

MetLink User Guide - Statement of Health



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MetLink Overview

MetLink is a secure portal, available on both web and mobile platforms, offering a variety of benefit administration capabilities supporting the many products and services available through MetLife.

The MetLink Statement of Health module is accessible 24/7, enabling easy access to information needed to support benefit administration functions.

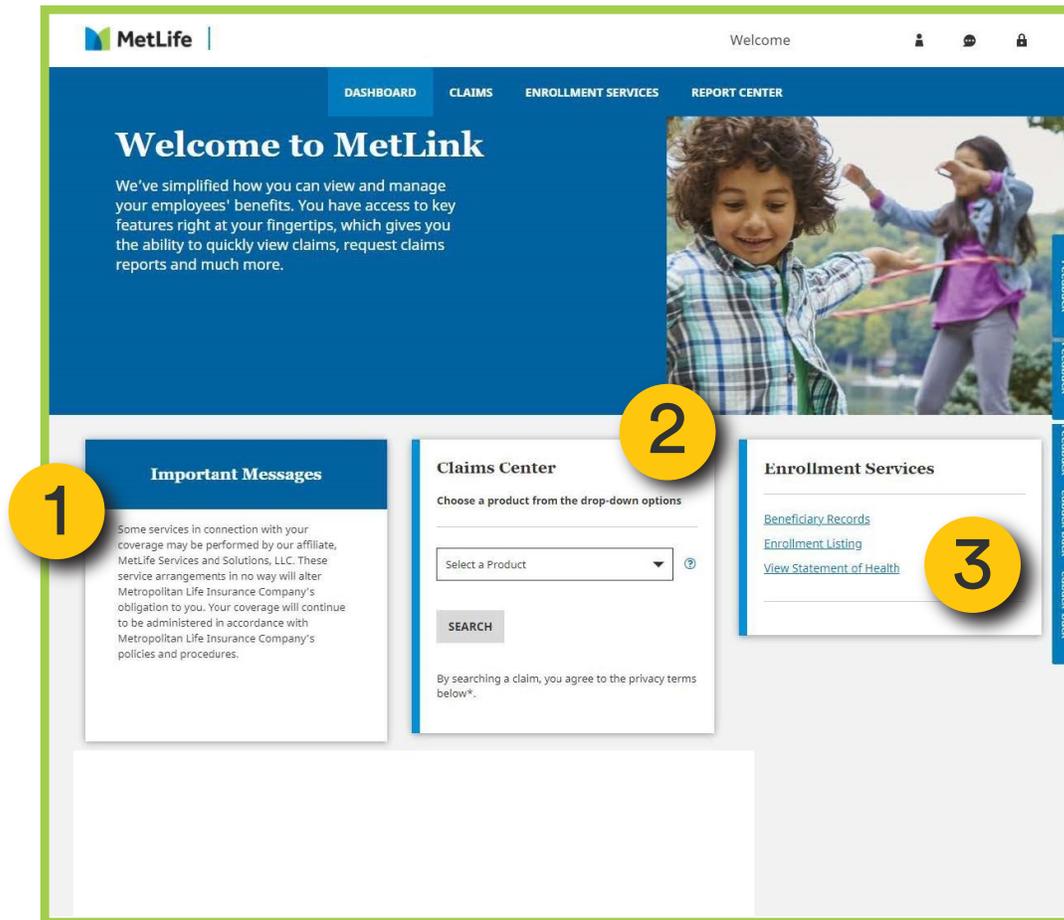
Statement of Health User Guide

The User Guide will help users navigate the Statement of Health capabilities and features available online. The features covered in this guide include:

- ▶ Statement of Health Inquiry
- ▶ Statement of Health Status
- ▶ Downloading and exporting data



