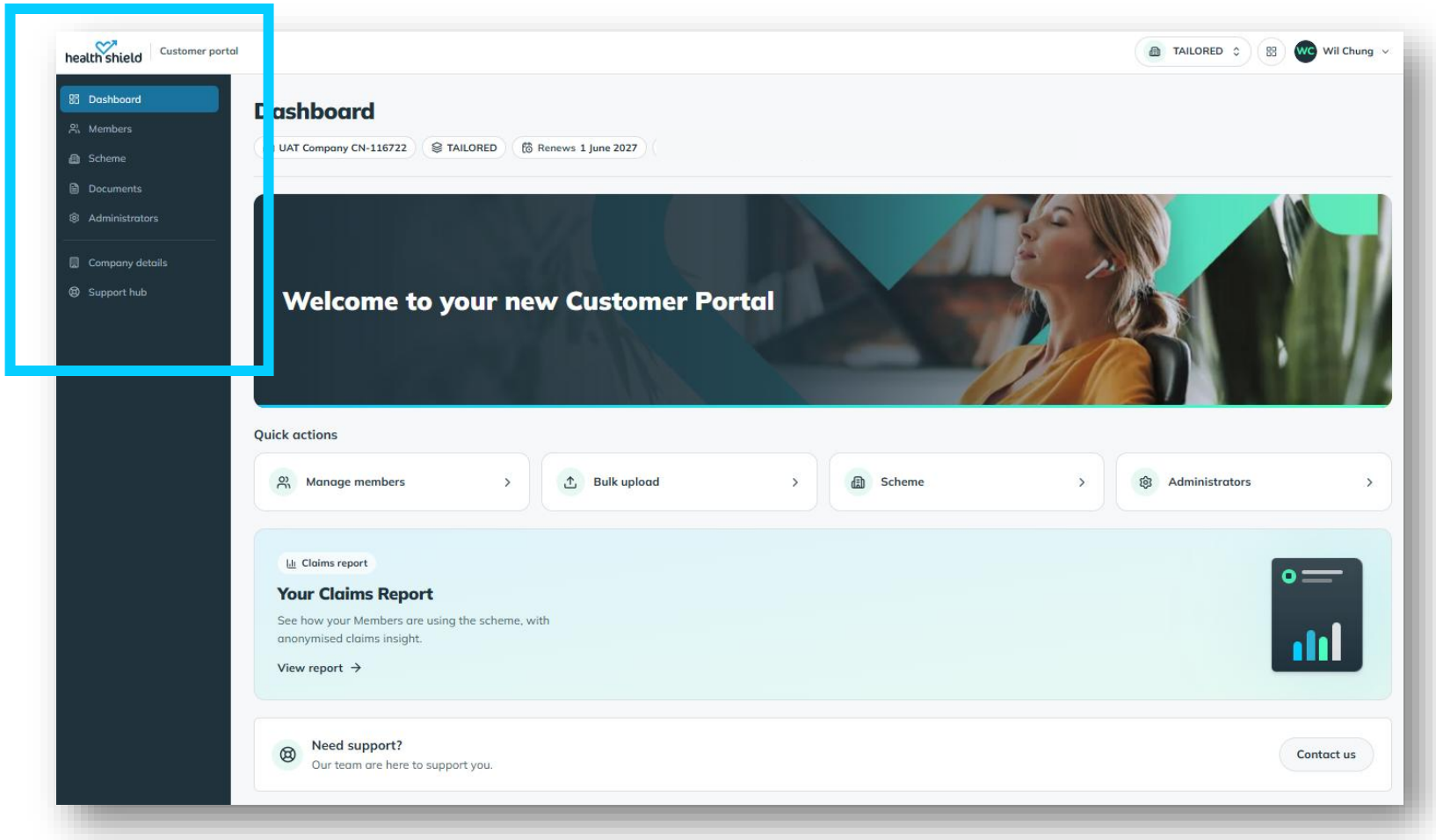


Introducing your dashboard

When you log in, you land on your dashboard.

