

GenPortal

User Handbook



GenPortal



Managing employee benefits made easy.

All transactions are digital-based. No more paperworks.

Available in www.generali.com.ph.

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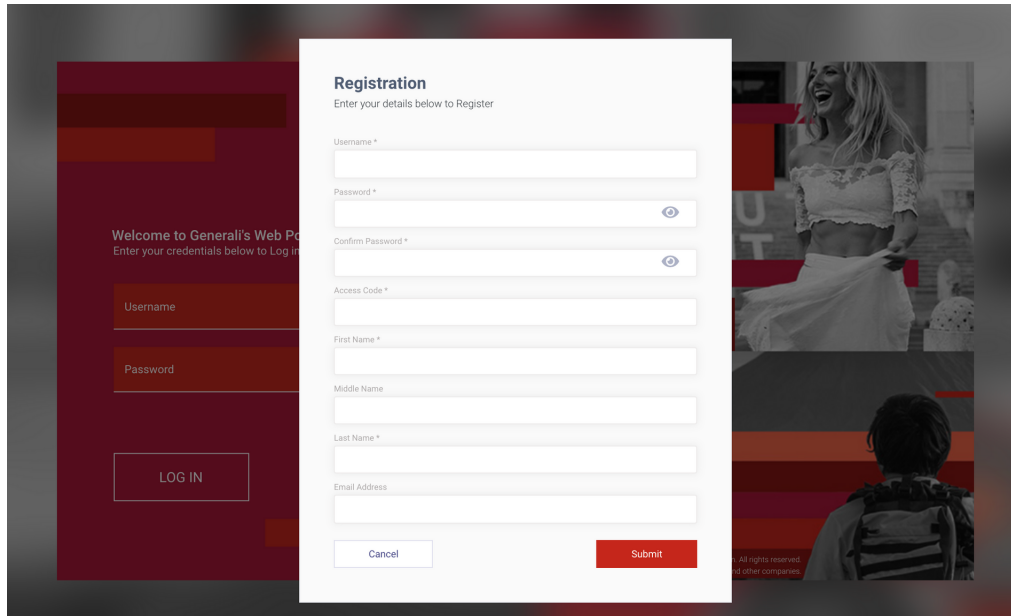
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01 How to Register your Account

From the Landing Page, **click the "Register" button.**

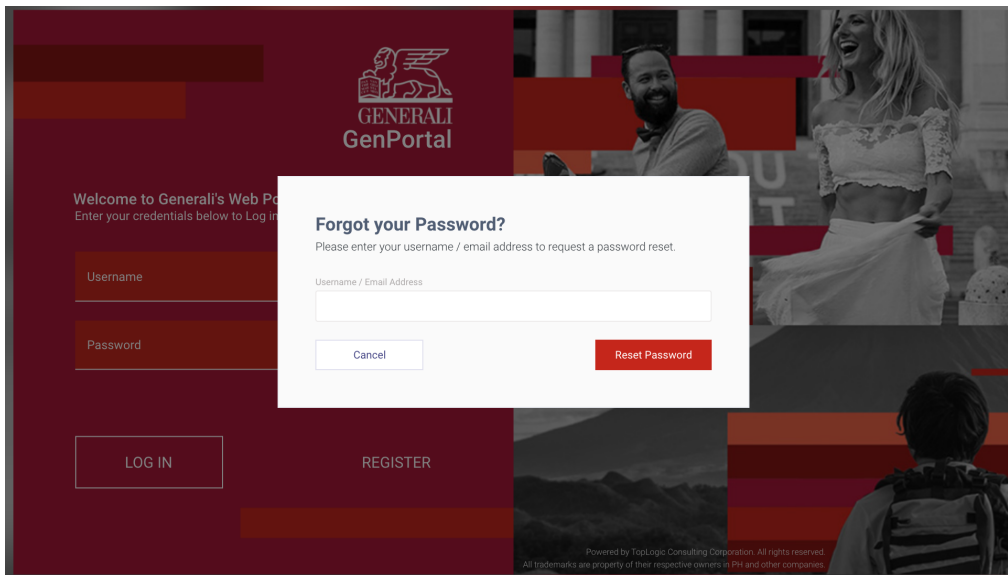


The image shows a registration form overlaying a login page. The registration form is titled "Registration" and includes the following fields: Username *, Password *, Confirm Password *, Access Code *, First Name *, Middle Name, Last Name *, and Email Address. There are "Cancel" and "Submit" buttons at the bottom of the form. The background shows a login page with a "LOG IN" button and a "Welcome to Generali's Web Portal" message.

- All fields are required
- Access code must be valid generated from GenPortal Registered Users (MAS)
- If Email Address is already used on the Registered Users, registration using the existing Email Address is not allowed
- If the user successfully registered the user, the system will send an ACTIVATION CODE to the provided Email Address upon registration.

