Administrator Portal Guide

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QUIKCARD™ Easy Affordable Flexible

Administrator Portal Guide

INITIAL LOG IN TO NEW PORTAL

The new Quikcard portal can be accessed at **quikcard.com** by clicking the “Log In” link at the top of the page.

You will need to enter your current **User ID** and **Password**, then click the **Sign In** button.

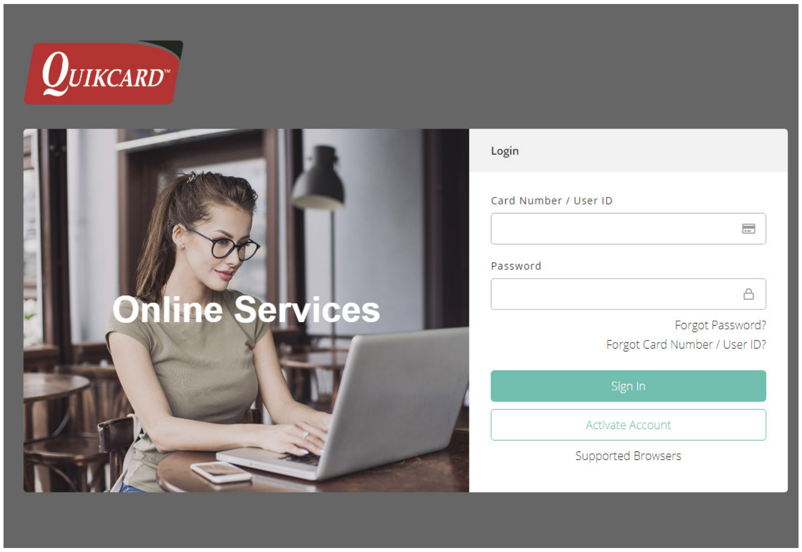
You will be prompted to change your password for the new portal. This prompt will only come up on your initial log in to the new portal, and not on subsequent visits.

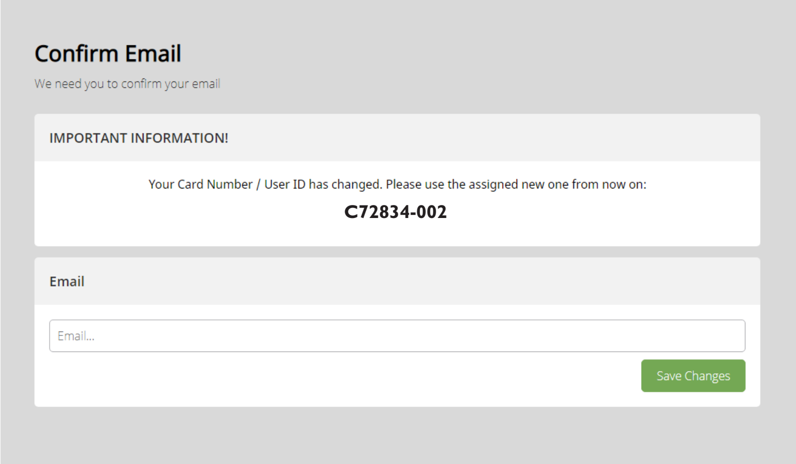
**Passwords require 9 to 30 characters, one upper case, one lower case, one number, and one special character.*

On the Confirm Email page you will be issued a new **User ID**. Record this information as **your old User ID will no longer be valid.**

Enter your email address to confirm it and click the **Save Changes** button.

You will then be taken to the **Plan Administrator Dashboard**.