From here, you can jump straight to your key sections:

- Members
- Schemes
- Documents
- Administrators
- Company Details
- and the Support Hub



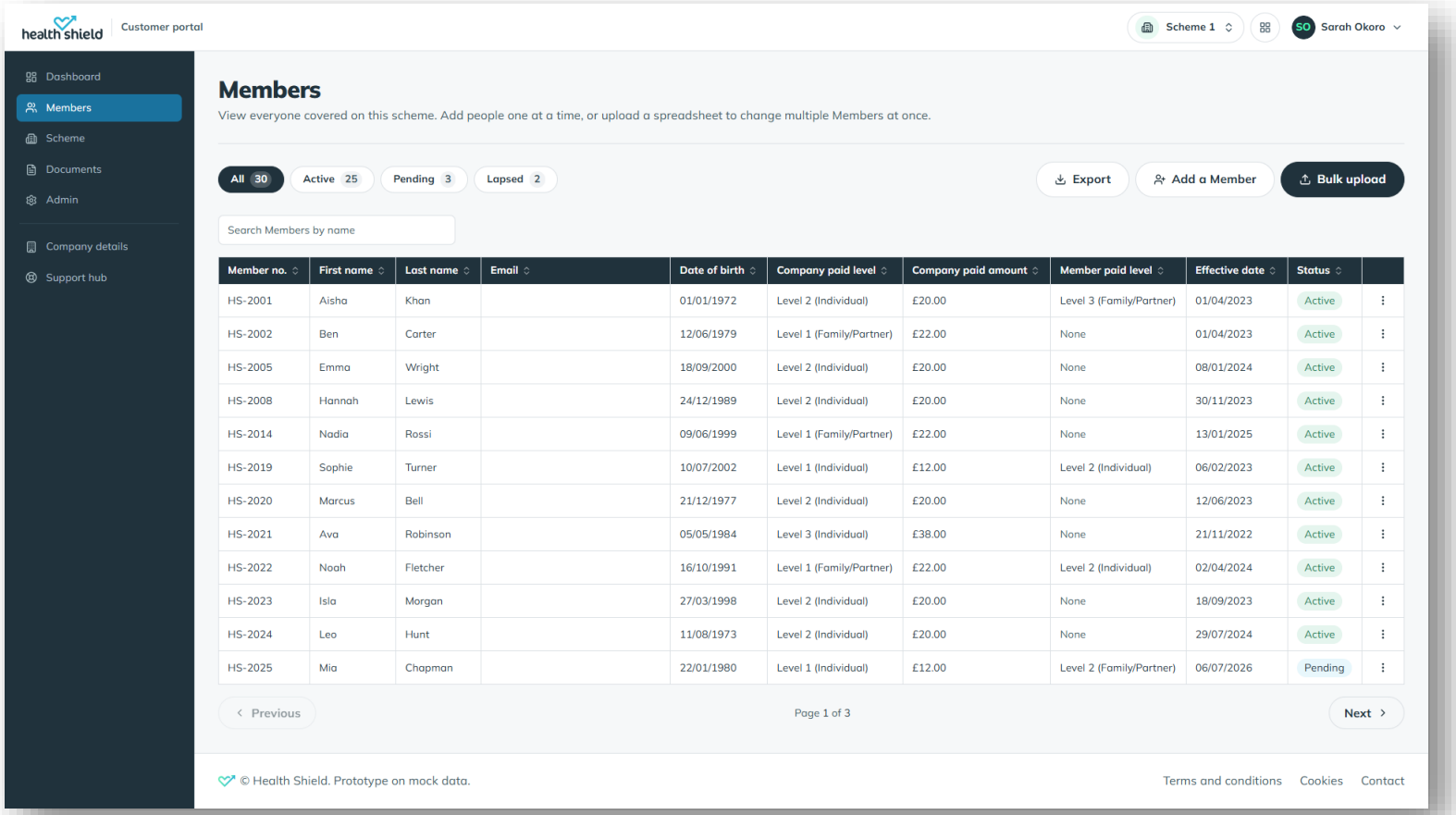
Visuals and features may vary based on your scheme and platform updates.

