



Group Management Portal Quick Start Guide

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Table of Contents

Overview	3
Accessing the Portal	4
Managing a Group	4
Viewing Your Members	4
Adding a New Member	5
Update an Existing Member	5
Activate or Terminate a Member	5
Resending Welcome Emails	6
Viewing, Printing, and Paying Invoices in the Portal	6
Managing your Census Files	7
Bulk Member Importing	7
Download Member Census File Template	7
Export Current Member Census	7
Member Census - File Layout & Data	8
Questions?	9

Overview

This document aims to be a quick start guide on the group management portal for RelyMD.

For additional questions, please email newbusiness@relymd.com.

Accessing the Portal

You can access the group management portal at the following URL:

<https://portal.myidealdoctortelehealth.com>

If you have not received a welcome email with instructions to setup your account, you can request one by sending an email to newbusiness@relymd.com.

*Please make sure the person responsible for your membership (adds, terminations, etc.) and the person responsible for invoices are setup with access to the portal. **Provide the name, email, phone number and address for each contact.***

Managing a Group

There are multiple ways to manage your group(s) in the portal.

Dashboard

From your [dashboard](#), click the blue **Manage** button for the group you want to manage.

Global Search

Using the global search box at the top of every page, type the name of the group you are looking for and select it from the list.

Employer Groups Page

From [the employer groups page](#), find and click on the name of the group you want to manage.

Viewing your Members

The members listing screen allows you to add new members, updating existing members, export your census file, and more.

To view your members:

1. Go to the overview screen for a group (See Managing a Group above)
2. Click the **Members** link in the navigation area of the "Group Header Card" (this is the box near the top of the page with the name of the group, group ID, etc.)

Adding a New Member

Members can be added individually and through a bulk import process. See Bulk Member Importing for instructions on setting up a bulk import.

NOTE: Any changes to your membership made after the 3rd of each month will not be effective until the 1st of the next month.

1. Go to the members screen for a group (See Viewing your Members)
2. Click the blue **New Member** button.
3. Fill out the information and click **Save**.

Updating an Existing Member

Members can be updated individually and through a bulk import process. See Bulk Member Importing (page 7) for instructions on setting up a bulk import.

1. Go to the members screen for a group (See Viewing your Members, page 4)
2. Locate the member in the list
3. Click the dropdown menu icon (3 vertical dots) to the right of the member's record
4. Select **Edit Member** from the dropdown.
5. Fill out the information and click **Save**.

Activate or Terminate a Member

You can activate and terminate members at any time, but they will not become effective until the 1st month. **Activations and termination made between the 1st and 3rd of each month will be effective immediately.**

To activate/terminate a member:

1. Go to the members screen for a group (See Viewing your Members, page 4)
2. Locate the member in the list
3. Click the dropdown menu icon (3 vertical dots) to the right of the member's record
4. Select **Activate Member** or **Terminate Member** from the dropdown.
5. Read and submit the confirmation notice that is shown

Resending Welcome Emails

You can resend welcome emails to your members anytime. To resend welcome letters:

1. Click on the **'Members'** tab under the group's name
2. Click on the down arrow beside **"New Members"** at the top left corner
3. Click on **"Send Welcome Emails"**
4. Search by member name
5. Put a check in the box by the member's name
6. Scroll to the bottom and click on **"Send Emails"**

Viewing, Printing, and Paying Invoices in the Portal

You can view, print and pay invoices from within the portal. Here's how:

1. See the **"Latest Invoices"** section at the top left of your group screen
2. Find the invoice that you want to view and click on the three dots at the right of the invoice
3. Download a PDF of your invoice
 - a. Click on **"Download"**
4. To View the members
 - a. Click on **"View"** to see the members that are being billed for
 - b. Click on the **Service Date** in the body of the email
 - c. This will bring up the members names
 - d. Click on **"Download"** at the top right to print from this screen
5. To pay your invoice online
 - a. While in the View screen click on **"Pay Invoice"** at the bottom
 - b. Enter your information to pay online

Managing your Census Files

To view and manage your census files:

1. Go to the overview screen for a group (See Managing a Group, page 4)
2. Click the Census Files link in the navigation area of the “Group Header Card” (this is the box near the top of the page with the name of the group, group ID, etc.)

Bulk Member Importing

Member information can be imported into the system in bulk using a properly formatted **.CSV** file. See Member Census - File Layout & Data (page 8) for layout and data requirements.

To upload a member census file:

1. Go to the census files screen for a group (See Managing your Census Files)
2. Click the blue **Upload** button
3. Select the file from your computer and click **Upload File**

Download Member Census File Template

You can download a blank copy of the member census file here:

- [Member Census File Template](#)

Export Current Member Census

You can export your current member census into a .CSV file. To export the census:

1. Go to the overview screen for a group (See Managing a Group, page 4)
2. Click the **Reports** dropdown in the navigation area of the “Group Header Card” (*this is the box near the top of the page with the name of the group, group ID, etc.*)
3. Click **Download Member Census** from the dropdown

Member Census - File Layout & Data

The table below outlines the data you may include in the file.

- All required columns must be present in the file.
- A header row must be present in the file.
 - Use the “column” value from this table to specify the columns in your file.

Column	Required	Values	Notes
Plan	Yes	Individual Plan Family Plan	
Member Type	Yes	Primary	Only primary members will be processed
Email Address	No		Highly encouraged. Members without an email address will not receive a welcome email and will need to go through additional steps to setup their account.
First Name	Yes		
Last Name	Yes		
Home Phone	No		
Cell Phone	No		
Gender	Yes	Male Female Unknown Other	
Date of Birth	Yes	MM/DD/YYYY	
Address Line 1	Yes		
Address Line 2	No		
City	Yes		
State	Yes		
Zip Code	Yes		
Employer Code	Yes		The employer code for the member, supplied to you by RelyMD
Other Member ID	No		Field to specify your own ID
Status	Yes	0 – Inactive 1 - Active	
Unique Identifier	No		This field allows you to supply an identifier that is unique to each member. We will use this identifier to find the member in our system. This can be useful in preventing duplicate member records in the event a member's name is changed. NOTE: If this field is not specified for a member, they will be looked up in our system using a combination of first name, last name, date of birth and gender.

Questions?

If you have any questions, please reach out to our team at newbusiness@relymd.com.