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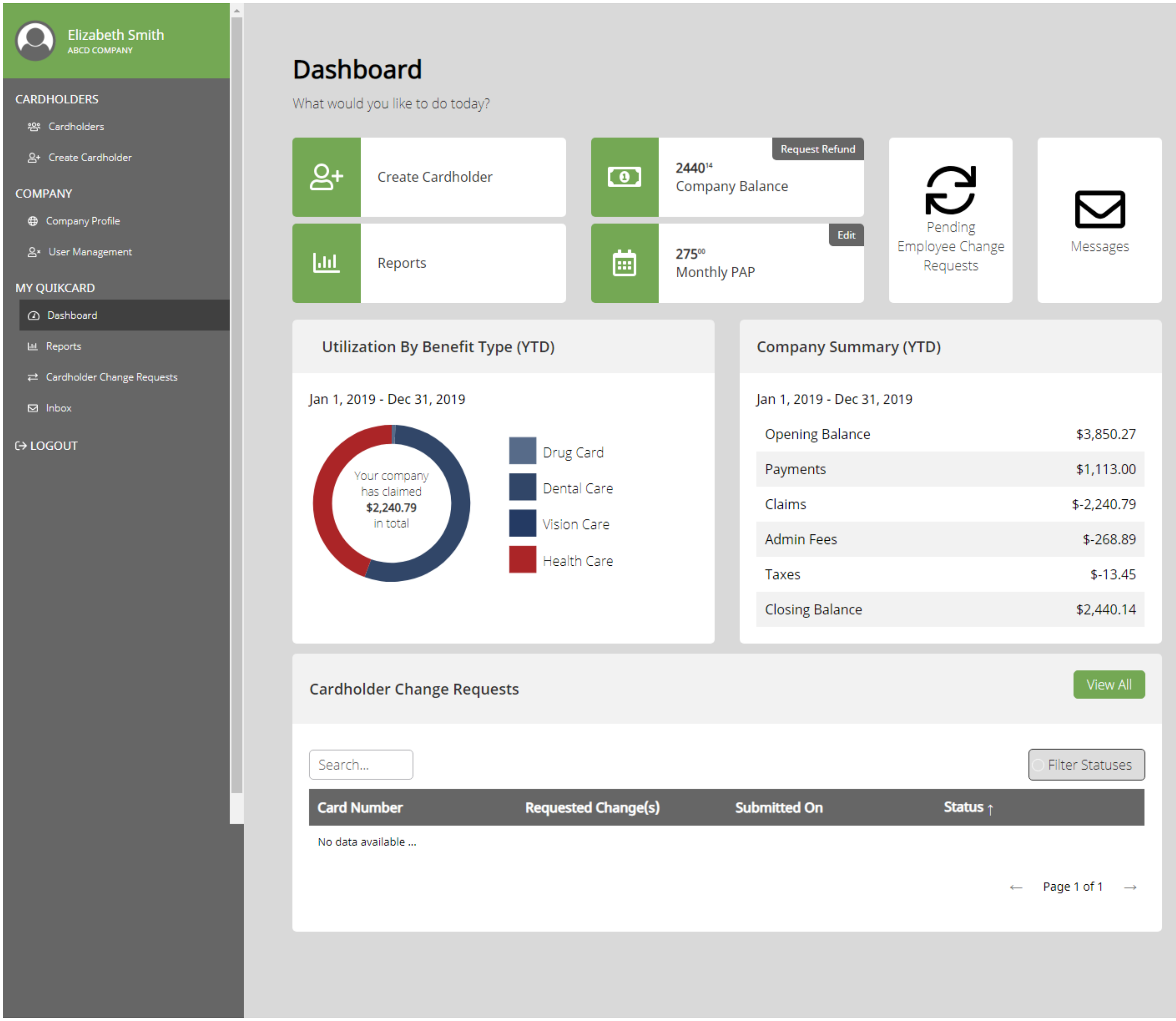
PLAN ADMINISTRATOR DASHBOARD



Here you will be given an overview of your account and will be able to select actions from the menu on the left, or the dashboard itself.

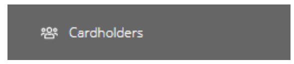
Some of the main actions you can select are:

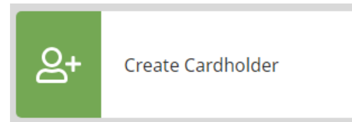
- **Manage Cardholders**
- **Generate Reports**
- **Request a Refund**
- **Review Cardholder Change Requests**
- **Manage Monthly Payments**