Members

The Members section is where you manage employee details.

You can:

- View Member lists
- Edit records
- View and change levels
- Add a new Member
- Bulk upload several Members at once
- Export records



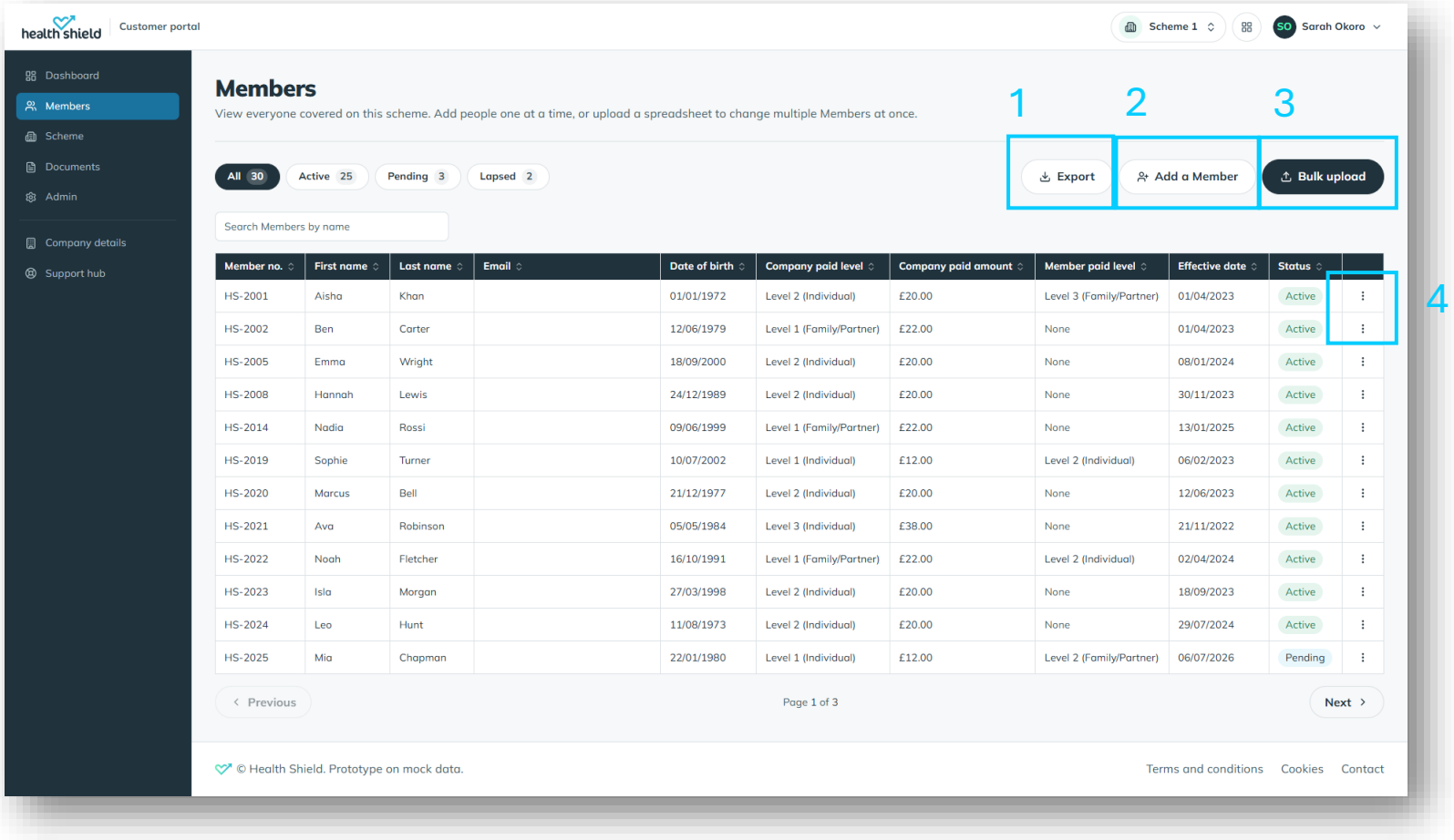
Visuals and features may vary based on your scheme and platform updates.