02 How to Reset Password

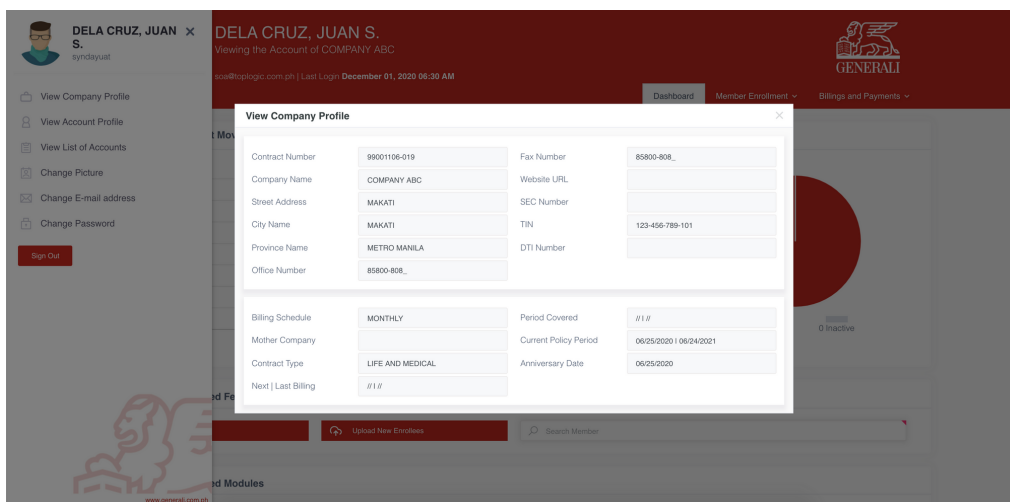
To reset password, **click on "Forgot Password" button on the landing page.**



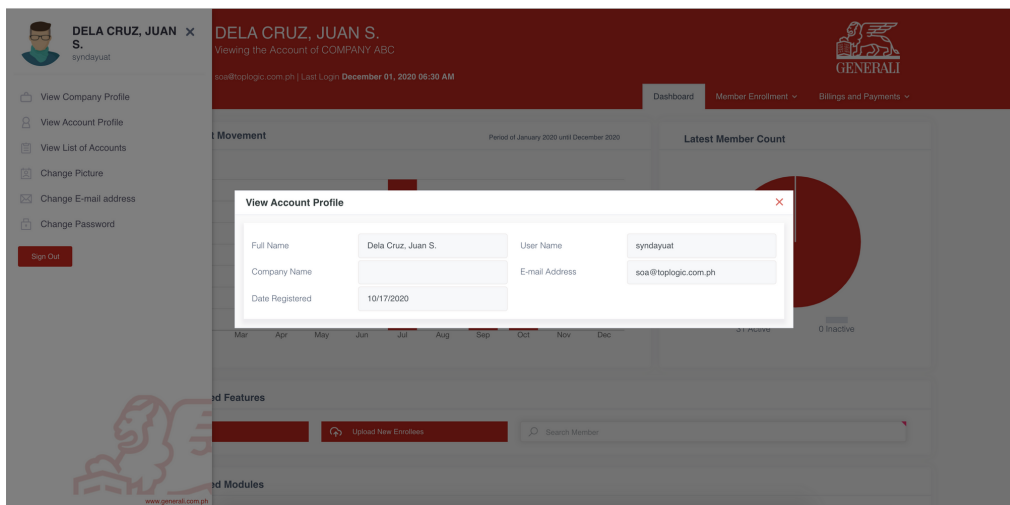
- Provide your username or email address.
- An email with the new assigned password will be sent to the given email address or the email address assigned to the username provided.