Administrator Portal Guide

MANAGING CARDHOLDERS

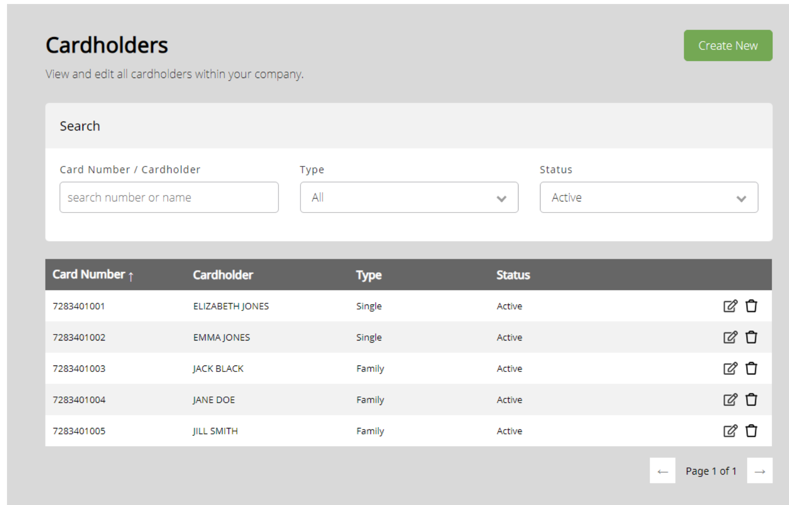
Start by clicking the **Cardholders** link in the left hand menu.





The **Cardholders Dashboard** will display all cardholders on your plan, 10 to a page. You can arrange the list by **Card Number**, **Name**, **Type** or **Status**.

You can also seach for specific cardholders by **Card Number** or **Name**, and filter results by **Type** and **Status**.



ADD A CARDHOLDER

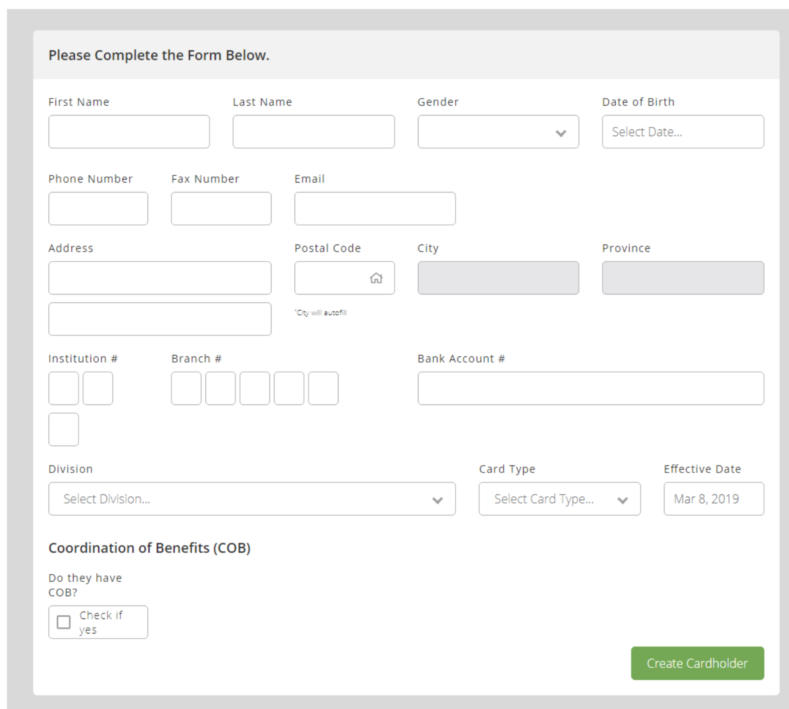
Click **Create New** button on Cardholder dashboard, or **Create Cardholder** on Plan Administrator dashboard.

You will need to fill out the following information:

- **First Name**
- **Last Name**
- **Gender**
- **Date of Birth**
- **Email**
- **Address**
- **Postal Code**
- **Division**
- **Card Type**

Banking information, coordination of benefits, and dependents can also be added, or left blank for the cardholder to fill in.

Once all necessary fields are completed, click the **Create Cardholder** button, and you will be returned to the Cardholders dashboard.



EDIT CARDHOLDER

From the Cardholder dashboard, click the **Pencil** icon next to the cardholder you wish to edit.