Dashboard



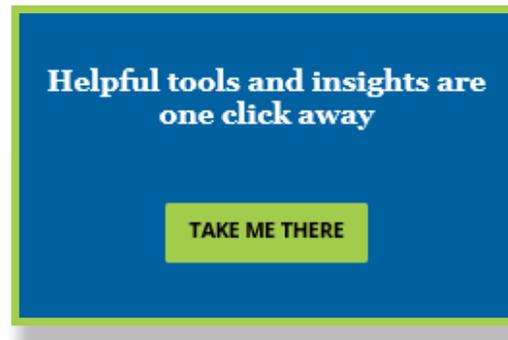
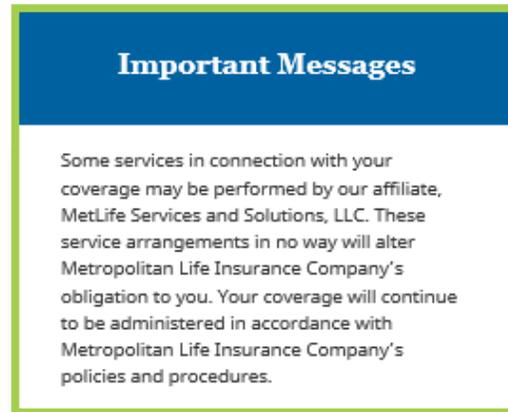
Upon logging in, the user will land on the Dashboard page. The Dashboard tab (located on the navigation bar) is highlighted to let the user know where they are within MetLink.

Based on permissions granted to the user, there are many functions and features available from the Dashboard page that include:

- 1 Important Messages
- 2 Claims Center
- 3 Enrollment Services

Important Messages

The Important Messages feature provides users with access to site-level information such as upcoming maintenance activity, etc. Directional arrows are available to navigate to next or previous messages.



Other Dashboard Features

Links and Features Accessible to all users at the top of the MetLink Dashboard page include:



The Profile Icon allows the user to view and update online account information, including:

- ▶ Contact information: Name, Email, Phone
- ▶ Login information: Username, Password
- ▶ Communication Preferences
- ▶ User Agreements



The Support Icon provides access to the account, product and technical help. Choose a category from the drop-down box to see helpful content related to your selection.



The Logout Icon will immediately log the user out of MetLink and return to the Log In page.

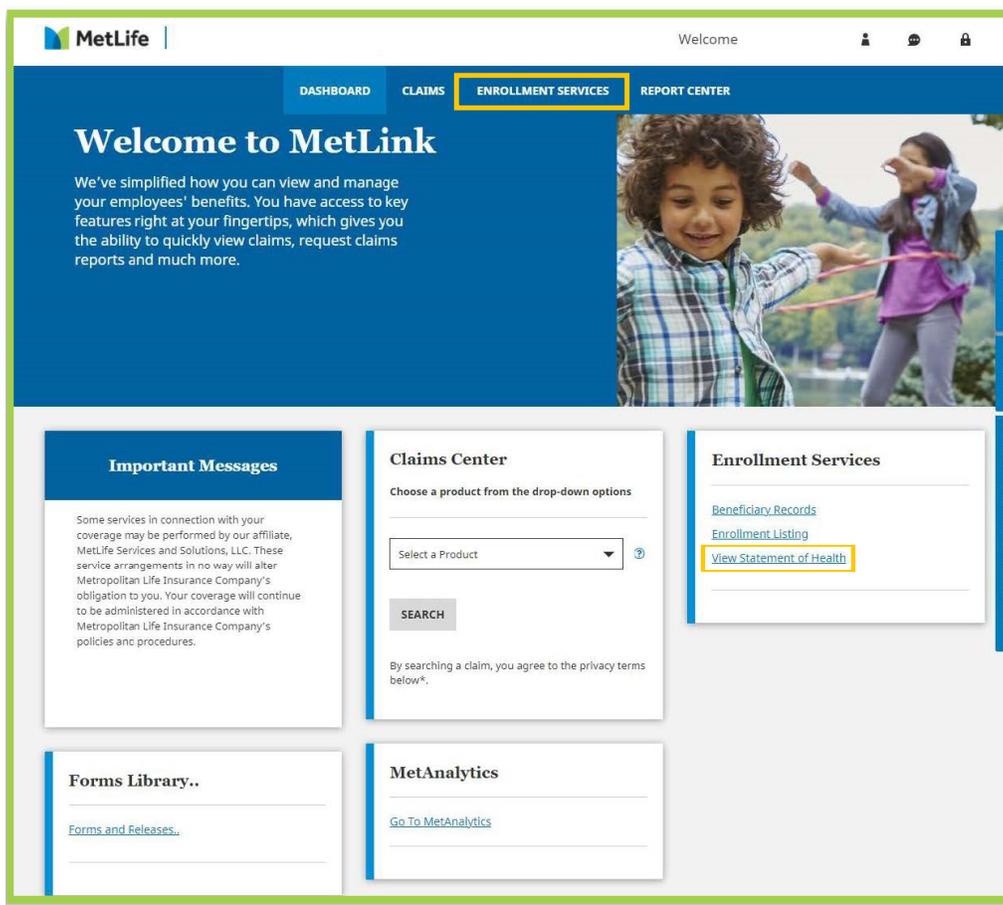
To return to the main Dashboard page from Profile or Support, choose **'Dashboard'** in the navigation menu at the top of the page.