03 How to View Company and Account Profile

To view company information, from the sidebar, **click "View Company Profile".**



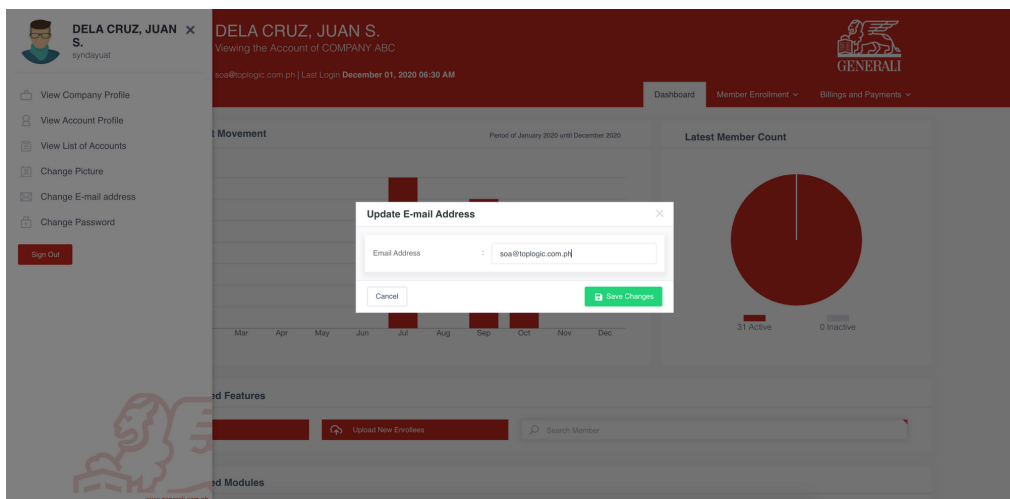
To view user account information, from the sidebar, **click "View Account Profile"**.



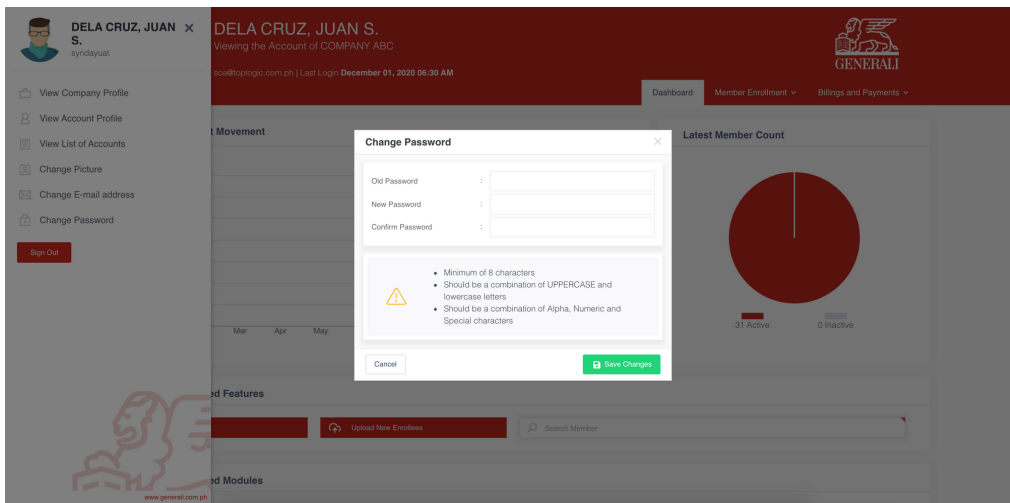
04 How to Change Picture, Email Address and Password

To change profile picture, from the sidebar, **click "Change Picture"**. Choose image to upload.

To change email address, from the sidebar, **click "Change Email Address"**.



To change password, from the sidebar, **click "Change Password"**.



05 How to View Accredited Providers

From the **dashboard**, click on **"View Accredited Hospitals & Clinics"**.

The dashboard header shows the user profile for **DELA CRUZ, JUAN S**, viewing the account of **THE BRIGHT COMPANY**. The navigation menu includes **Dashboard**, **Member Enrollment**, and **Billings and Payments**. The main content area features a **Member Enrollment Movement** bar chart for the period of January 2020 until December 2020, showing 20 active members in October. A **Latest Member Count** pie chart shows 20 Active and 0 Inactive members. The **Frequently Accessed Modules** section includes buttons for **Enrolled Members**, **Member Upload Logs**, **Unsettled Billings**, and **View Accredited Hospitals & Clinics**, which is highlighted with a red box.

Accredited Hospitals and Clinics

Search Clinic or Provider Name

Provider Name	Coordinator	Business Address	Business Phone
A B C - ALABANG		#09090	
A. ZARATE GENERAL HOSPITAL		ATLAS COMPOUND NAGA RD. PULANG LUPA LAS PIÑAS CIT	02-8746903
A.C. MEDLINKS SPECIALTY CLINICS AND DIAGNOSTIC CENTER			
ABC HOSPITAL		BAYANI RD.	
ABCDE	CDE	32ND STREET	
ABESAMIS EYE CARE & CONTACT LENS CENTER	DR. CARMEN DICHOSO	SUITE 904 MEDICAL PLAZA MAKATI	8133482
ABESAMIS EYE CARE & CONTACT LENS CENTER	DR. CARMEN DICHOSO	UNIT 261 ENTERTAINMENT MALL, 2/F SOUTH WING, MALL OF ASIA, BAY CITY, PASAY CITY	556-0810
ABS		ROSARIO, BATANGAS	
ACC PHYSICAL THERAPY CLINIC		MEDICAL ARTS COMPOUND, BAUTISTA HOSPITAL, P. BURGOS AVE., CARIDAD, CAVITE CITY	046-4848604 / 0925-7222782
ACC PHYSICAL THERAPY CLINIC		UNIT B ROMA BLDG., MAGDIWANG HIGHWAY, NOVELETA, CAVITE	046-4388303 / 0925-6222782
ACCELERATED WELLNESS & PAIN CLINIC		12 CONCEPCION CONDO UNIT 212 GENERAL CONCEPCION STREET BAGONG BARRIO CALOOCAN CIY	
ACCESSHEALTH, INC.			

