

# Online Administration Web Site Manual



---

# Online Administration Web Site Manual

This plan is administered by **Western Financial Group (Network) Inc.**  
**(Western Financial Group)**

Western Financial Group has prepared this manual to assist you in the day to day administration of your group insurance program using the Online Administration Web Site. It will provide you with the information you need to use the web site's online tools to administer to your group insurance plan.

This manual is for online administration purposes only. The terms and provisions of the group insurance contract will apply to all situations. At Western Financial Group, we can answer any questions you may have about your company's employee benefits program. Please call us at 1-800-665-8990 or refer to the [Contact Us](#) page on the Online Administration Web Site.

---

---

<b>Introduction to Online Administration</b> .....	<b>1</b>
• Account Creation .....	1
• Logging In .....	1
• Navigation .....	3
• Help and Resources .....	5
• Employee Search .....	6
<b>Account, Policy &amp; Employee Information</b> .....	<b>7</b>
• Account Information.....	7
• Policy Information .....	9
• Change Policy Description .....	11
• Employee Information.....	13
<b>Enrolling New Members</b> .....	<b>17</b>
• Enrolling an Employee.....	17
• Enrolling a Dependent.....	27
<b>Updating Employee Information</b> .....	<b>34</b>
• Salary & Employment Information Changes .....	34
• Mass Salary Changes .....	39
• Name Changes.....	44
• Personal Information Changes.....	48
• Dependent Personal Information Changes .....	51
• Green Shield Cards .....	55
<b>Terminations</b> .....	<b>57</b>
• Employee Terminations.....	57
• Mass Employee Terminations .....	61
• Dependent Terminations .....	65
<b>Reinstatements</b> .....	<b>71</b>
• Employee Reinstatements.....	71
• Dependent Reinstatements .....	77
<b>Transfers</b> .....	<b>83</b>
• Employee Transfers .....	83



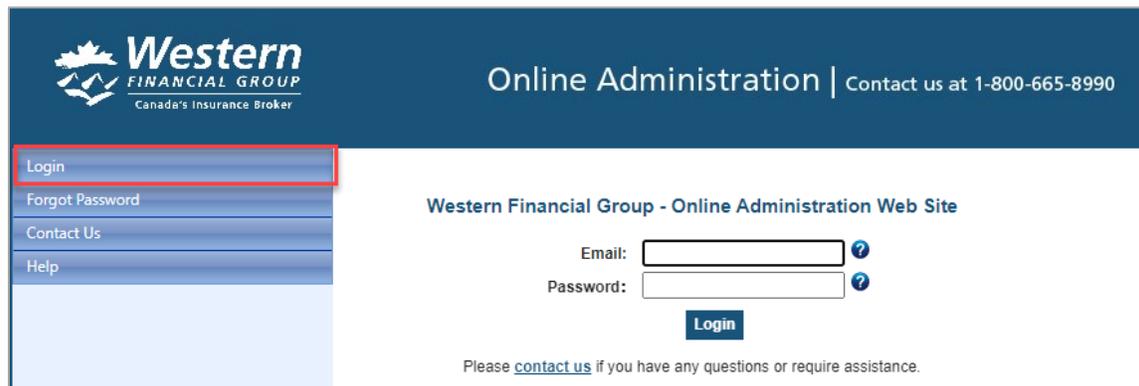
# Introduction to Online Administration

## Account Creation

To gain access to the Online Administration web site you will require a login ID and a temporary password. Please contact your Insurance Advisor at 1-800-665-8990 to request access.

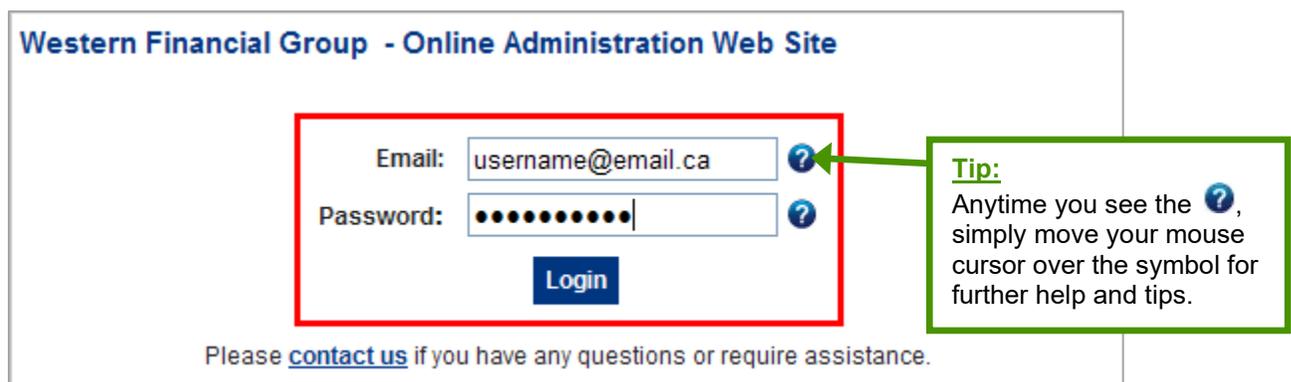
## Logging In

1. Once your Insurance Advisor has created your login ID, you will receive an email that contains your initial password and a link to the Online Administration web site. Once you click on the link, you will be directed to the **Frequently Asked Questions** section of the web site.
2. To begin logging in, click on the **Login** button on the navigation pane at the left side.



The screenshot shows the Western Financial Group Online Administration Web Site. The header includes the company logo and the text "Online Administration | Contact us at 1-800-665-8990". A navigation pane on the left contains links for "Login", "Forgot Password", "Contact Us", and "Help". The main content area features the title "Western Financial Group - Online Administration Web Site" and a login form with fields for "Email:" and "Password:", each with a help icon. A "Login" button is positioned below the fields. At the bottom, a note reads "Please [contact us](#) if you have any questions or require assistance."

3. You will need to enter your full **Email** address and then your initial **Password** which was supplied to you in the email. Once you've done this, click **Login**.



This close-up screenshot focuses on the login form. The "Email:" field contains "username@email.ca" and the "Password:" field is filled with dots. Both fields have a blue question mark icon to their right. A red box highlights the entire login form area. A green tip box on the right contains the text: "Tip: Anytime you see the , simply move your mouse cursor over the symbol for further help and tips." Below the form, the text "Please [contact us](#) if you have any questions or require assistance." is visible.

## Introduction to Online Administration

---

4. Once you log in for the first time, you will need to select a new personalized password. Enter the **Original Password** in the first textbox. Next, enter your new password in the **New Password** and in the **Confirm New Password** textboxes.

**Tip:** The password must be 8 - 16 characters long and must have a mix of upper and lowercase letters, as well as at least one numeral digit. Do not use words or phrases that have personal significance. Try to memorize the password, and avoid writing it down.

**Change your password to continue:**

Original Password: [.....]

New Password: [.....] ?

Confirm New Password: [.....]

**Change Password >>**

Must contain at least 8 characters long, a mix of lowercase and uppercase letters, and at least one numerical digit.

5. You will need to select a personal verification question to help keep your account secure. **Select a question** from the drop-down list. Type the **Answer** in the next textbox (the answer is not case sensitive). Click **Continue**.

**Select a personal verification question and enter an answer:**

Select a question: [First pet's name?]

Answer: [SNOWBALL] ?

**Cancel** **Change Answer >>**

Should not be identical to your login ID or password. Do not use information that others can easily obtain.

6. The Legal Agreement will appear next. After reading the text, to precede click on the **I agree** option and click **Continue**.

nd the privacy associated with taking on and accepting s  
ent.