Statement of Health

Statement of Health functionality is available within Enrollment Services, accessible from two links options via the main Dashboard:

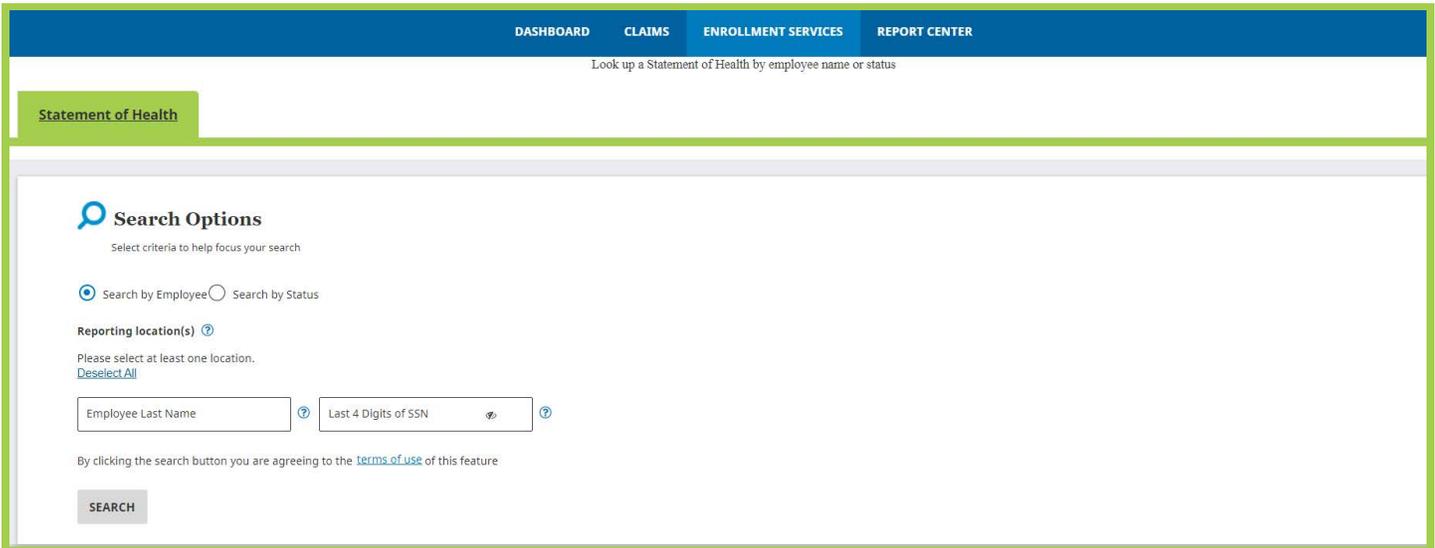
Enrollment Services tab, within the Navigation menu along the top of the page
View Statement of Health link within the **Enrollment Services card**

Either entry point will take the user to the main Statement of Health Inquiry page.



Statement of Health Inquiry Experience

On the main Statement of Health Inquiry page, the user can search for customers based on two search parameters: **employee** or **status**.



