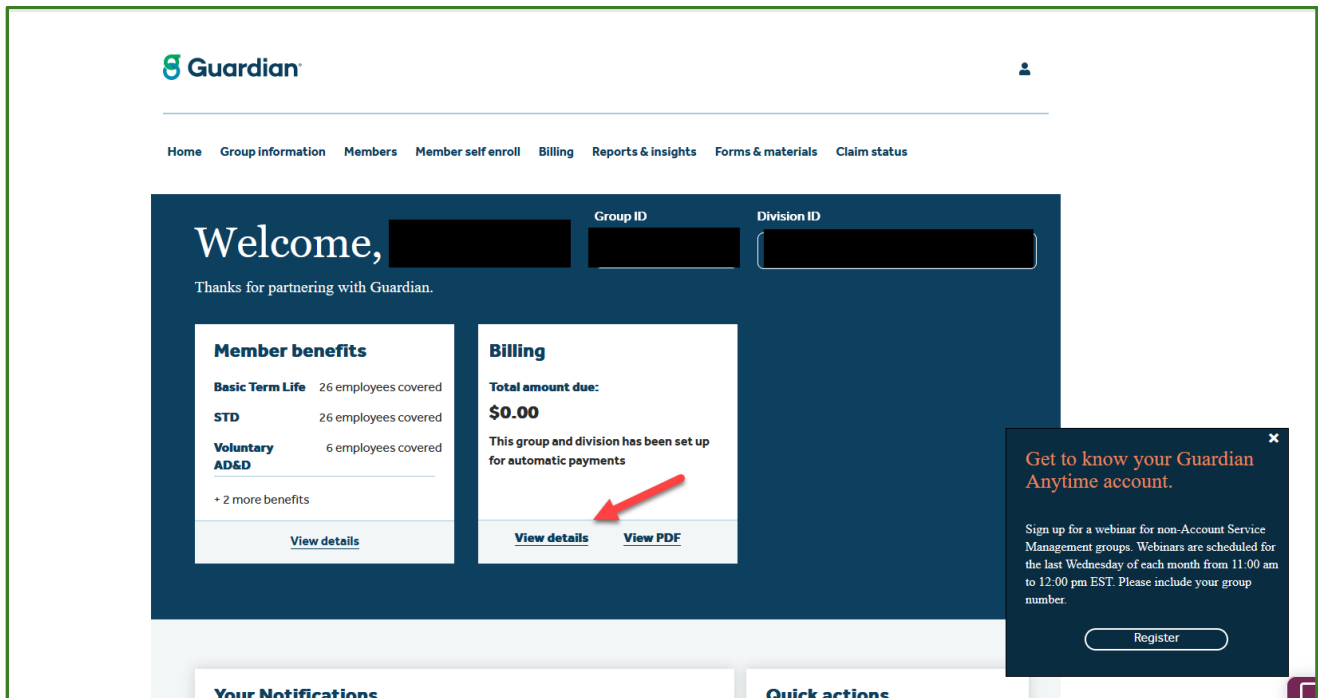


## Pulling Guardian Billing Details reports

Guardian invoices are available in both row-based and column-based formats. While the row-based format may require extensive manual manipulation for audit purposes, the column-based format is easier to work with and requires considerably less adjustment. Below are instructions to access both formats for Group Level and Agency Level access.