You can choose to update **Marital Status**, **Division**, **Profile**, or **View Coordinated Benefits**.

Make sure to click the **Confirm** or **Update Cardholder** button to save any changes.

TERMINATE CARDHOLDER

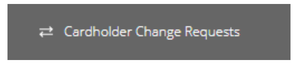
From the Cardholder dashboard, click the **Trashcan** icon next to the cardholder you wish to terminate.

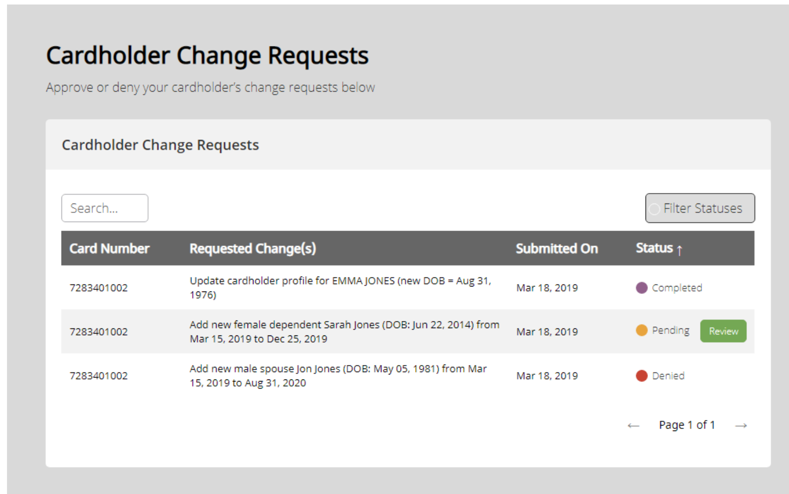
Select a **Termination Date** and click the **Confirm** button. On the termination date the cardholder will be removed from your plan.

Administrator Portal Guide

CARDHOLDER CHANGE REQUESTS

Cardholder Change Requests can be viewed on the Plan Administrator dashboard, or by clicking the **Cardholder Change Requests** link in the left hand menu.





ORGANIZING REQUESTS

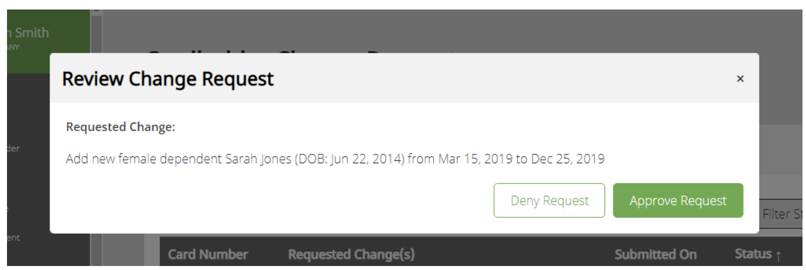
The Cardholder Change Requests dashboard displays all requested changes defaultly by **Status**, but can also be organized by **Card Number** or **Submitted On** date.

SEARCHING REQUESTS

You can search requests by **Card Number** or **Name**, and filter requests by status with the **Filter Statuses** button.

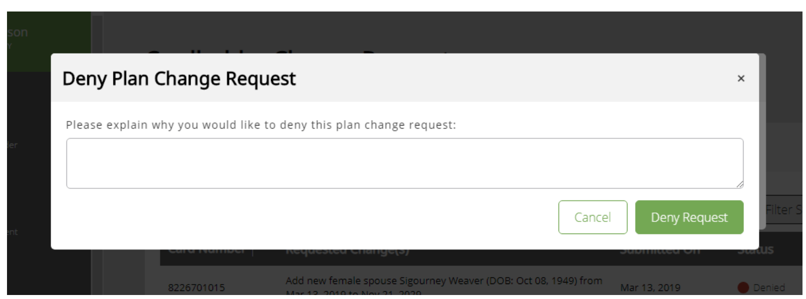
REVIEWING REQUESTS

A request can be reviewed by clicking the green **Review** button next to it.



This will open a pop-up window with the details of the requested change, and buttons to either **Deny Request** or **Approve Request**.