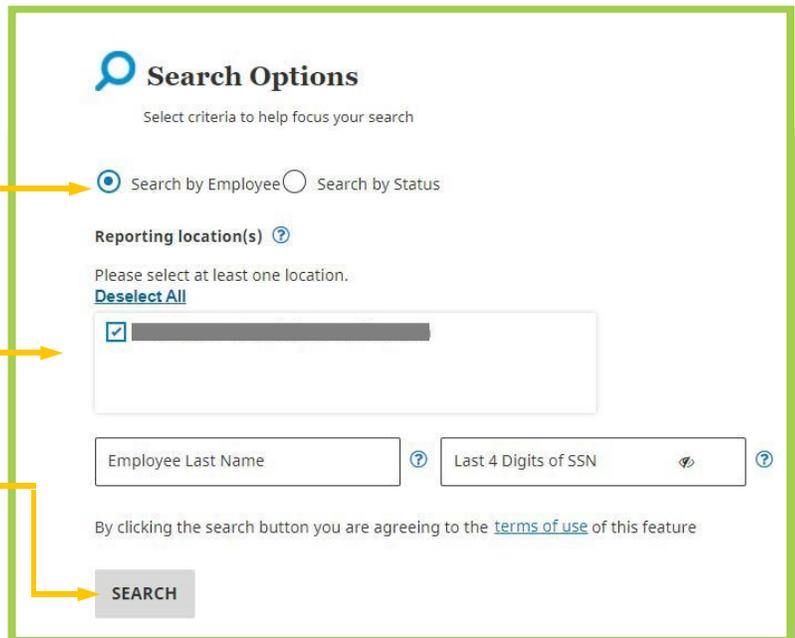
Search by Employee

‘Search by Employee’ allows you to search an individual employee record by entering the Employee’s Last Name and the last 4 Digits of their SSN.

Select the Search by Employee radio button.

By default, all reporting locations are selected. Select at least one reporting location.

To search for an employee, enter the last name and last four digits of SSN. Then, click ‘Search’.



Search by Status

‘Search by Status’ allows you to search your entire organization for SOH requests. You can refine the search using SOH Status (All, Approved, Declined, Pending, Closed, or Other) and Date filters.

Search Options
Select criteria to help focus your search

Search by Employee Search by Status

Reporting location(s) ⓘ
Please select at least one location.
[Deselect All](#)

[Reporting Location]

SOH Status: All | Month: June | Year: 2021

By clicking the search button you are agreeing to the [terms of use](#) of this feature

SEARCH

Click the Search by Status radio button.

By default, all reporting locations are selected. Select at least one reporting location.

Select SOH Status type, month, and year.

Click 'Search'.

Search Results

The Search results will display in a list at the bottom of the page and include up to 10 records. Users may need to scroll down to see the list. If more than 10 records are returned in the search, the user has the option to view 10, 25, or 50 results by clicking the drop-down arrow in the bottom right corner of screen or use the page numbers below the list to navigate between pages. The following information is displayed for each record returned in the search:

- ▶ Employee Name – Last name first
- ▶ Employee SSN - Last 4 digits of Employee SSN with the leading digits masked
- ▶ Applicant Name - Last name first

Search Results
[Export Data to Excel](#) | [Statement of Health User Guide](#) | [Expand All Rows](#) | [Filter page view](#)

Employee Name	Employee SSN	Applicant Name	Relationship ⓘ	Coverage	Status	Status Date	
[REDACTED]	xxx-xx-9788	[REDACTED]	SP	Dependent Life	No Action ⓘ	03/11/2021	+
[REDACTED]	xxx-xx-2530	[REDACTED]	EMP	Optional Life	No Action ⓘ	03/08/2021	+
[REDACTED]	xxx-xx-0580	[REDACTED]	SP	Dependent Life	Approved ⓘ	03/04/2021	+
[REDACTED]	xxx-xx-2943	[REDACTED]	EMP	Optional Life	Approved ⓘ	03/19/2021	+
[REDACTED]	xxx-xx-0934	[REDACTED]	EMP	Optional Life	Approved ⓘ	03/31/2021	+
[REDACTED]	xxx-xx-0934	[REDACTED]	SP	Dependent Life	Approved ⓘ	03/30/2021	+
[REDACTED]	xxx-xx-6158	[REDACTED]	EMP	Optional Life	No Action ⓘ	03/01/2021	+
[REDACTED]	xxx-xx-3606	[REDACTED]	EMP	Optional Life	Approved ⓘ	03/04/2021	+
[REDACTED]	xxx-xx-9180	[REDACTED]	EMP	Optional Life	Approved ⓘ	03/16/2021	+
[REDACTED]	xxx-xx-9180	[REDACTED]	SP	Dependent Life	Approved ⓘ	03/27/2021	+