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06 How to View Company Benefit Plan

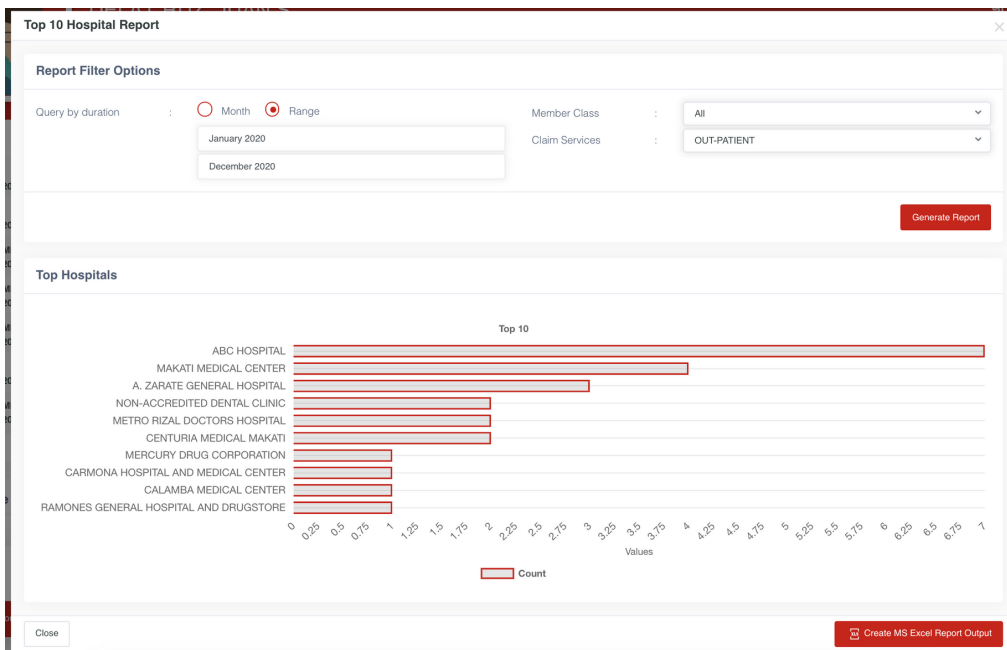
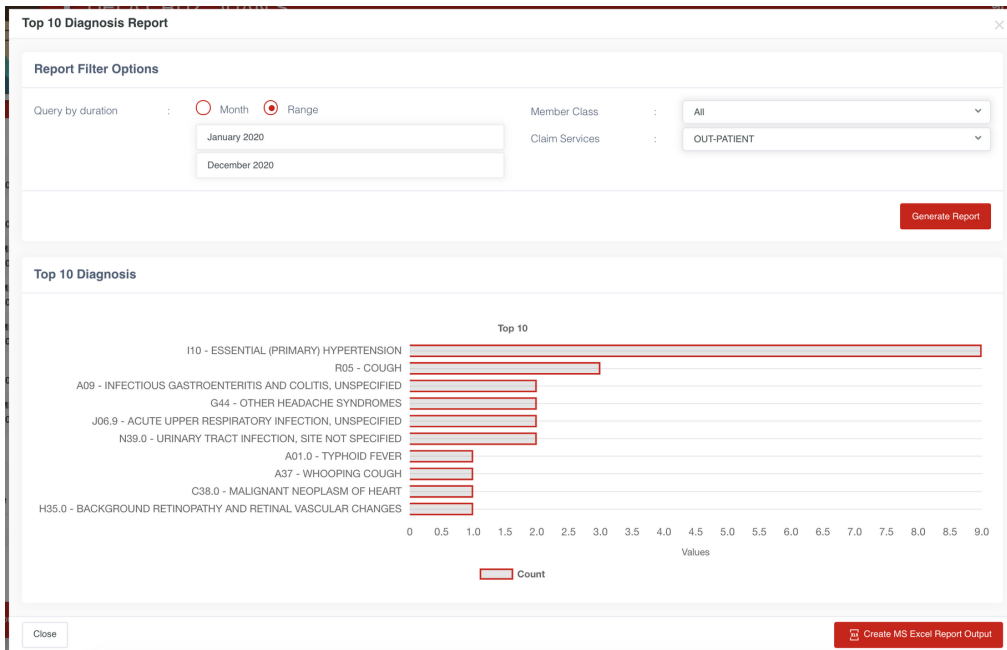
From the dashboard, **click on "Schedule of Benefits"**.