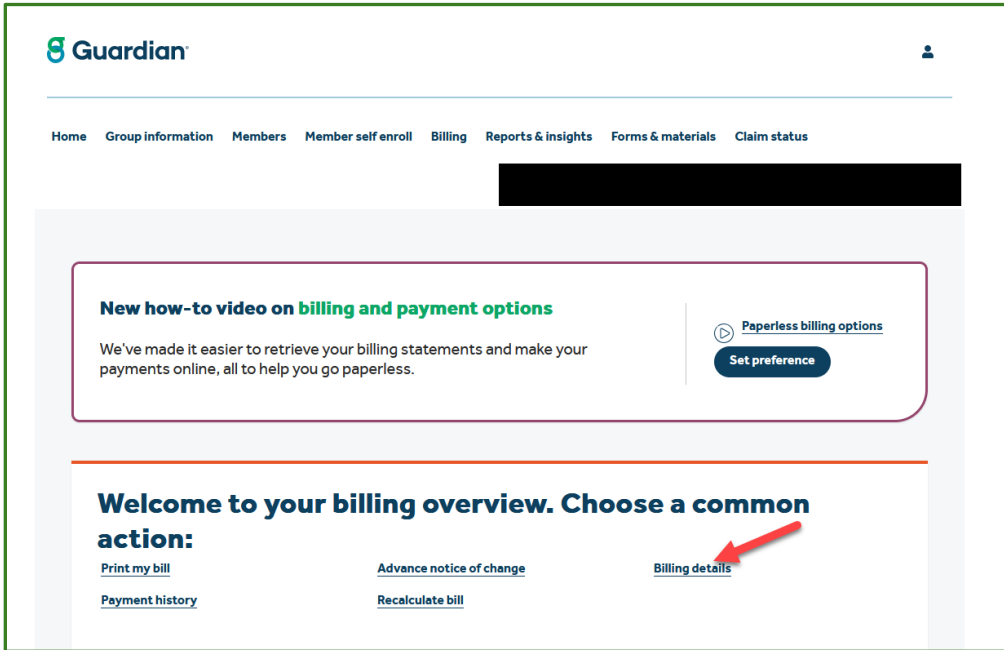
### Group Level Access:

Step 1: Log into your Guardian Portal and Select View Details.