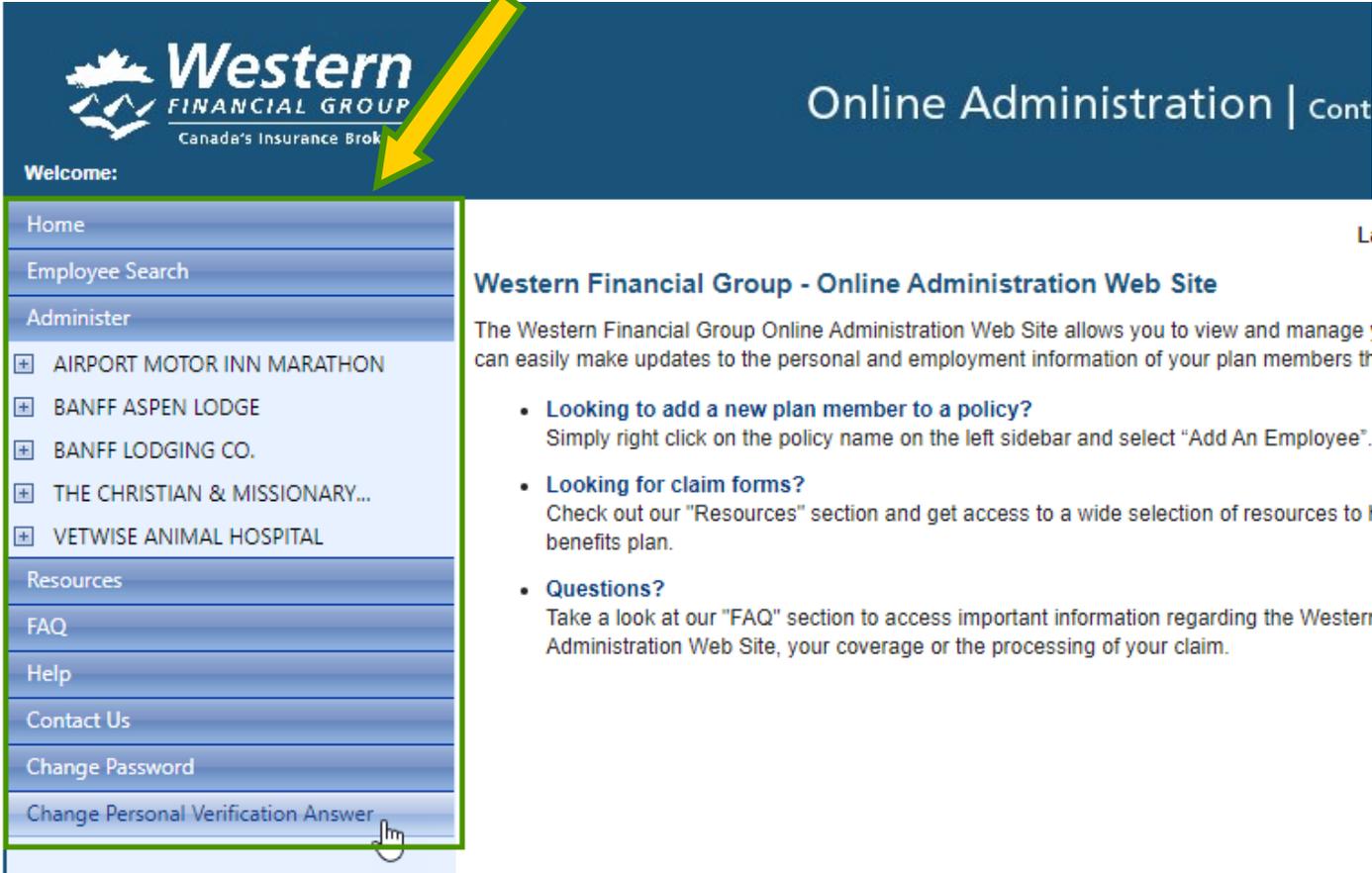
I agree  I don't agree

**Continue >>**

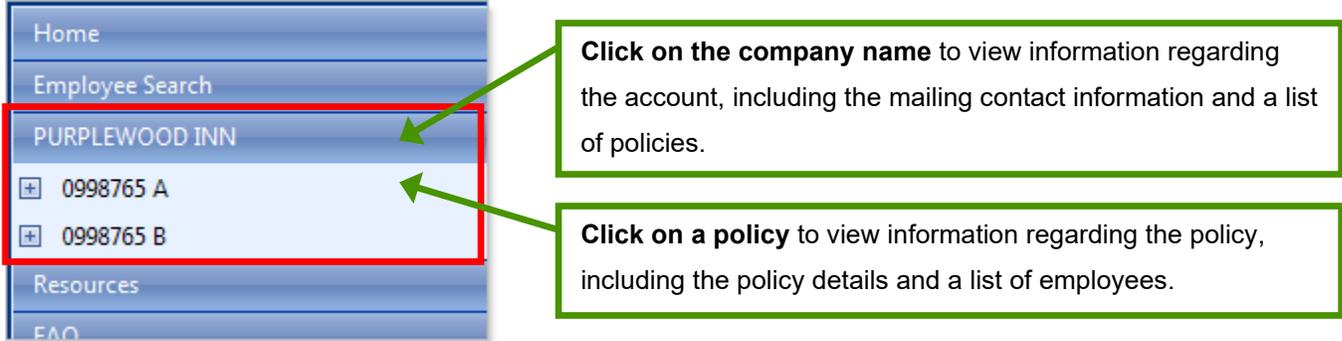
7. You will then be taken to the **Home** page of your Online Administration Web Site account.

### Navigation

Once you have logged in to the Online Administration Web Site, you will be taken to the *Home* page. There will be more buttons available at the left on the *navigation pane*.

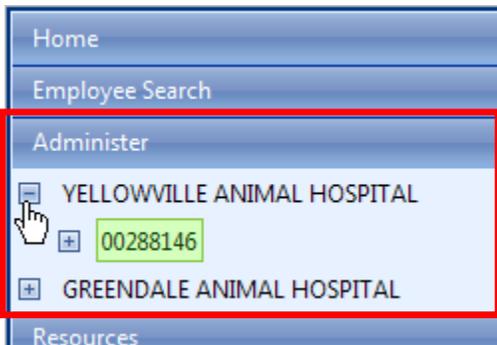


From the navigation pane, you will be able to click on the account/company name or a policy number to view and update information.

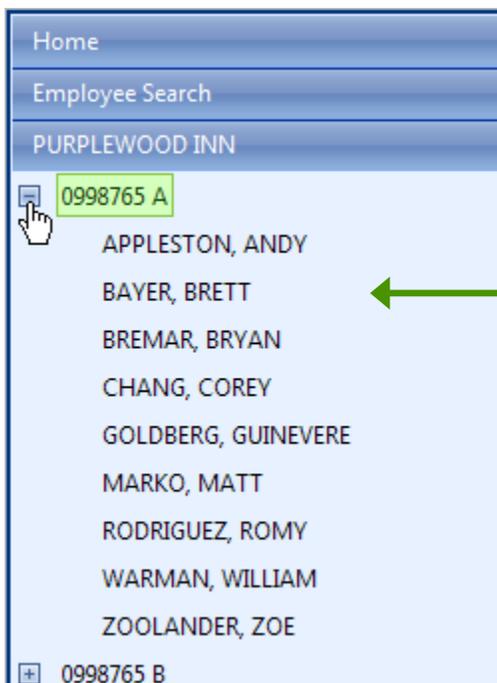


## Introduction to Online Administration

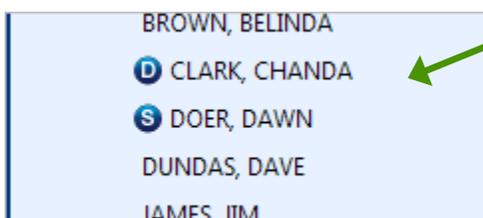
**Note:** If you administer more than one company online, they will both be shown on the navigation pane under the **Administer** heading. You can click on the plus symbol, , in front of a company name to view a list of all active policies for the particular account.