If you deny a request, another pop-up window will open requiring you to explain why the request was denied. Once you have entered an explanation, click the **Deny Request** button again to confirm.



If you approve a request, the changes will be made immediately, or on the specified date, depending on the request.

Administrator Portal Guide

MANAGE MONTHLY PAYMENTS

Through the Plan Administrator dashboard you can manage your monthly payments, changing the amount, suspending them, or you can also do a one-time PAP.

To start, click the **Monthly PAP** button on the Plan Administrator dashboard.

A pop-up form will appear. Most information will be auto-filled based on your company profile, and the profile of the administrator making the change.

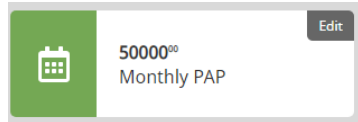
To change the amount of your monthly payments, change the number displayed in the **Amount** field to your desired payment.

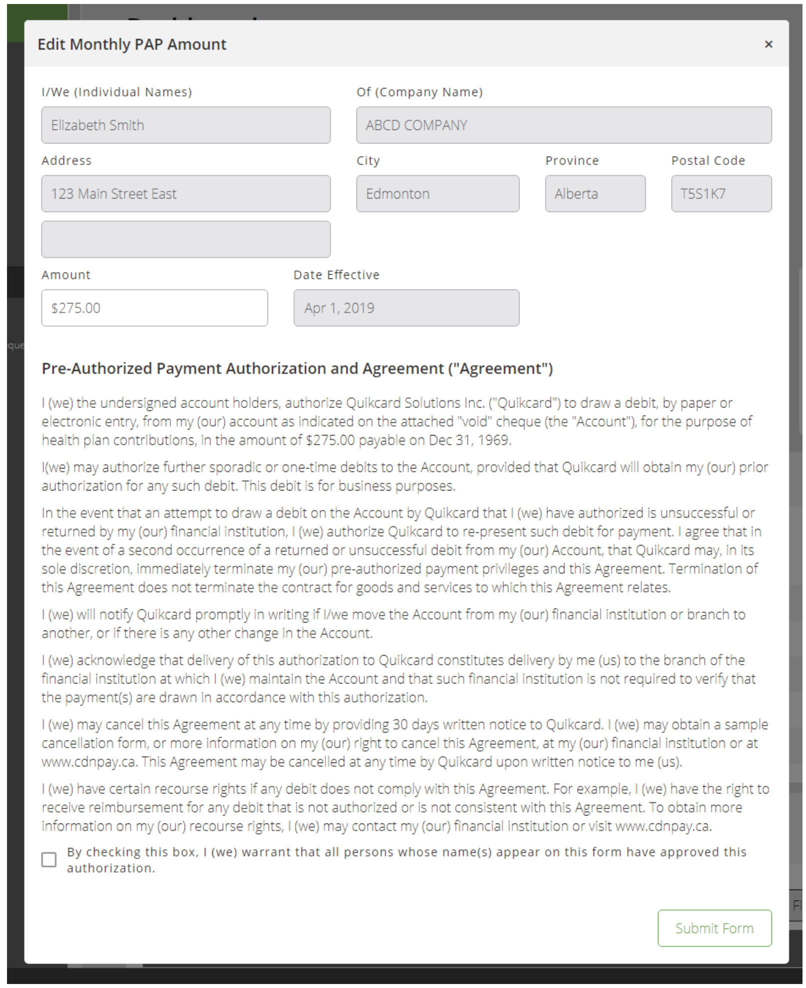
If you wish to suspend payments, change the number in the **Amount** field to **$0.00**.