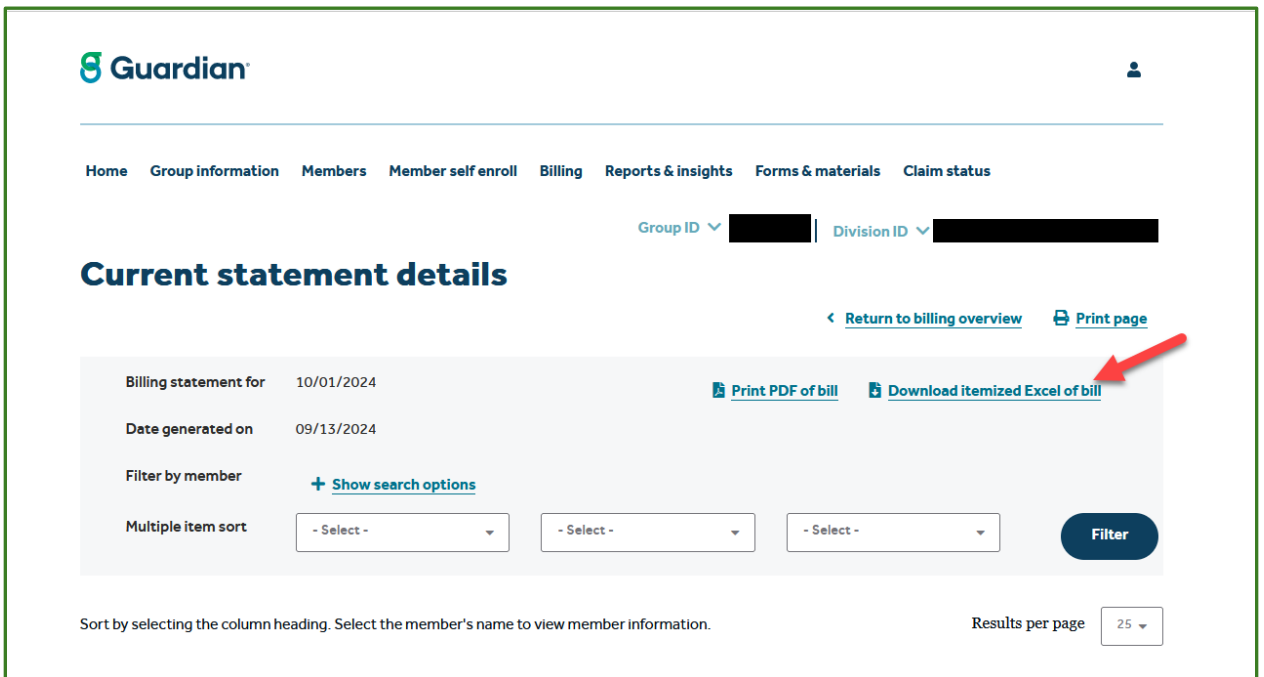


The screenshot shows the Guardian portal dashboard. At the top left is the Guardian logo. A navigation menu includes: Home, Group information, Members, Member self enroll, Billing, Reports & insights, Forms & materials, and Claim status. The main content area features a 'Welcome' message with a user name and fields for Group ID and Division ID. Below this are two main sections: 'Member benefits' and 'Billing'. The 'Member benefits' section lists 'Basic Term Life' (26 employees covered), 'STD' (26 employees covered), and 'Voluntary AD&D' (6 employees covered), with a '+ 2 more benefits' link and a 'View details' button. The 'Billing' section shows 'Total amount due: \$0.00' and a message: 'This group and division has been set up for automatic payments'. Below this message are two buttons: 'View details' and 'View PDF'. A red arrow points to the 'View details' button. On the right side, there is a dark blue notification box with the text: 'Get to know your Guardian Anytime account.' and a 'Register' button. At the bottom, there are sections for 'Your Notifications' and 'Quick actions'.

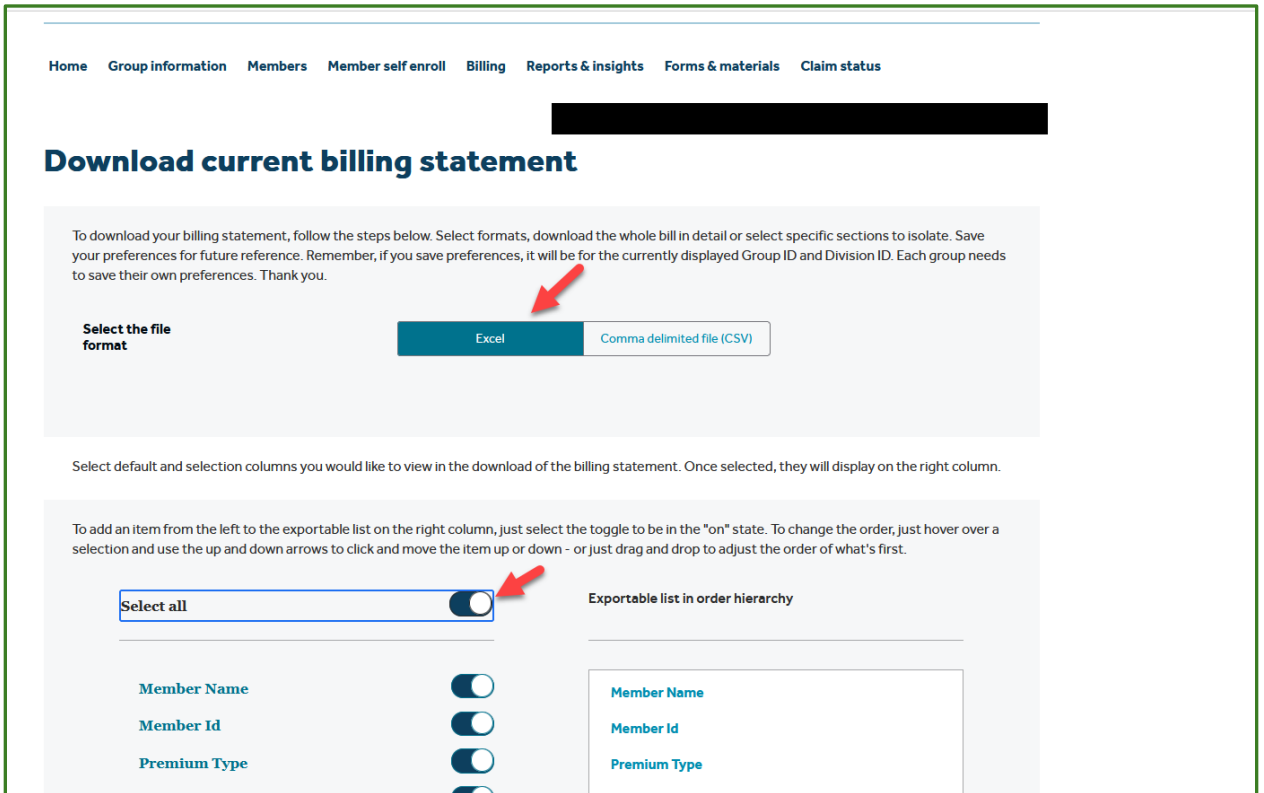
Step 2: Select the link to the Billing Details