If you click on the plus symbol, , in front of a policy, a list of all the active employees will also be visible in the navigation pane.



**Click on an employee name** to view information regarding the employee, including the employee's personal, enrolment, and employment information. You can also view a list of the dependents, beneficiaries, coverages and premiums, and a history of recent pending changes.



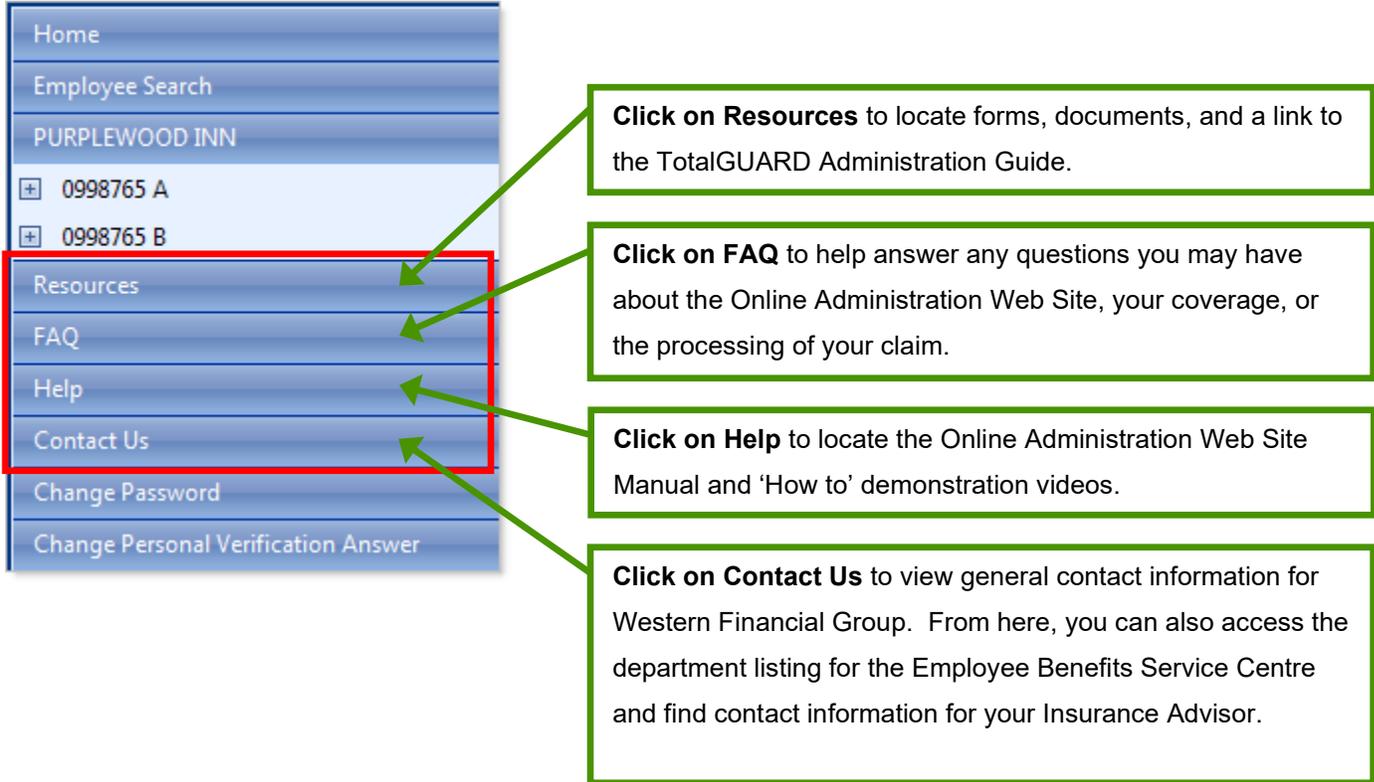
If an employee has a **D** in front of their name, this shows that they are currently on **disability**.

If an employee has an **S** in front of their name, this shows that they are the eldest **surviving dependent** of a deceased employee.

**Note:** You will be unable to edit someone who is on disability or who is a surviving dependent.

## Help and Resources

From the navigation pane, you will be able to quickly access help and resources. This includes the Online Administration Web Site Training Manual, training demo videos, FAQ's, contact information for your Insurance Advisor, and Employee Benefits forms.



The image shows a screenshot of a navigation menu with several items. A red box highlights the 'Resources', 'FAQ', 'Help', and 'Contact Us' items. Four callout boxes with green borders and arrows point to these items, providing instructions on what to click and what information is available.

Home
Employee Search
PURPLEWOOD INN
+ 0998765 A
+ 0998765 B
<b>Resources</b>
<b>FAQ</b>
<b>Help</b>
<b>Contact Us</b>
Change Password
Change Personal Verification Answer

**Click on Resources** to locate forms, documents, and a link to the TotalGUARD Administration Guide.

**Click on FAQ** to help answer any questions you may have about the Online Administration Web Site, your coverage, or the processing of your claim.

**Click on Help** to locate the Online Administration Web Site Manual and 'How to' demonstration videos.

**Click on Contact Us** to view general contact information for Western Financial Group. From here, you can also access the department listing for the Employee Benefits Service Centre and find contact information for your Insurance Advisor.

**Note:** If you experience any problems using the Online Administration site, please contact your Insurance Advisor at 1-800-665-8990 for assistance.

### Employee Search

You can easily locate an employee using the **Employee Search** option.

1. Click on the **Employee Search** button from the navigation pane.



2. You may search for an employee by either their name or their ID number.
  - To **Search by Employee Name**, enter the **First Name** and/or the **Last Name** in the first two textboxes. You may just enter the first few characters to list all employees that match the criteria.
  - To **Search by ID**, enter the employee's *Certificate ID* number or *Green Shield ID* number in the **ID** textbox. You must enter the full number as this search will only locate exact matches.
3. Click on **Search** to display the result below. Both active and inactive employees will be located in the search.

#### Employee Search

You can search for an employee either by Employee Name or by ID. Enter in the information and then click the "Search" button. The search results will display below.

Search by Employee Name

First Name:  and / or Last Name:

Search by ID

ID:

#### Search Results

Name	ID #	Date of Birth	Enrollment Date	Termination Date		
BENJAMIN, BRADLEY	555123411	Aug 15, 1983	Mar 01, 2007	Mar 01, 2008	<a href="#">View</a>	<a href="#">Reinstate</a>
BREMAR, BRYAN	909777	Dec 02, 1950	Mar 01, 2007	-	<a href="#">View</a>	<a href="#">Edit</a>
BROWN, BRENDA	909333	May 18, 1968	Mar 01, 2007	-	<a href="#">View</a>	<a href="#">Edit</a>

From the **Search Results**, you can quickly **View** or **Edit** an active employee's information using the links on the right. For terminated employees, you will only be able to **View** or **Reinstate** the employee.

# Account, Policy & Employee Information

---

## Account Information

Click on the account/company name from the navigation pane to view the [Account Information](#) page. You will be able to view information regarding the account, including the mailing contact information and a list of policies.



- Click on the **Policies** tab to view a list of all policies under this account.

To the right of a policy, you can click on **View** to view the [Policy Information](#) page or you can click on **Edit** to change the policy's description or add a new employee.



**PURPLEWOOD INN**

Listed below is information regarding this account. Click on "Contact Info" to view the contact information for this account. Click on "Policies" to view a list of policies for this account.