The screenshot shows the dashboard for DE LA CRUZ, JUAN S. The top navigation bar includes 'Dashboard', 'Member Enrollment', and 'Billings and Payments'. The main content area features two charts: 'Member Enrollment Movement' (a bar chart showing 20 active members in October) and 'Latest Member Count' (a pie chart showing 20 Active and 0 Inactive members). Below these charts is the 'Available Reports' section, which contains four report cards: 'Schedule of Benefits' (highlighted with a red box), 'Diagnostics', 'Provider Utilization', and 'Life Reports'. Each card has a 'View Report' or 'Export to Excel' button.

07 How to View Benefit Utilization Report

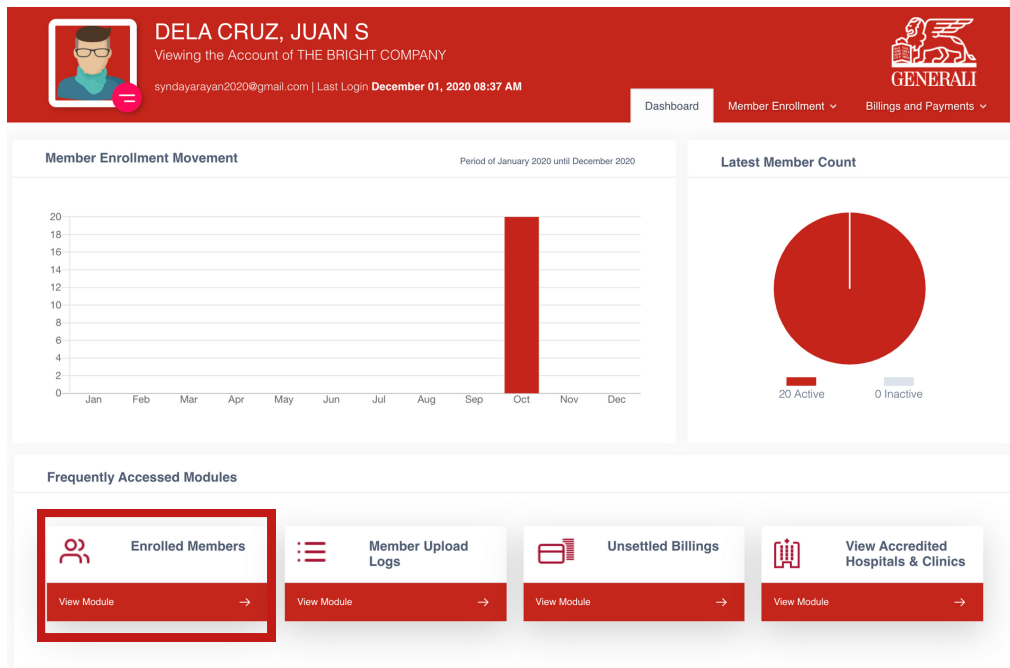
From the dashboard, **click on "Diagnostics" for Top 10 diagnosis report of employees or "Provider Utilization" for Top 10 utilized provider of employees.**

This screenshot is identical to the one above, showing the dashboard for DE LA CRUZ, JUAN S. In this instance, the 'Diagnostics' and 'Provider Utilization' report cards in the 'Available Reports' section are highlighted with red boxes, indicating they are the focus of the instruction.



08 How to Enroll Employees

Member Enrollment tab displays all members enrolled in the current Policy Period. This tab allows changing the member's information as well as terminate the member's enrollment. To access this feature, click Member Enrollment Tab. then **click "Enrolled Members"**.



- **Search Filters** - these are the basic search filters that are commonly used by the user to search for a specific record.
- **Reset** – this allows the user to reset or empty the search filters at once, instead of deleting the search terms used one by one.
- **Advanced Query** – to access, the user should toggle the Advance Query button. It allows the user to further refine their search query.
- **Report Option:**
 - Export Members – this allows the user to export the list of members to excel file
 - Export Members w/ Sum Assured – this allows the user to request the list of members with sum assured information

08 How to Enroll Employees

Enrolled Members tab displays all members enrolled in the current Policy Period.

This tab allows **adding, changing, and terminating a member's enrollment.**

This feature allows the user to **individually register a member** by manually inputting the information. To access this feature, click Member Enrollment Tab. then **click "Enrolled Members"**.