Step 3: Select the option to Download Itemized Excel of bill



Step 4: Select the Excel format and then Select All for the items to be included in the report. This will ensure that all items that might be needed are included without having to generate additional reports for the same group and invoice month.



Home Group information Members Member self enroll Billing Reports & insights Forms & materials Claim status

## Download current billing statement

To download your billing statement, follow the steps below. Select formats, download the whole bill in detail or select specific sections to isolate. Save your preferences for future reference. Remember, if you save preferences, it will be for the currently displayed Group ID and Division ID. Each group needs to save their own preferences. Thank you.

Select the file format

Excel Comma delimited file (CSV)

Select default and selection columns you would like to view in the download of the billing statement. Once selected, they will display on the right column.

To add an item from the left to the exportable list on the right column, just select the toggle to be in the "on" state. To change the order, just hover over a selection and use the up and down arrows to click and move the item up or down - or just drag and drop to adjust the order of what's first.

Select all

Member Name

Member Id

Premium Type

Exportable list in order hierarchy

Member Name

Member Id

Premium Type

Step 5: Two formats are available: ROW or COLUMN. Select desired format and then click **DOWNLOAD DATA EXPORT**. The row-based report will list the dependent cost for certain benefits on additional rows as shown in the image below and requires the cost to be sub-totaled. The column-based report has the dependent cost in separate columns.

To display Critical Illness Spouse, Critical Illness Child, Voluntary Term Life Spouse, Voluntary Term Life Child, Voluntary AD&D Spouse, or Voluntary AD&D Child in separate columns, please select the column option.

Choose format for spouse and children coverage: **Row** | **Column** (indicated by a red arrow)

Select up to three sort options.

Sort by: - Select - (dropdown) | Ascending | Descending

- Select - (dropdown) | Ascending | Descending

- Select - (dropdown) | Ascending | Descending

[Save these settings as preferences](#)

[Return to statement details](#) | [Download data export](#) (indicated by a red arrow)