Members

The Members section is where you manage employee details.

1. Export employee data
2. Add a new Member
3. Bulk upload several Members at once
4. Edit a Member record

See our separate “How to amend Members” guides for full instructions

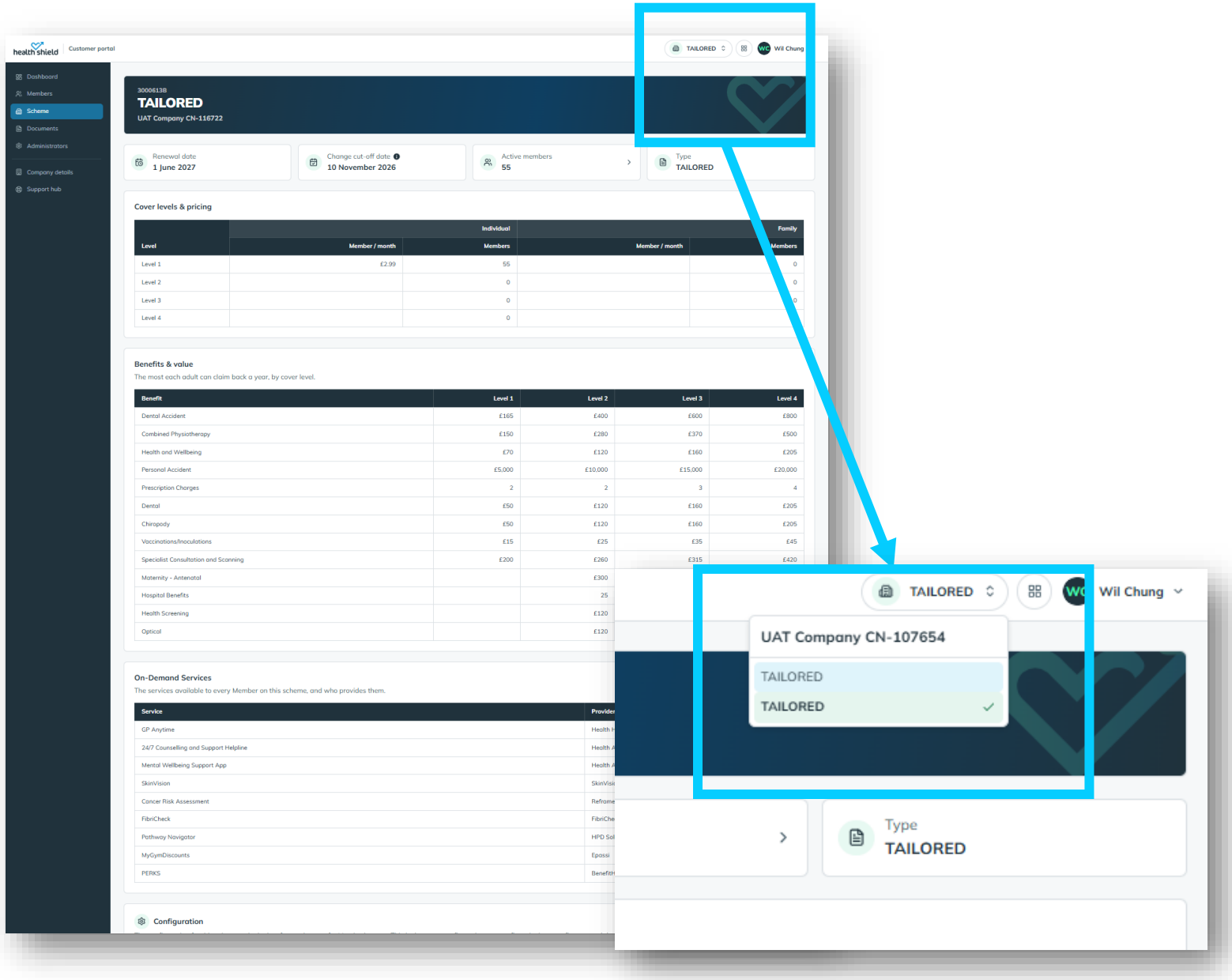


Visuals and features may vary based on your scheme and platform updates.