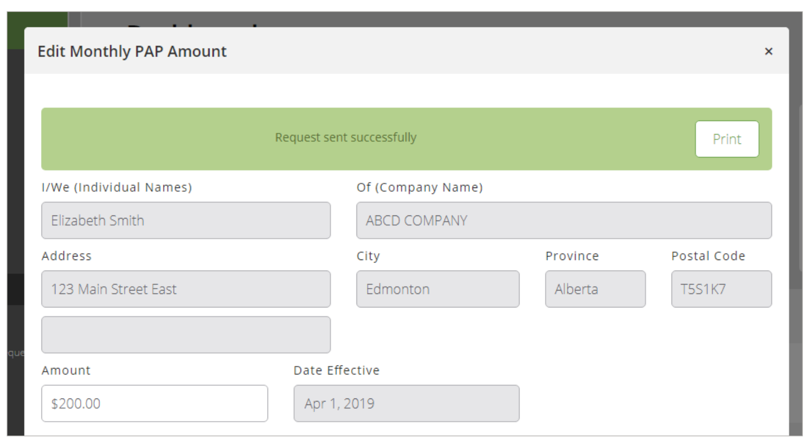
Any changes requested will be made on the first of the following month.

Once you have entered the desired amount, click the **Authorization** check box, then the **Submit Form** button.

The website will take a moment to process the request, then display a **Request Sent Successfully** message with a **Print** button you can use to save a copy of the change request.







REQUEST A REFUND

Through the Plan Administrator dashboard you can request a refund from your company balance.

To start, click the **Company Balance/Request Refund** button on the Plan Administrator dashboard.

A pop-up form will appear. Most information will be auto-filled based on your company profile, and the profile of the administrator making the change.

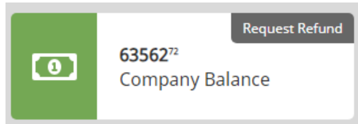
The **Available Refund Amount** field will display the maximum amount of refund you can request.

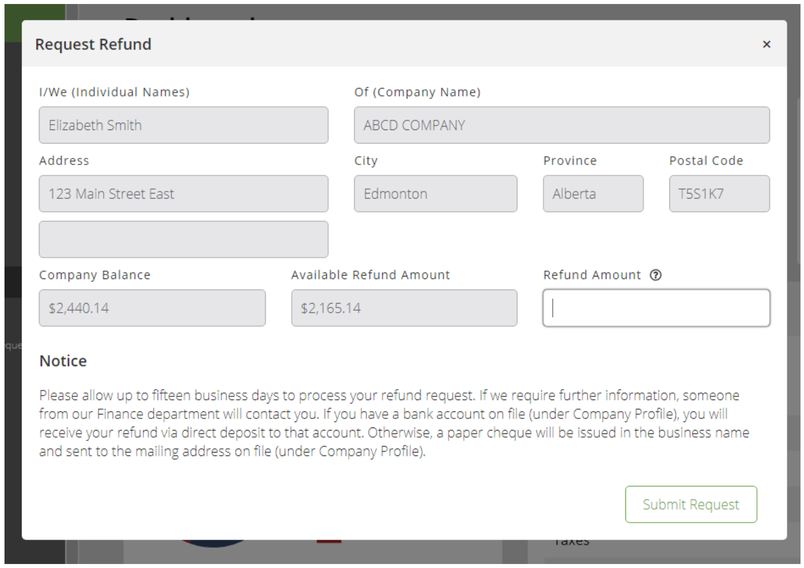
Enter the dollar amount of the refund you would like to recieve in the **Refund Amount** field, and then click the **Submit Request** button.

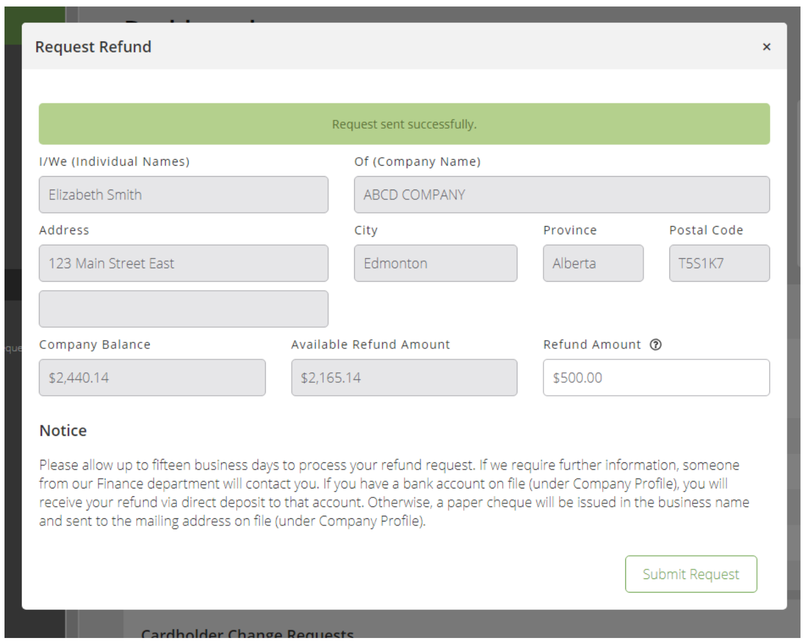
You should see a **Request Sent Successfully** message.