ROW-BASED

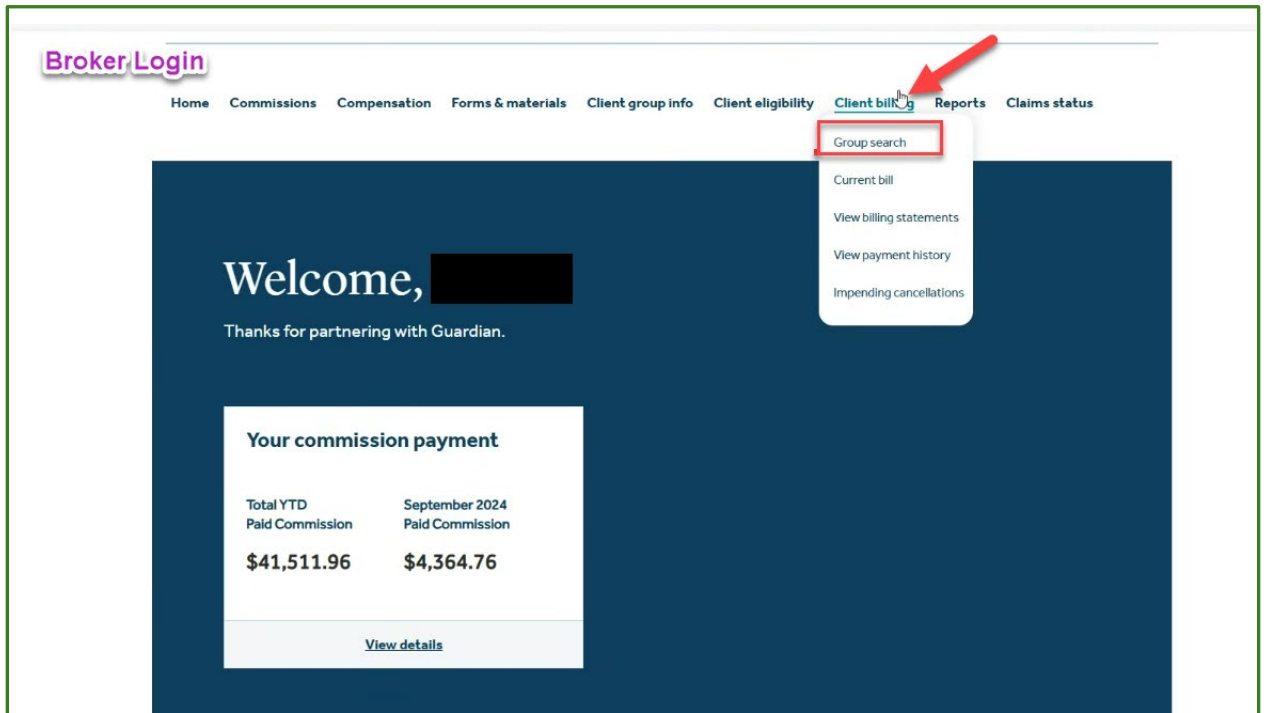
	Member Name	Member Id	Premium Type	Employee ID	Effective Date	Class	Reason	Location	Voluntary AD&D Premium	Voluntary AD&D Volume	Voluntary AD&D Family Indicator	Voluntary Ltd Percent Benefit Premium	Voluntary Ltd Percent Benefit Volume	Voluntary Term Life Premium	Voluntary Term Life Volume	Voluntary Term Life Family Indicator	Total Premium
24			Premium			0002											\$36.90
25			Premium			0001			\$1.10	50000	Emp	\$26.00	5000	\$57.50	50000	Emp	\$98.05
26			Premium			0001											\$16.82
27			Premium			0002											\$24.18
28			Premium			0002			\$6.60	300000	Emp	\$39.10	11500	\$64.80	300000	Emp	\$167.53
29									\$2.20	100000	Sp			\$21.60	100000	Sp	
30									\$0.22	10000	Ch			\$2.62	10000	Ch	
31			Premium			0001											\$12.49
32			Premium			0001			\$2.20	100000	Emp	\$66.25	12500	\$54.90	100000	Emp	\$155.60
33			Premium			0001											\$15.70