The screenshot shows the user interface for Juan S. De la Cruz, viewing the account of THE BRIGHT COMPANY. The dashboard includes a navigation menu with 'Dashboard', 'Member Enrollment', and 'Billings and Payments'. The main content area features a 'Member Enrollment Movement' bar chart for the period of January 2020 to December 2020, showing 20 active members in October. A 'Latest Member Count' pie chart shows 20 Active and 0 Inactive members. Below these charts is a 'Frequently Accessed Modules' section with four buttons: 'Enrolled Members', 'Member Upload Logs', 'Unsettled Billings', and 'View Accredited Hospitals & Clinics'. The 'Enrolled Members' button is highlighted with a red box.

To create new member, from the Enrolled Members Ledger, **click [+] button on the upper right corner.**

The screenshot shows the 'Creating New Enrollee' form. The form is divided into two columns of input fields. The left column includes: Effective Date * (mm/dd/yyyy), Classification * (Select Member Classification), Employee Number *, Certificate Number, Last Name *, First Name *, Middle Initial, Suffix, Birthdate * (mm/dd/yyyy), Gender * (Select Gender), and Civil Status * (Select Civil Status). The right column includes: Occupation, Home Phone, Office Phone, Office Fax, Department, SSS Number, Philhealth Number, TIN, Billing Class * (Select Billing Class), Cost Center, and Salary (0.00). At the bottom left is a 'Cancel' button, and at the bottom right is a green 'Save (F8)' button.

You can **enroll employees by batches**. The Member Upload tab functionalities allows **uploading of members per categories such as by New, Renewal, Termination or by Amendment of Profile**. This is classified into Generali Template and Custom Template. This tab also allows the user to view all batch of members uploaded along with the information of its upload.

To access this feature, click Member Enrollment Tab then **click "Member Upload Logs"**.

DELA CRUZ, JUAN S
Viewing the Account of THE BRIGHT COMPANY
syndayarayan2020@gmail.com | Last Login **December 01, 2020 08:37 AM**

Dashboard | Member Enrollment | Billings and Payments

Member Enrollment Movement (Period of January 2020 until December 2020)

Latest Member Count

Frequently Accessed Modules

- Enrolled Members (View Module)
- Member Upload Logs (View Module)**
- Unsettled Billings (View Module)
- View Accredited Hospitals & Clinics (View Module)

DELA CRUZ, JUAN S
Viewing the Account of SPLENDA MARKETING INC.
soa@toplogic.com.ph | Last Login **December 01, 2020 06:30 AM**

Dashboard | **Member Upload Logs** | Billings and Payments

...	10/19/2020 - 04:57 PM	NEW	20201019-2400	EVALUATED WITH FINDINGS	0	0	0	0	THIS IS FOR REUPLOADING, MISSING INFORMATION.	
...	10/19/2020 - 04:53 PM	NEW	20201019-2399	BILLED	0	0	0	0		
...	10/19/2020 - 04:50 PM	NEW	20201019-2398	201075741	CANCELLED	0	0	0	PLEASE CHECK THE BREAKDOWN IN THE GENPORTAL FOR THE DETAILED REMARKS.	
...	10/19/2020 - 01:38 PM	NEW	20201019-2393	201075740	ENDORSED TO BILLING	2	1	1	0	THE FILE WAS SUCCESSFULLY UPLOADED AND IS NOW ENDORSED FOR BILLING.
...	10/19/2020 - 01:35 PM	NEW	20201019-2392		EVALUATED WITH FINDINGS	2	1	1	2	PLEASE CHECK THE BREAKDOWN IN THE GENPORTAL FOR THE DETAILED REMARKS.
...	10/19/2020 - 01:14 PM	NEW	20201019-2390		EVALUATED WITH FINDINGS	2	1	1	2	PLEASE CHECK THE BREAKDOWN IN THE GENPORTAL FOR THE DETAILED REMARKS.
...	10/19/2020 - 11:52 AM	NEW	20201019-2388		EVALUATED WITH FINDINGS	0	0	0	0	SAMPLE
...	10/19/2020 - 11:23 AM	NEW	20201019-2387		APPROVED	0	0	0	0	
...	10/19/2020 - 10:37 AM	NEW	20201019-2386		APPROVED	0	0	0	0	
...	10/19/2020 - 08:52 AM	NEW	20201019-2385		APPROVED	0	0	0	0	
...	10/19/2020 - 08:39 AM	NEW	20201019-2383		APPROVED	0	0	0	0	

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09 How to Enroll Beneficiary/ies and Dependents

The Enrolled Beneficiaries tab displays all manual and uploaded beneficiaries. To access this feature, **click "Member Enrollment" Tab then click "Enrolled Beneficiaries"**.