Schemes

The Schemes section gives you a clear view of each plan.

- You'll see the scheme summary
- The payroll cut off date (the deadline to make changes effective in the current period)
- Who sits at each level
- How the plan is configured
- If the organisation has more than one sub-group or scheme, it’s easy to toggle between them by clicking the scheme icon in the top right corner.

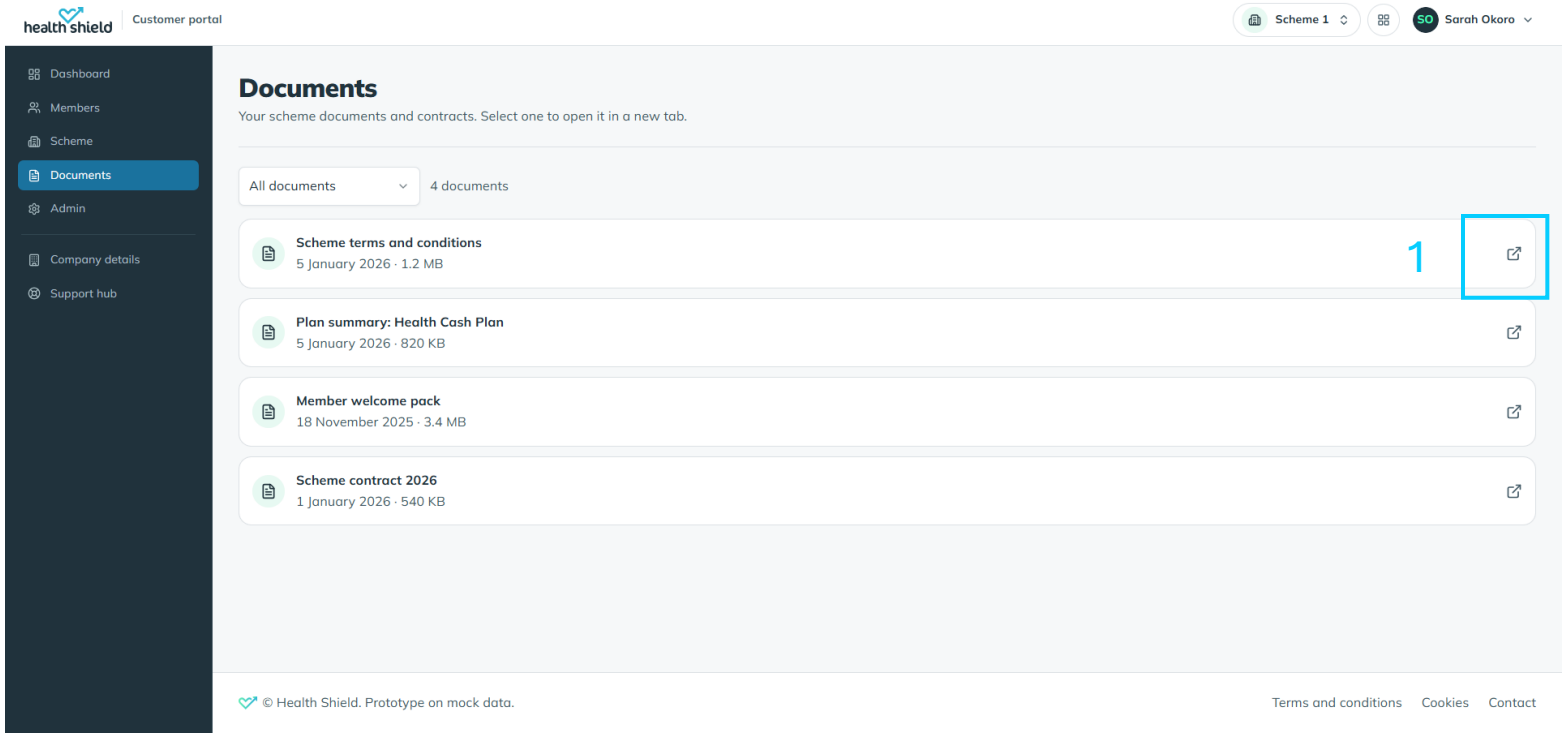


Visuals and features may vary based on your scheme and platform updates.