COLUMN-BASED

	Voluntary Ad&d Premium	Voluntary Ad&d Spouse Premium	Voluntary Ad&d Child Premium	Voluntary Ad&d Volume	Voluntary Ad&d Spouse Volume	Voluntary Ad&d Child Volume	Voluntary Ltd Percent Benefit Premium	Voluntary Ltd Percent Benefit Volume	Voluntary Term Life Premium	Voluntary Term Life Volume	Voluntary Term Life Spouse Premium	Voluntary Term Life Spouse Volume	Voluntary Term Life Child Premium
92													
69													
85													
08	\$2.20		\$0.22	100000		10000	\$42.40	8000	\$54.90	100000			\$2.62
31													
00							\$53.75	12500					
81													
00							\$79.50	15000					
27	\$4.40	\$2.20	\$0.22	200000	100000	10000	\$8.62	9583	\$12.80	200000	\$6.40	100000	\$2.62

## Agency Level Access

Step 1: Upon logging in, navigate to the Client Billing option and select group search from the drop down.



Step 2: Input the company information into the company search fields and then select Search.

Home Commissions Compensation Forms & materials Client group info Client eligibility Client billing Reports Claims status

## Client Billing

Company Search

**!** Searching for a company with a future effective date? Search by group ID.  
Please Note: If you don't know your group ID on current implementation, please contact your onboarder. If having issues with an active group, please contact customer service at 1-800-627-4200.

Group ID

Division ID (Optional)

OR

Company Name

Type at least four characters

**Search**

Step 3: A list of billing statements will reflect, select the hyperlink to the due date of the bill that you wish to audit.

Group ID

Division ID

## Billing statements

[Print page](#)

Your billing statements are listed below. Please select the due date or division ID to view.

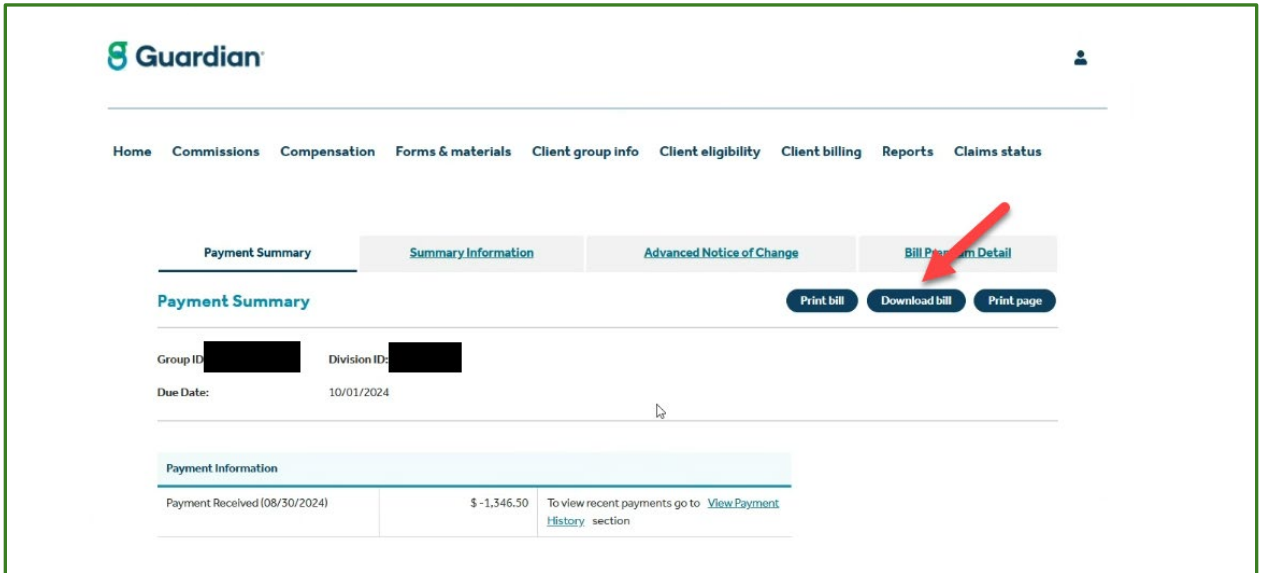
To view billing statements for all divisions you have access to, select "all divisions" in the Division ID selector at the top of the page.