Navigation tabs: Contact Info | Policies

Policy Number	Description	# Employees	Effective Date	Customer Service Rep		
0998765 A		9	Mar 01, 2007	BREANNA CARELS	<a href="#">View</a>	<a href="#">Edit</a>
0998765 B		9	Nov 01, 2009	BREANNA CARELS	<a href="#">View</a>	<a href="#">Edit</a>

A green arrow points from the text above to the 'Policies' tab and the table below.

## Account, Policy & Employee Information

---

- Click on the **Contact Info** tab to view the mailing contact information for this account.

**Note:** The information displayed (including phone, email and mailing address) will be for the person we have listed in our records as the *mailing* contact on the account.

### PURPLEWOOD INN

Listed below is information regarding this account. Click on "Contact Info" to view the contact information for this account. Click on "Policies" to view a list of policies for this account.

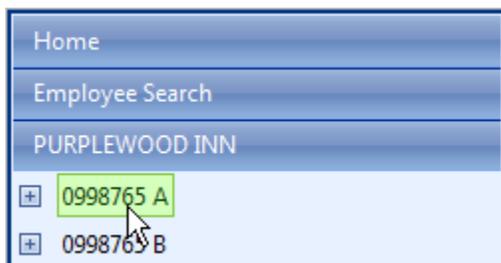
Contact Info

Policies

<b>External Name:</b>	PURPLEWOOD INN
<b>Legal Name:</b>	PURPLEWOOD INN LTD.
<b>Contact Person:</b>	Ira Ireland
<b>Contact Title:</b>	Office Manager
<b>Phone:</b>	(204) 942-2555 ext 555
<b>Fax:</b>	(204) 975-1624
<b>Email:</b>	IIRELAND@PURPLEWOOD.CA
<b>Box\Suite:</b>	
<b>Address:</b>	777 PORTAGE AVE
<b>City:</b>	WINNIPEG
<b>Province:</b>	MB
<b>Postal Code:</b>	R3G 0N3

## Policy Information

Click on the policy number from the navigation pane, or click on the **View** link beside the policy number on the **Policies** tab, to view the **Policy Information** page. You will be able to view information regarding the policy, including the policy details and a list of employees.



- You can add an employee to this policy or give the policy a personalized description by selecting the required option from the **I would like to** drop-down list at the top right.
- Click on the **Employees** tab to view a list of all employees under this account.

By default, only active employees will appear in the list. You can view the inactive employees by selecting the **Inactive Employees** option at the top of the tab.

**Policy 0998765 A** I would like to --

Listed below is information regarding this policy. Click on "Details" to view this policy's information. Click on "Employees" to view a list of employees in this policy. You can add an employee to this policy or change this policy's description by selecting from the "I would like to" drop down list above.

Details **Employees** History

[View Policy Summary of Coverage](#)

*(Note: You will need Adobe Reader to view and print the above links. If you do not have Adobe Reader, you can download it free by clicking [here](#).)*

Show:  Active Employees  Inactive Employees

Name	ID #	Date of Birth	Enrollment Date		
APPLESTON, ANDY	555123422	Nov 01, 1974	Mar 01, 2007	<a href="#">View</a>	<a href="#">Edit</a>
BAYER, BRETT	909333	May 18, 1968	Mar 01, 2007	<a href="#">View</a>	<a href="#">Edit</a>
BREMAR, BRYAN	909777	Sep 20, 1950	Mar 01, 2007	<a href="#">View</a>	<a href="#">Edit</a>
CHANG, COREY	555123444	Aug 01, 1960	Mar 01, 2007	<a href="#">View</a>	<a href="#">Edit</a>
GOLDBERG, GUINEVERE	555123455	Jun 17, 1982	Mar 01, 2007	<a href="#">View</a>	<a href="#">Edit</a>

To the right of an employee, you can click on **View** to view the **Employee Information** page. You can also click on **Edit** to update the employee's name, personal information, or salary/employment information, as well as, manage dependents or terminate the employee. **Note:** You will only be able to edit active employees.

## Account, Policy & Employee Information

- Click on the **Details** tab to view basic information for this policy including the name of your Insurance Advisor and a link to their contact information.

**Policy 0998765 A** I would like to --

Listed below is information regarding this policy. Click on "Details" to view this policy's information. Click on "Employees" to view a list of employees in this policy. You can add an employee to this policy or change this policy's description by selecting from the "I would like to" drop down list above.

**Details** | Employees | History

**Policy Number:** 0998765 A  
**Policy Description:**  
**Effective Date:** Mar 01, 2007  
**Number of Employees:** 9  
**Western Life Number:** 59000  
**Green Shield Number:** 0  
**Customer Service Rep:** BREANNA CARELS [Contact your Customer Service Representative](#)

- Click on the **History** tab to view a record of changes made to the policy and/or employees via the Online Administration web site. The tab will default to the **Pending** option to only show the records that are still pending. Click on the **Completed/Cancelled** option to see other past changes.

**Policy 0998765 A** I would like to --

Listed below is information regarding this policy. Click on "Details" to view this policy's information. Click on "Employees" to view a list of employees in this policy. You can add an employee to this policy or change this policy's description by selecting from the "I would like to" drop down list above.

**Details** | **Employees** | History

Show:  Pending  Completed/Cancelled

Transaction Type	Reason	Effective Date	Completed Date	Status	
• Manage Dependents (ROMY RODRIGUEZ)		Oct 18, 2012	Oct 18, 2012	Completed	<a href="#">Details</a>
-Dependent Personal Change (MARIA RODRIGUEZ)		Oct 18, 2012	Oct 18, 2012	Completed	
• Request GreenShield Cards (COREY CHANG)		Oct 12, 2012	Oct 12, 2012	Completed	<a href="#">Details</a>
• Request GreenShield Cards (ROMY RODRIGUEZ)		Oct 12, 2012	Oct 12, 2012	Completed	<a href="#">Details</a>
• Request GreenShield Cards (WILLIAM WARMAN)		Oct 12, 2012	Oct 12, 2012	Completed	<a href="#">Details</a>

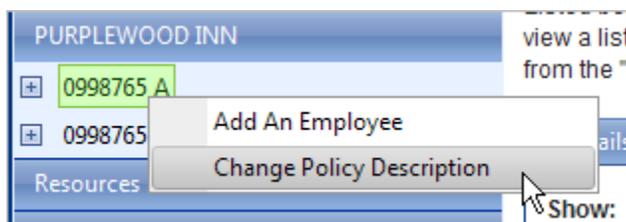
## Change Policy Description

You can give a policy your own personalized description. This description will appear in the navigation pane instead of the policy number. The policy number will still appear at the top of the **Policy Information** page for reference.

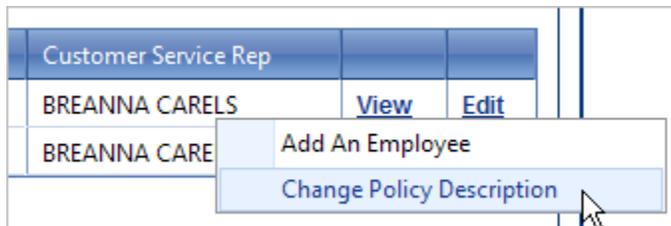
**Note:** You can change the policy description at any time but if you would like to completely delete the description and go back to having only the policy numbers appear in the navigation pane, you will need to contact your Insurance Advisor at 1-800-665-8990 for assistance

1. To change the policy description, there are 3 different ways to begin:

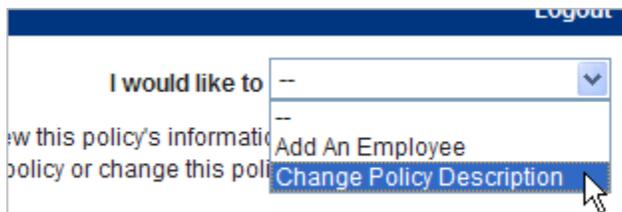
- Right-click on the Policy number/description from the navigation pane and select **Change Policy Description** from the pop-up menu.