Documents

The documents section holds all important documents related to your scheme.

1. View or download your documents

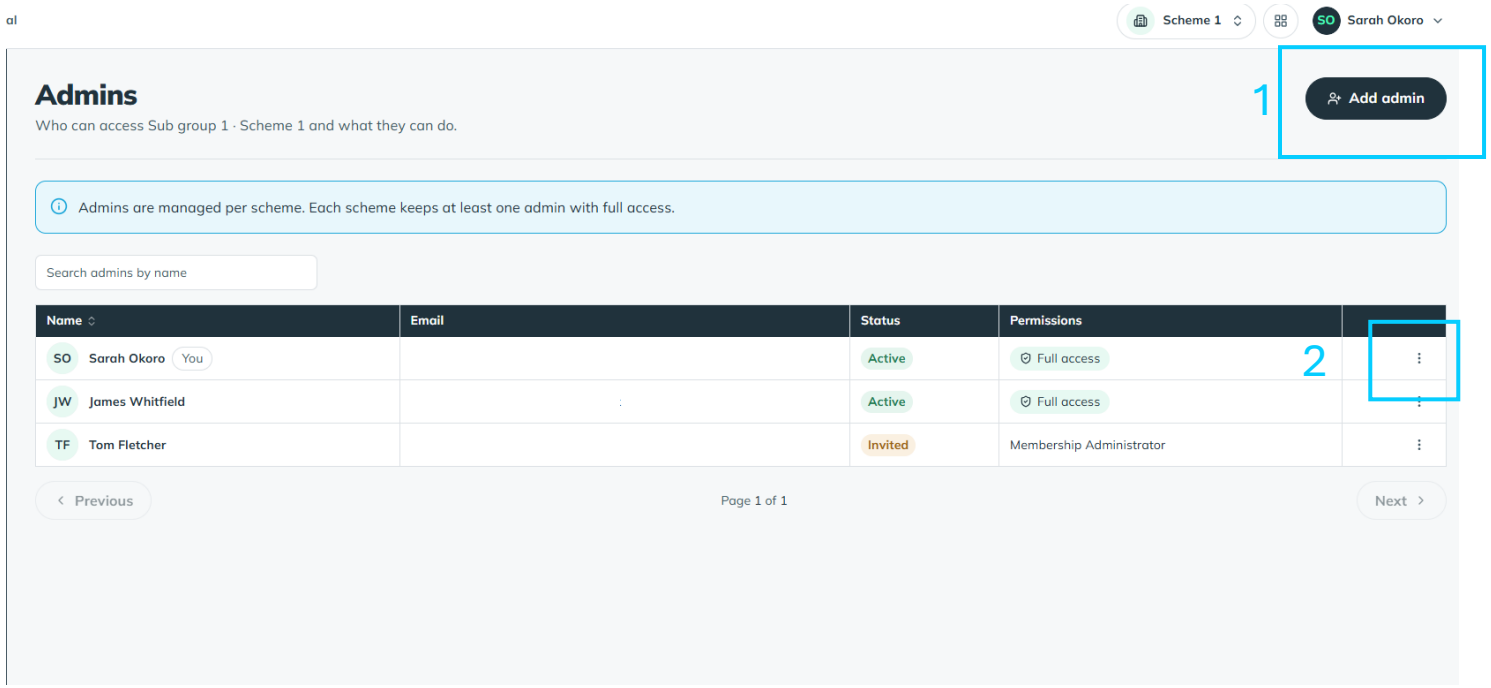


Visuals and features may vary based on your scheme and platform updates.