The screenshot shows the 'Enrolled Beneficiaries' tab in a web application. At the top, there is a user profile for 'DELA CRUZ, JUAN S.' with a last login of 'December 01, 2020 06:30 AM'. The main area contains a table of beneficiaries and a summary table below it.

Employee Certificate No.	Employee Last Name	Employee First Name	Employee Birthdate	Beneficiary First Name	Beneficiary Middle Name	Beneficiary Last Name	Beneficiary % Distribution	Beneficiary Relationship
2695400-00	ARAYAN	SYNDAY	09/28/1993	CAMILLE		T	0	G
2695393-00	DE DIOS	MARVIN	10/14/1987	SYNDAY		CRUZ	50	COUSIN
2695393-00	DE DIOS	MARVIN	10/14/1987	JOSE		DEDIOS	50	BROTHER

Batch No.	File Name	Status	Total Rows	Failed Rows	Remarks	Date Notified	Uploaded By
20200925-1087	2746_BENEFICIARY - 09252020.XLSX	PROCESSED	3	0		09/25/2020	ARAYAN, SYNDAY
20200925-1086	3908_BENEFICIARY - 09252020.XLSX	PROCESSED	1	0		09/25/2020	ARAYAN, SYNDAY
20200925-1084	8089_BENEFICIARY - 09252020.XLSX	FAILED	1	1	HAS INVALID ROWS.	09/25/2020	ARAYAN, SYNDAY

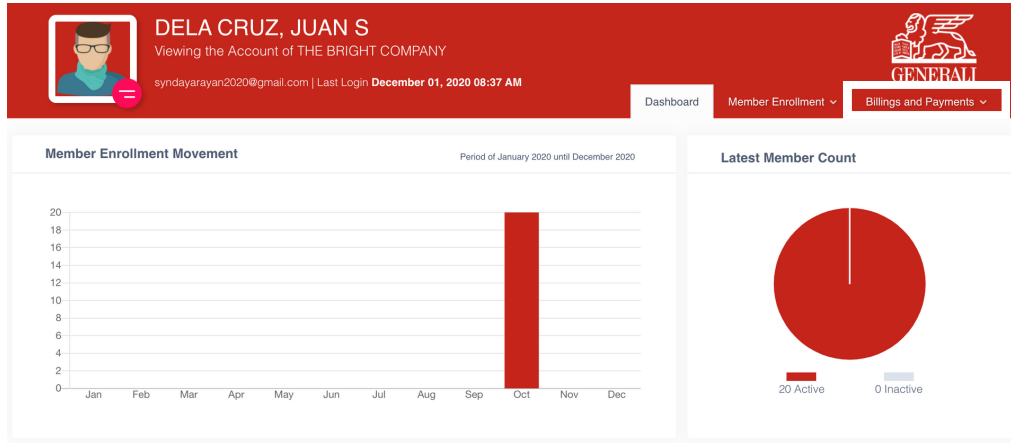
To enroll new beneficiary, from the Enrolled Beneficiaries Ledger **click "Enroll Beneficiary" button on the upper right corner.**

The screenshot shows a form titled 'Add Beneficiaries for ARAYAN, SYNDAY A'. It contains a table with one beneficiary entry: CAMILLE, T, G, 0. Below the table is a 'Beneficiary Information' section with input fields for First Name, Middle Name, Last Name, Suffix, Relationship, and % Distribution. There is also a 'Disclaimers' section with a checkbox for 'I have read and agree with the above disclaimers'. At the bottom right, there are buttons for '+ Add Beneficiary' and 'Save (F8)'. The total distribution is shown as 0%.

- User should **select first a principal member** to be able to enroll new beneficiary.
- The **% Distribution should be equal to 0% or 100%** to allow saving the beneficiary records.

10 How to View Unsettled Bill/s

The Unsettled Billing tab displays all the unsettled billing records of the account. To access this feature, **click "Billings and Payments" tab then click "Unsettled Billings"**.



The Unsettled Billings tab for DE LA CRUZ, JUAN S. (Account of COMPANY ABC) displays the following table:

View SOA	Bill No.	Bill Date	Bill Due	Billing For	Type	Bill Amount	Gross Amount	Adjustment	Paid Amount
...	FY2009108784	09/17/2020	10/17/2020	PREMIUM	MODAL	434,604.60	434,604.60	0.00	0.00
...	FY2009108765	09/08/2020	10/08/2020	PREMIUM	MODAL	294,885.90	294,885.90	0.00	0.00
...	FY2009108761	09/08/2020	10/08/2020	PREMIUM	MODAL	294,885.90	294,885.90	0.00	0.00
...	FY2009108758	09/01/2020	07/25/2020	PREMIUM	INITIAL	31,048.60	31,048.60	0.00	0.00

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11 How to Post Payment

The Payment Details for Posting tab allows user to view all posted payments. To access this feature, **click "Billings and Payments" tab then click "Payment Details for Posting"**.