Please allow up to fifteen business days to process your refund request.

You will receive your refund via direct deposit to the bank account on file. Otherwise, a paper cheque will be issued in the business name and sent to the mailing address on file (under Company Profile).







GENERATING REPORTS

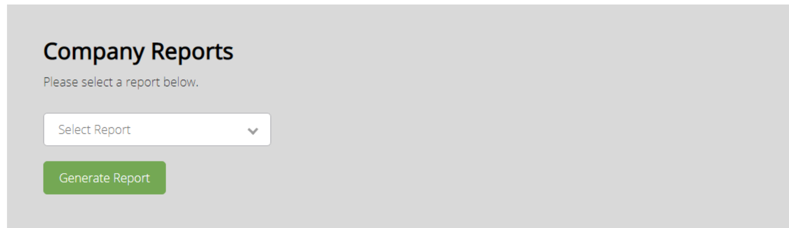
To generate a report, start by clicking the Report link in the left hand menu.

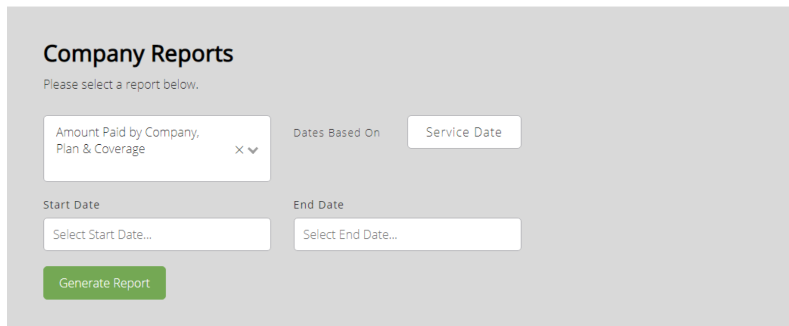
You can choose from six different reports:

- **Amount Paid by Company, Plan & Coverage**
- **Benefit Utilization**
- **Card Count**
- **Cardholder List**
- **Company Financial Statement**
- **Unpaid Claims**

Depending on the type of report you choose to generate you may need to select parameters of a **Start Date** and an **End Date**.

Once you've set the parameters, click the **Generate Report** button. A PDF of the report will be downloaded to your computer.





QUIKCARD™

ABCD COMPANY
123 Main Street East
Edmonton, Alberta, T5S1K7
Canada

18/03/2019
Company No.: 72834

Company Card List Report

Plan No.: 72834001001

Card Number	Cardholder	Card Type	Effective Date	Expiry Date	Gender	Date of Birth
7283401004	DOE, JANE	F	Jan 1, 2018	-	F	Oct 25, 1958
Total Cards on Plan: 1						

Plan No.: 72834001001

Card Number	Cardholder	Card Type	Effective Date	Expiry Date	Gender	Date of Birth
7283401003	BLACK, JACK	F	Jan 1, 2018	-	M	Nov 26, 1973
7283401005	SMITH, JILL	F	Jan 1, 2018	-	F	Jul 20, 1959
Total Cards on Plan: 2						

Plan No.: 72834001001

Card Number	Cardholder	Card Type	Effective Date	Expiry Date	Gender	Date of Birth
7283401001	JONES, ELIZABETH	S	Jan 1, 2018	-	F	Mar 30, 1969
7283401002	JONES, EMMA	S	Jan 1, 2018	-	F	Aug 31, 1977
Total Cards on Plan: 2						

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