- While viewing the **Policies** tab from the **Account Information** page, locate the policy from the list and click on **Edit** to the right. Select **Change Policy Description** from the pop-up menu.



- While viewing the **Policy Information** page, at the top right, click on the down arrow from the **I would like to** drop-down list and select **Change Policy Description**.



## Account, Policy & Employee Information

- You will be taken to the **Edit Policy Description** screen. Type the new policy description in the textbox and click **Submit Change>>**.

### Edit Policy Description - 0998765 A

You can change the description of this policy by entering in a new description under "New Information". Click the "Submit Change" button and the policy description will be updated throughout the Online Administration Web Site.

	Original Information	New Information
Policy Description:	(no value entered)	RESTAURANT STAFF

[Cancel](#) [Submit Change >>](#)

- Review the **New Information** and click on **Confirm** to complete the change. You may also click on **Edit** to go back to the previous edit screen if you need to make any changes.

### Policy Description Edit Confirmation- 0998765 A

Please confirm that the information below is correct. If any changes are required click on the "Edit" button. Click on the "Confirm" button to submit the request.

	Original Information	New Information
Policy Description:	(no value entered)	RESTAURANT STAFF

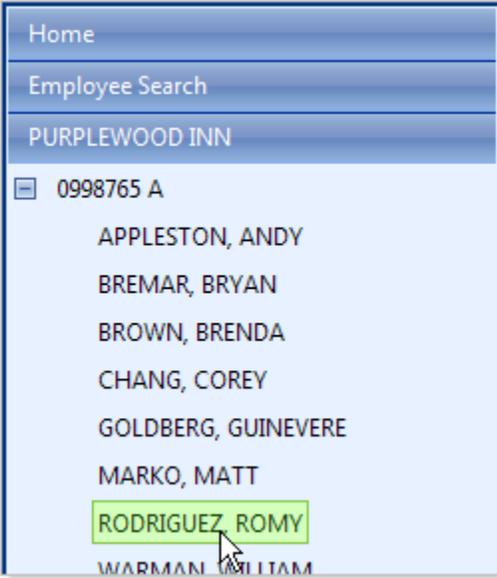
[Cancel](#) [Edit](#) [Confirm >>](#)

The new policy description will now appear in the navigation pane. It will also appear at the top of the **Policy Information** page along with the policy number in brackets.

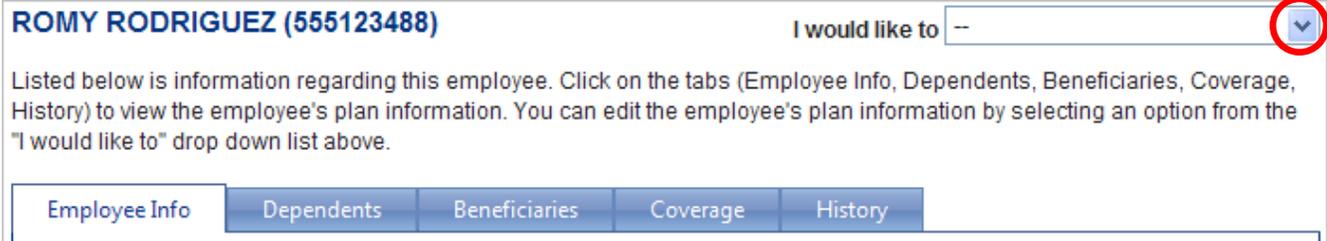
Home	<h3>Policy RESTAURANT STAFF (0998765 A)</h3> <p>Listed below is information regarding this policy. Click view a list of employees in this policy. You can add an from the "I would like to" drop down list above.</p> <p><a href="#">Details</a> <a href="#">Employees</a> <a href="#">History</a></p>
Employee Search	
PURPLEWOOD INN	
<a href="#">RESTAURANT STAFF</a>	
<a href="#">HOUSEKEEPING STAFF</a>	
Resources	

### Employee Information

Click on an employee from the navigation pane, or click on the **View** link beside the employee on the **Employees** tab, to view the **Employee Information** page. You will be able to view information regarding the employee, including the employee's personal, enrolment, and employment information. You can also view a list of the dependents, beneficiaries, coverages and premiums, and a history of changes made online.



- You can update the employee's information by selecting the required option from the **I would like to** drop-down list at the top right. From here, you can update the employee's name, personal information, and salary/employment information, as well as, manage dependents, and terminate the employee.



## Account, Policy & Employee Information

- Click on the **Employee Info** tab to view information for the employee including personal information, enrolment information, and employment information.

**ROMY RODRIGUEZ (555123488)** I would like to

Listed below is information regarding this employee. Click on the tabs (Employee Info, Dependents, Beneficiaries, Coverage, History) to view the employee's plan information. You can edit the employee's plan information by selecting an option from the "I would like to" drop down list above.

Employee Info	Dependents	Beneficiaries	Coverage	History
<b>Personal Info</b>		<b>Employment Info</b>		
<b>First Name:</b>	ROMY	<b>Prov of Residence:</b>	Alberta	
<b>Last Name:</b>	RODRIGUEZ	<b>Occupation:</b>	MANAGER	
<b>Middle Initial:</b>	RAIN	<b>Date Hired:</b>	Jan 15, 2007	
<b>Gender:</b>	Female	<b>Income:</b>	\$65,000.00 Annual	
<b>Birth Date:</b>	Apr 19, 1976	<b>Hours Worked per Week:</b>	40	
		<b>Months Worked per Year:</b>	12	
<b>Enrollment Info</b>				
<b>Family Status:</b>	Family			
<b>Employee Status:</b>	Employee			
<b>Employee Class:</b>	Salary Employees			
<b>ID Number:</b>	555123488			
<b>Enrollment Date:</b>	Apr 15, 2007			
<b>Coordination of Benefits:</b>	Spouse has Family Both			
<b>Previously Underwritten:</b>	Yes			

- Click on the **Dependents** tab to view a list of all active dependents for this employee. By default, only active dependents will appear in the list. You can view any inactive dependents by selecting the **Inactive Dependents** option at the top of the tab.

**ROMY RODRIGUEZ (555123488)** I would like to --

Listed below is information regarding this employee. Click on the tabs (Employee Info, Dependents, Beneficiaries, Coverage, History) to view the employee's plan information. You can edit the employee's plan information by selecting an option from the "I would like to" drop down list above.

Employee Info   **Dependents**   Beneficiaries   Coverage   History

Show:  Active Dependents    Inactive Dependents

Name	Gender	Relationship	Green Shield #	Date of Birth	Enrollment Date
RODRIGUEZ, ROMEO	Male	Spouse	255995701	Oct 06, 1972	Mar 01, 2007
RODRIGUEZ, MARIA	Female	Child	255995702	Apr 05, 1994	Mar 01, 2007
RODRIGUEZ, SAM	Male	Child	255995703	Aug 20, 1996	Mar 01, 2007

- Click on the **Beneficiaries** tab to view a list of all current beneficiaries for this employee.

**ROMY RODRIGUEZ (555123488)** I would like to --

Listed below is information regarding this employee. Click on the tabs (Employee Info, Dependents, Beneficiaries, Coverage, History) to view the employee's plan information. You can edit the employee's plan information by selecting an option from the "I would like to" drop down list above.