Total Records : 36

1 2 3 4

Show 10 results per page
 Show 10 results per page
 Show 25 results per page
 Show 50 results per page

- ▶ Relationship to Employee
 - ▶ EMP (Employee)
 - ▶ SP (Spouse)
 - ▶ DP (Domestic Partner)
 - ▶ OTH (Other)
 - ▶ CHLD (Child)
- ▶ Coverage
- ▶ Status of the SOH Application – application status is indicated by the following:
 1. Approved
 2. Declined
 3. Pending
 4. Closed
 5. Other
- ▶ Status Date – date the status was determined

Employee Name	Employee SSN	Applicant Name	Relationship	Coverage	Status	Status Date
[REDACTED]	xxxxxx-9788	[REDACTED]	SP	Dependent Life	No Action	03/11/2021
[REDACTED]	xxxxxx-2530	[REDACTED]	EMP	Optional Life	No Action	03/08/2021
[REDACTED]	xxxxxx-0580	[REDACTED]	SP	Dependent Life	Approved	03/04/2021

Total Records: 3

Sorting Search Results

A

Several of the column headings allow sorting, as indicated by the up/down arrow icon beside the column heading. Sorting in ascending or descending order is available for the following columns:

- ▶ Employee Name
- ▶ Applicant Name
- ▶ Status Date

Filtering Search Results

B

Users can filter the search results list by selecting Filter page view drop-down in the top right corner of the list window. The following filters can be applied:

- ▶ SOH Status
- ▶ Relationship
- ▶ Coverage Requested
- ▶ Status Date

The filters available are: date, enter dates in the From Date and To Date fields. Check the box(es) next to the desired filter, then click Apply.

When a user applies any filters, the drop-down box title changes to Filters Applied. To reset the filters, choose the Filters Applied dropdown box and select Reset filters, then Apply.

Expanding and Collapsing Rows

Users can view detailed search results information by expanding the records. The following information will be displayed:

- Employee ID
- Reporting Location Number
- Amount Subject to Underwriting
- Date Received
- Submission Method

To expand the search results:

1. Select the Expand All Rows link , above the search results, to expand all records returned in the search. When viewing the list in expanded format, the link wording changes to **Collapse All Rows**. When selecting Collapse All Rows, the list returns to the original summary format.
2. To expand a single record, select the plus icon  on the far right of the record to expand it. When viewing the record in the expanded view, the icon changes to a minus sign , which when selected returns the record to the original summary format.

Exporting Data to Excel

Statement of Health inquiry results can be exported as an Excel file. Only the records displayed on the screen will be exported. Select the **Export Data to Excel** link found above the search results. In the pop-up window, select Export to complete the process. You will receive a confirmation message in the pop-up window indicating **'You have successfully exported the report'**. To close the pop-up window, select **Close**.



A tab along the bottom of your browser window should appear with a link to the exported file. Selecting the link will open the exported data in Excel.

MetLife													Date exported:	06/17/2021		
Statement of Health Report																
Search Method	Status															
SOH Status:	All															
As of Date:	March	2021														
*Relationship: EMP=Employee SP=Spouse DP=Domestic Partnes OTH=Other CHLD=Child																
Customer Name	Customer Number	Employee Last Name	Employee First Name	Employee SSN	Applicant Last Name	Applicant First Name	Relationship *	Coverage	Status	Status Date	Reporting Location Number	Amount Subject to Underwriting	Date Received	Employee ID	Submission Method	
				xxx-xx-9788			SP	Dependent Life	No Action	03/11/2021		\$250,000	12/22/2020	xxx-xx-9788	Web	
				xxx-xx-2530			EMP	Optional Life	No Action	03/08/2021		\$99,000	01/05/2021	xxx-xx-2530	Web	
				xxx-xx-0580			SP	Dependent Life	Approved	03/04/2021		\$200,000	01/06/2021	xxx-xx-0580	Web	
				xxx-xx-2943			EMP	Optional Life	Approved	03/19/2021		\$600,000	03/03/2021	xxx-xx-2943	Web	
				xxx-xx-0934			EMP	Optional Life	Approved	03/31/2021		\$450,000	03/11/2021	xxx-xx-0934	Web	