Administrators

The administrator section allows you to control access to who manages your scheme.

1. Add new administrators
2. Review and edit administrators and their permissions

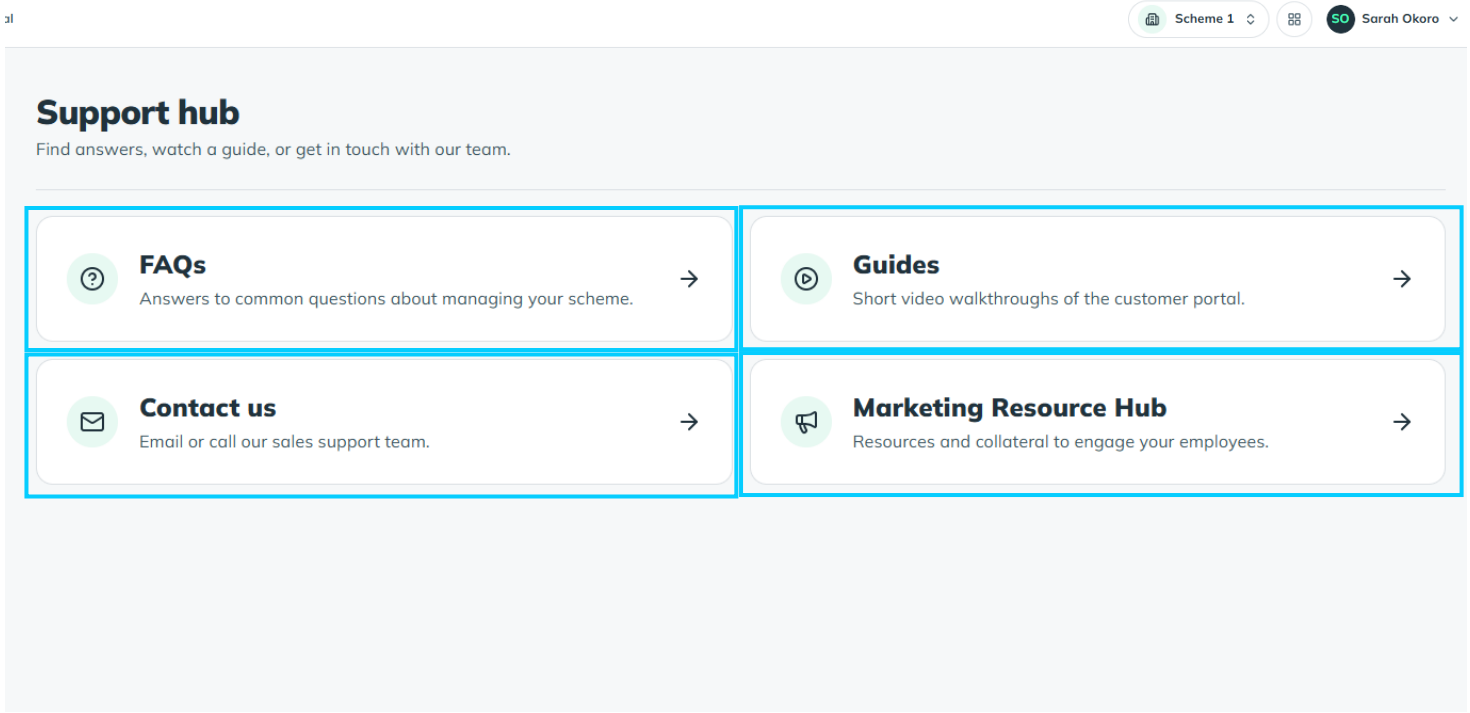


Visuals and features may vary based on your scheme and platform updates.

Support Hub

The Support Hub.

1. FAQs related to portal usage and managing your scheme
2. Contact details for our support team
3. Video “how-to” guides,
4. Marketing Resources to help you engage your people with their Health Plan



Visuals and features may vary based on your scheme and platform updates.

health shield

The best of health



Need support?

Call: 01270 588 555

Email: salessupport1@healthshield.co.uk