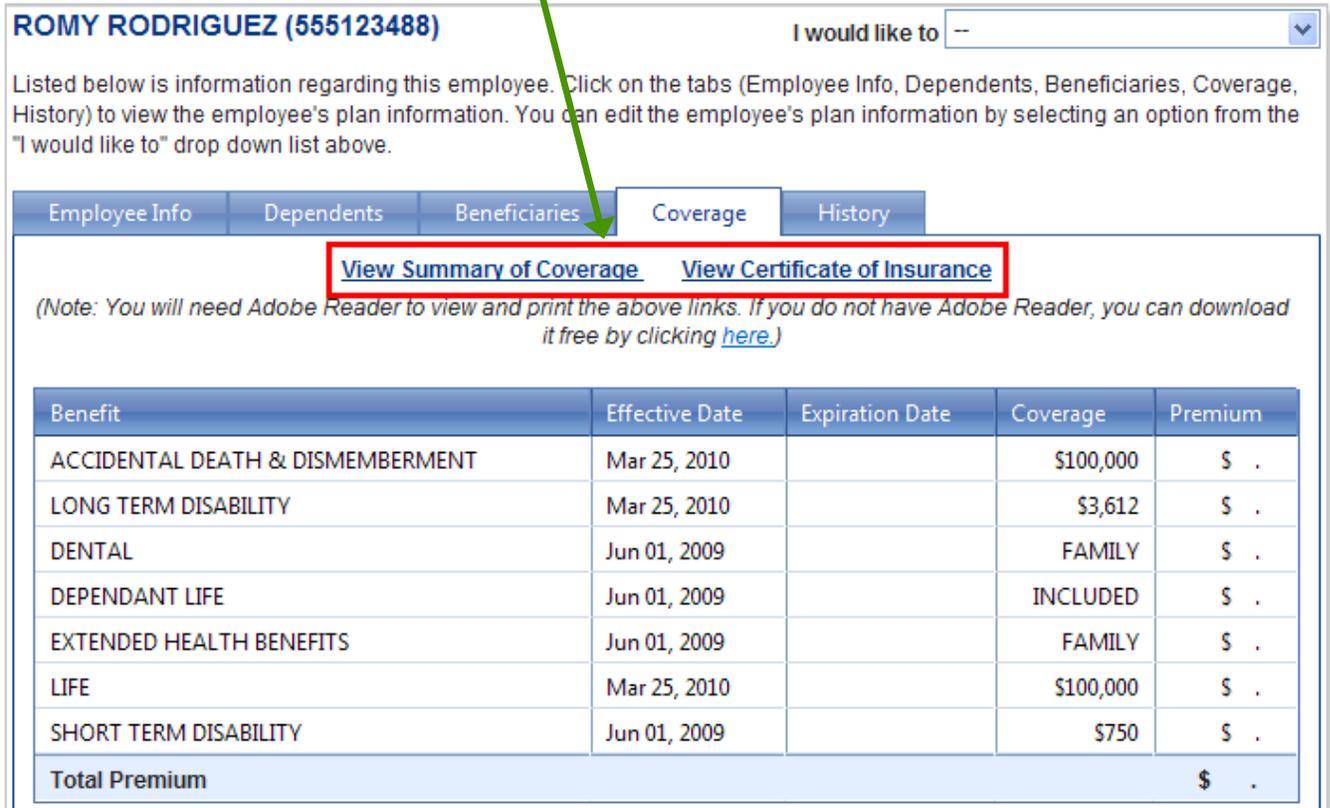
Employee Info   Dependents   **Beneficiaries**   Coverage   History

Name	Relationship	Allocation %	Trustee	Trustee Relationship	Effective Date
RODRIGUEZ, ROMEO	SPOUSE	70	N/A	N/A	Dec 08, 2008
MAINE, MARY	MOTHER	30	N/A	N/A	Dec 08, 2008

## Account, Policy & Employee Information

- Click on the **Coverage** tab to view a list of all current benefits, including coverages and premiums, for this employee.

From this tab, you can view the employee's **Summary of Coverage** report or the employee's **Certificate of Insurance** by clicking on the corresponding link at the top of the tab.



**ROMY RODRIGUEZ (555123488)** I would like to --

Listed below is information regarding this employee. Click on the tabs (Employee Info, Dependents, Beneficiaries, Coverage, History) to view the employee's plan information. You can edit the employee's plan information by selecting an option from the "I would like to" drop down list above.

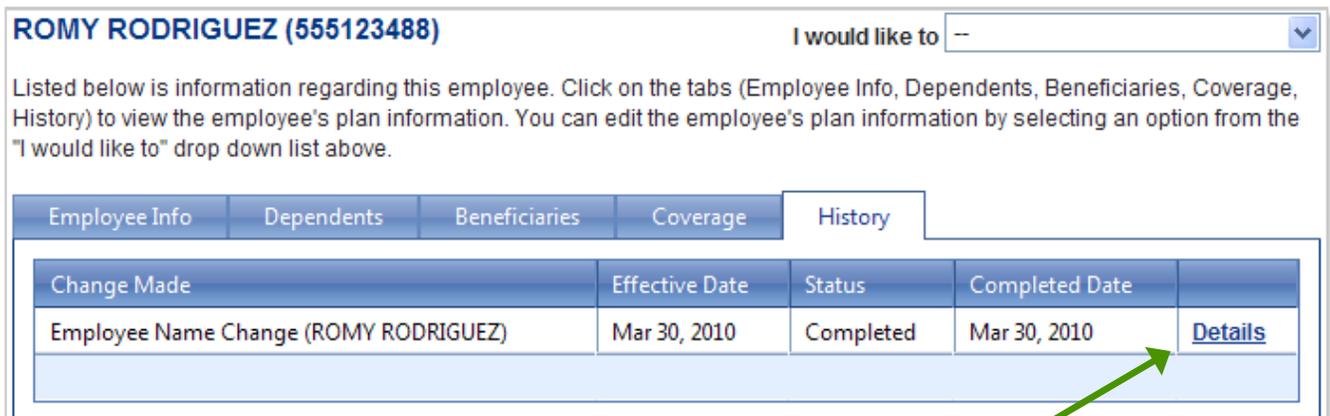
Employee Info Dependents Beneficiaries **Coverage** History

[View Summary of Coverage](#) [View Certificate of Insurance](#)

(Note: You will need Adobe Reader to view and print the above links. If you do not have Adobe Reader, you can download it free by clicking [here](#).)

Benefit	Effective Date	Expiration Date	Coverage	Premium
ACCIDENTAL DEATH & DISMEMBERMENT	Mar 25, 2010		\$100,000	\$ .
LONG TERM DISABILITY	Mar 25, 2010		\$3,612	\$ .
DENTAL	Jun 01, 2009		FAMILY	\$ .
DEPENDANT LIFE	Jun 01, 2009		INCLUDED	\$ .
EXTENDED HEALTH BENEFITS	Jun 01, 2009		FAMILY	\$ .
LIFE	Mar 25, 2010		\$100,000	\$ .
SHORT TERM DISABILITY	Jun 01, 2009		\$750	\$ .
<b>Total Premium</b>				<b>\$ .</b>

- Click on the **History** tab to view a list of all changes made for this employee using the Online Administration Web Site.



**ROMY RODRIGUEZ (555123488)** I would like to --

Listed below is information regarding this employee. Click on the tabs (Employee Info, Dependents, Beneficiaries, Coverage, History) to view the employee's plan information. You can edit the employee's plan information by selecting an option from the "I would like to" drop down list above.

Employee Info Dependents Beneficiaries Coverage **History**

Change Made	Effective Date	Status	Completed Date	
Employee Name Change (ROMY RODRIGUEZ)	Mar 30, 2010	Completed	Mar 30, 2010	<a href="#">Details</a>

If you click on the **Details** link, you will be able to see more information about the change.