Attachment	Update	Resend Email	Payee Name	Check Date	Check Number	Bank	Bank Branch	Amount	TIN	Address to pick up Check
			MARIA SANTOS	09/25/2020	1235847	METROBANK	MAKATI CITY	50,000.75	312-548-751-230	MAKATI CITY

To create new payment, from the Payment Details for Posting Ledger, **click [+] button on the upper right corner.**

Posting Check Payment / Pickup

Payee Name * :

Check Date * :

Check Number * :

Bank * :

Bank Branch * :

Amount * :

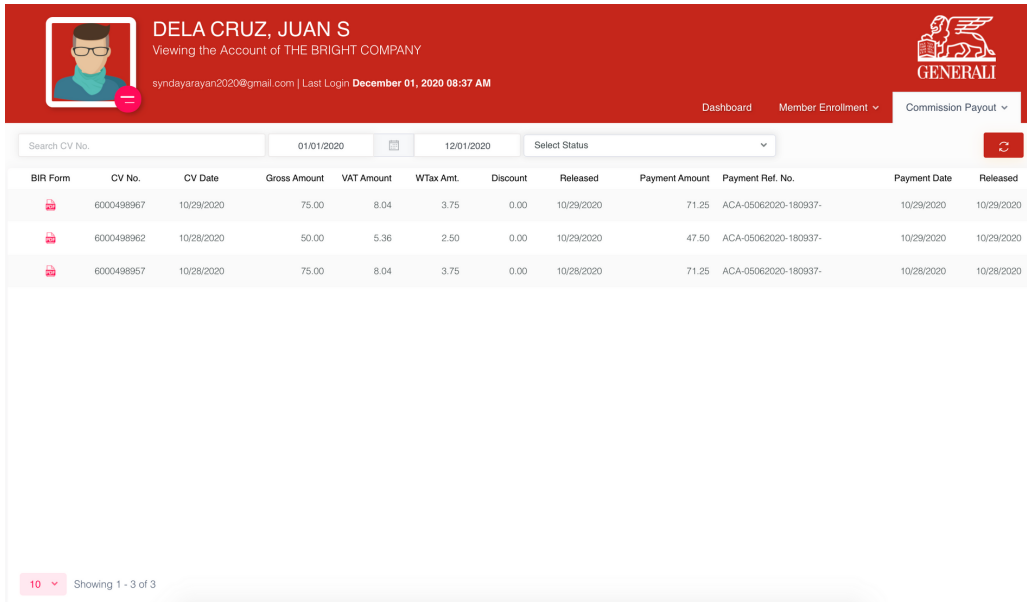
TIN * :

Address to pick up Check * :




Breakdown or Invoices :

12 How to View Commission Details

The Commission Payout tab allows user to view the breakdown of payment received for commission. To access this feature, **click "Billings and Payments" tab then click "Commission Payout"**.



The screenshot displays the user interface for viewing commission payout details. The header shows the user's name, DE LA CRUZ, JUAN S, and the account name, THE BRIGHT COMPANY. The user is logged in as syndayarayan2020@gmail.com, with a last login on December 01, 2020 at 08:37 AM. The interface includes a navigation menu with options for Dashboard, Member Enrollment, and Commission Payout. Below the header, there are search filters for CV No., dates (01/01/2020 to 12/01/2020), and a Select Status dropdown. A table lists three payment records with columns for BIR Form, CV No., CV Date, Gross Amount, VAT Amount, WTax Amt., Discount, Released, Payment Amount, Payment Ref. No., Payment Date, and Released. The table shows three records with varying amounts and dates. A footer indicates that 10 records are shown, with the first 3 of 3 displayed.

BIR Form	CV No.	CV Date	Gross Amount	VAT Amount	WTax Amt.	Discount	Released	Payment Amount	Payment Ref. No.	Payment Date	Released
	6000498967	10/29/2020	75.00	8.04	3.75	0.00	10/29/2020	71.25	ACA-05062020-180937-	10/29/2020	10/29/2020
	6000498962	10/28/2020	50.00	5.36	2.50	0.00	10/29/2020	47.50	ACA-05062020-180937-	10/29/2020	10/29/2020
	6000498957	10/28/2020	75.00	8.04	3.75	0.00	10/28/2020	71.25	ACA-05062020-180937-	10/28/2020	10/28/2020

- **Search Filters** - these are the basic search filters that are commonly used by the user to search for a specific record.
- **Reset** – this allows the user to reset or empty the search filters at once, instead of deleting the search terms used one by one.
- **BIR Form** – this allows the user to view the BIR Form of the selected CV. This is applicable if the record has WTax computation.