For more information on bill details, click on the due date or the division ID.

Sort by selecting the column heading.

Due Date	Division ID	Division Name	Total	
<a href="#">10/01/2024</a>	<input type="text"/>	<input type="text"/>	\$1,275.81	<b>PDF</b>
<a href="#">09/01/2024</a>	<input type="text"/>	<input type="text"/>	\$1,346.50	<b>PDF</b>

Step 4: You will be directed to the payment summary screen, click DOWNLOAD BILL.



**Guardian**

Home Commissions Compensation Forms & materials Client group info Client eligibility Client billing Reports Claims status

Payment Summary Summary Information Advanced Notice of Change Bill Payment Detail

**Payment Summary** Print bill Download bill Print page

Group ID: [REDACTED] Division ID: [REDACTED]  
Due Date: 10/01/2024

Payment Information		
Payment Received (08/30/2024)	\$ -1,346.50	To view recent payments go to <a href="#">View Payment History</a> section

Step 5: On the download billing statement screen the file type should be set to excel, move all the default columns to the display columns box by selecting the double carats (>>). Choose the export option of Row or Column and then click CONTINUE.

Please note Navigator clients using this report to audit should use the Column option to alleviate possible extensive manipulation prior to auditing.

Select the File Type:  Excel  Comma Delimited File

Select the order of the columns you would like to view the download of the billing statement. Move the column headings from the listing on the left to the right.

Default Columns:

- Basic Term Life Premium
- Basic Term Life Volume
- Vision Premium
- Vision Family Indicator
- Voluntary Ad&d Premium
- Voluntary Ad&d Volume
- Voluntary Ad&d Family Indicator
- Voluntary Term Life Premium
- Voluntary Term Life Volume
- Voluntary Term Life Family Indicator
- Total Premium

Display Columns:

- Member Name
- Premium Type
- Effective Date
- Class
- Reason
- Location
- Dental Family Indicator
- Dental Premium
- Member Id

To display Critical Illness Spouse, Critical Illness Child, Voluntary Term Life Spouse, Voluntary Term Life Child, Voluntary AD&D Spouse, Voluntary AD&D Child in separate columns, please select the Column option.

Critical Illness, Voluntary Term Life and Voluntary AD&D  Row  Column

Download Layout:

Select up to three sort options.

Sort By:

Member Name   Ascending  Descending

Member Id   Ascending  Descending

Select a Column   Ascending  Descending

Save these preferences Cancel Continue

Step 6: The system will bring up the report on the screen, click DOWNLOAD in the lower right corner to download your excel report.

**Guardian**

Home Commissions Compensation Forms & materials Client group info Client eligibility Client billing Reports Claims status

**Download Billing Statement**

Premium Type	Member Name	Member Id	Effective Date	Class	Reason	Location	Basic Term Life Premium	Basic Term Life Volume	Dental Family Indicator	Dental Premium	Vision Family Indicator	Vision Premium	Voluntary Ad&d Premium	Volun Ad&d Volun
Premium							\$11.96	61000	Emp/Sp	\$70.61	Emp/Sp	\$16.44		
Premium							\$16.27	83000	Emp/Ch	\$104.81	Emp	\$9.76		
Premium							\$11.96	61000	Emp	\$34.79	Emp	\$9.76		
Premium							\$13.72	70000						
Premium							\$11.96	61000	Emp	\$34.79	Emp	\$9.76		
Premium									Emp	\$34.79	Emp	\$9.76	\$7.50	25
Premium							\$10.00	51000	Emp/Sp	\$70.61	Emp	\$9.76		
Premium							\$17.64	90000	Fam	\$149.73	Fam	\$26.53		
Premium							\$78.40	400000	Emp	\$34.79	Emp	\$9.76	\$6.00	20
Premium									Emp	\$34.79	Emp	\$9.76	\$4.50	15

Cancel Download