# Enrolling New Members

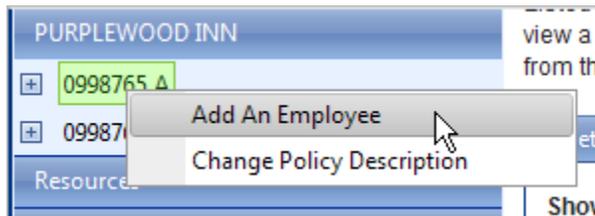
## Enrolling an Employee

New employees who are eligible for employee benefits may be enrolled directly online. For online enrolment, you will need to provide the employee's personal, employment, and coverage information, as well as beneficiary information, and any dependent information.

For a definition of eligible employees and information regarding the effective date of insurance, please refer to the [Enrolling New Members](#) section of your [Administration Guide](#):

1. To add an employee to a policy, there are 3 different ways to begin:

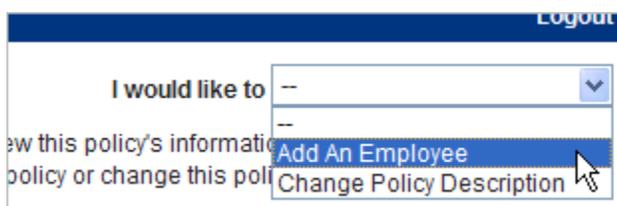
- Right-click on the policy number/description from the navigation pane and select **Add An Employee**.



- Go to the **Policies** tab on the **Account Information** page, locate the policy from the list and click on **Edit** to the right. Select **Add An Employee**.



- At the top right of the **Policy Information** page, click on the down arrow from the **I would like to** drop-down list and select **Add An Employee**.



## Enrolling New Members

---

- You will then be taken to the **Add An Employee** screen where you will need to complete the employee details, add any dependents as required, and add beneficiaries.

From the **Details** tab, complete the employee's personal information:

- Enter the **First Name**.
- Enter the **Last Name**.
- Enter a **Middle Name** or **Initial** (optional).
- Select the **Gender**.
- Enter the **Date of Birth** in YYYY/MM/DD format.

The screenshot shows a web form with three tabs: 'Details', 'Dependents', and 'Beneficiaries'. The 'Details' tab is active. Below the tabs is the section 'Employee Personal Info'. The form contains the following fields and values:

- First Name: MINDY
- Last Name: MATHESON
- Middle Name: MARIA (optional)
- Gender:  Male  Female
- Date of Birth: 1980 / 06 / 15 (yyyy/mm/dd)

A red rectangular box highlights the input fields for First Name, Last Name, Middle Name, Gender, and Date of Birth.

- Below the personal information, complete the employment information:
  - Enter the **Date Hired** in YYYY/MM/DD format. This will be the first day of full-time employment.
  - Select the **Province of Residence** where the employee permanently resides (this may be different than their employment province).
  - Enter an **Occupation**.
  - Enter the **Income** amount and then select the income period from the drop-down list.
  - Enter the **Hours Worked per Week**. Employee are eligible if they are working a minimum number hours per week as stipulated in your Collective Agreement. Enter the average number of hours employee works per week.
  - Enter the **Months Worked per Year**. Enter the number of months per year employee will work.  
Note: employee must work minimum of 9 months per year to qualify for benefits.

Employment Info	
Date Hired:	2010 / 12 / 01 (yyyy/mm/dd) ?
Province of Residence:	Manitoba
Occupation:	CLERK
Income:	12.5 Hourly
Hours Worked per Week:	40.0 ?
Months Worked per Year:	12 ?

4. Next, complete the coverage information:

- a. If the employees on the policy are divided into different classes (e.g. 'A group' employees, 'B group' employees, etc.), select the **Employee Class** from the drop-down list.  
**Note:** If the policy does not contain separate employee classes, this field will not be visible.
- b. Select the **Employee Status** from the drop-down list.
- c. Select the **Family Status** from the drop-down list. ? If Partial coverage is selected, employee will not be covered for Health/Dental coverage. Plan member must be covered with similar coverage on spouse's plan to select Partial coverage.
- d. If you selected **Family** or **Partial** as the **Family Status** above, from the **Coordination of Benefits** drop-down list select if the spouse has existing **Dental**, **Health**, or **Both** coverage and whether it is **Single** or **Family** coverage. If the spouse has neither dental nor health coverage then leave this field blank. ? Indicate whether spouse has coverage elsewhere, either individually or full family coverage.

Coverage Info	
Employee Class:	Hourly Employees
Employee Status:	Employee
Family Status:	Family ?
Coordination of Benefits:	Spouse has Single Both ?

5. **Note:** Don't click the **Next>>** button at the bottom of the page just yet. Scroll back up to the top of the page and add any Dependents and Beneficiaries as required.

## Enrolling New Members

- If the employee has dependents, click on the **Dependents** tab at the top of the page to add them. If not, continue with step 11.

First Name	Last Name	Middle Name	Gender	Date of Birth	Dependent Status		
No records to display.							

**Add Dependent**

- Click on **Add Dependent**.
- The **Dependent** window will pop-up. Complete the dependent information:
  - Enter the **First Name**.
  - Enter the **Last Name**.
  - Enter a **Middle Name** or Initial (optional).
  - Select the **Gender**.
  - Enter the **Date of Birth** in YYYY/MM/DD format.
  - Select the **Relationship to Employee** from the drop-down list.
  - Click on **OK**.

**Dependent**

First Name:

Last Name:

Middle Name:  (optional)

Gender:  Male  Female

Date of Birth:  /  /  (yyyy/mm/dd)

Relationship to Employee:  ▼

**OK** **Cancel**

9. The dependent will now appear in the dependents list. If you need to make any changes you can click on **Edit** to go back to the **Dependent** information window. You can also click on **Remove** to delete the dependent.

Details		Dependents		Beneficiaries			
First Name	Last Name	Middle Name	Gender	Date of Birth	Dependent Status		
MARK	MATHESON	M	M	Aug 11, 1979	Spouse	<a href="#">Edit</a>	<a href="#">Remove</a>

[Add Dependent](#)

10. If there are more dependents to add, repeat steps 7 – 9 until all required dependents have been added.
11. Next, click on the **Beneficiaries** tab to add the employee's beneficiaries.

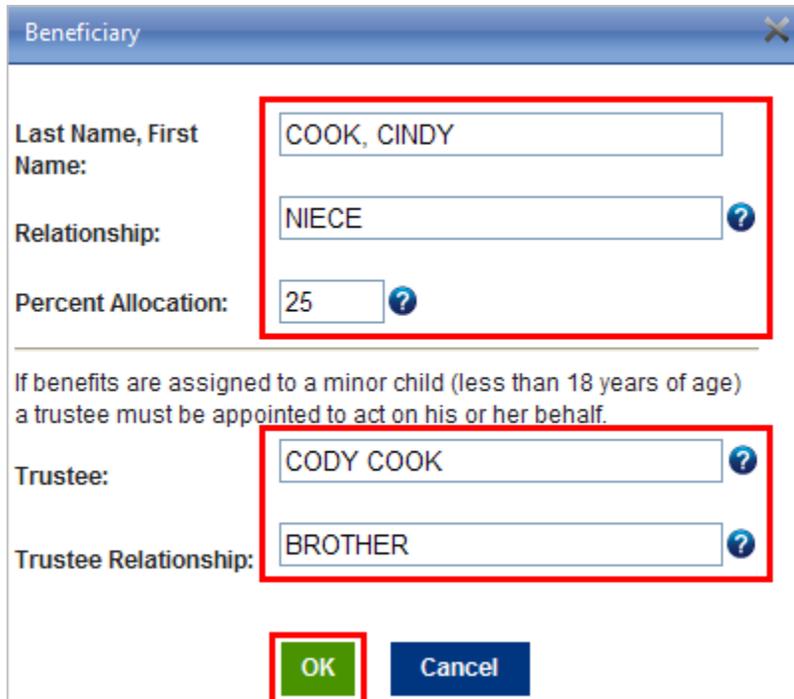
Details		Dependents		Beneficiaries		
Name	Relationship	Percent Allocation	Trustee Name	Trustee Relationship		
No records to display.						

[Add Beneficiary](#)

12. Click on **Add Beneficiary**.
13. The **Beneficiary** window will pop-up. Complete the beneficiary information:
- Enter the full name in **Last Name, First Name** format.
  - Enter the **Relationship**.  Enter relationship to employee.
  - Enter a **Percent Allocation**. Once all beneficiaries have been entered the sum of the percent allocations must exactly equal 100.  Total Percent Allocation must equal 100.
  - If the beneficiary is less than 18 years old, a trustee must be appointed to act on the child's behalf.
    - Enter the **Trustee** name.  A Trustee is only required if the beneficiary is less than 18 years of age.
    - Enter the **Trustee Relationship**.  Enter the Trustee's relationship to the employee.
  - Click on **OK**.

**Note:** If no beneficiary is wanted by the employee, enter ESTATE in the **Name** and **Relationship** fields and enter 100 as the **Percent Allocation**.

## Enrolling New Members



A screenshot of a 'Beneficiary' information window. The window has a blue title bar with the text 'Beneficiary' and a close button. The main area contains several input fields: 'Last Name, First Name' with the value 'COOK, CINDY'; 'Relationship' with the value 'NIECE'; 'Percent Allocation' with the value '25'; 'Trustee' with the value 'CODY COOK'; and 'Trustee Relationship' with the value 'BROTHER'. Each input field has a small blue question mark icon to its right. At the bottom of the window are two buttons: a green 'OK' button and a blue 'Cancel' button. A red rectangular box highlights the 'Last Name, First Name', 'Relationship', and 'Percent Allocation' fields. Another red rectangular box highlights the 'Trustee' and 'Trustee Relationship' fields. A third red rectangular box highlights the 'OK' button.

14. The beneficiary will now appear in the beneficiary list. If you need to make any changes you can click on **Edit** to go back to the **Beneficiary** information window. You can also click on **Remove** to delete the beneficiary.

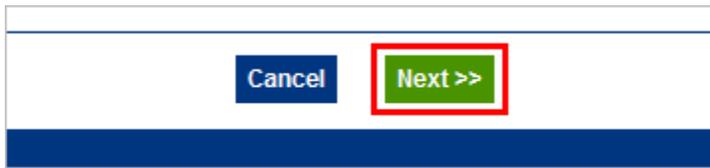


A screenshot of a table showing beneficiary information. The table has five columns: 'Name', 'Relationship', 'Percent Allocation', 'Trustee Name', and 'Trustee Relationship'. There is one row of data with the following values: 'COOK, CINDY', 'NIECE', '25', 'CODY COOK', and 'BROTHER'. To the right of the data row are two buttons: 'Edit' and 'Remove'. Below the table is a green button labeled 'Add Beneficiary'. A mouse cursor is pointing at the 'Edit' button.

Name	Relationship	Percent Allocation	Trustee Name	Trustee Relationship		
COOK, CINDY	NIECE	25	CODY COOK	BROTHER	<a href="#">Edit</a>	<a href="#">Remove</a>

15. If there are more beneficiaries to add, repeat steps 12 – 14 until all beneficiaries have been added and the total of all the percent allocations is exactly equal to 100.

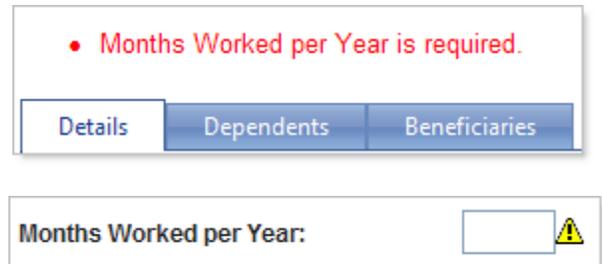
16. Once you have entered all the employee details, dependents, and beneficiaries, click on **Next>>** at the bottom of the page.



A screenshot of the bottom of the page showing two buttons: a blue 'Cancel' button and a green 'Next >>' button. The 'Next >>' button is highlighted with a red rectangular box.

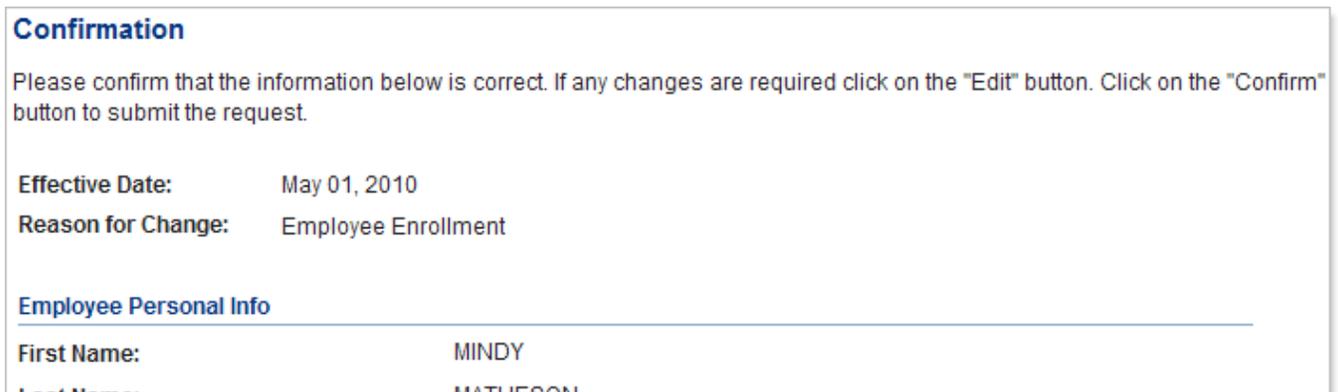
**Note:** If there are any required fields that have been left blank you will not be able to continue. The missed fields will be listed at the top of the page in red text and a  will appear beside the required fields.

You will be required to complete the information before you can click on **Next>>**.



A screenshot of the error message and form fields. At the top, a red error message reads "Months Worked per Year is required." Below this are three tabs: "Details", "Dependents", and "Beneficiaries". At the bottom, the "Months Worked per Year:" label is followed by an empty input field and a yellow warning icon.

17. You will be taken to the **Confirmation** screen. Double check that all the information entered is correct.



A screenshot of the Confirmation screen. The title is "Confirmation". The text says "Please confirm that the information below is correct. If any changes are required click on the "Edit" button. Click on the "Confirm" button to submit the request." The information shown is: Effective Date: May 01, 2010; Reason for Change: Employee Enrollment. Under "Employee Personal Info", First Name: MINDY, Last Name: MATHESON.

- If you need to make any changes, click on **Edit** to go back to the previous screen.
- If the information is correct, click on **Confirm>>** at the bottom of the page.



A screenshot of the bottom of the Confirmation screen showing three buttons: a blue 'Cancel' button, a blue 'Edit' button, and a green 'Confirm >>' button. The 'Confirm >>' button is highlighted with a red rectangular box.

## Enrolling New Members

---

18. Once you click **Confirm>>**, the **Employee Add Submitted** screen will appear.

- If the request was completed successfully, the **Status** of the employee enrolment will show as **Completed**. The **Effective Date** will be automatically calculated based on the employee information provided and the waiting period for the policy. The new employee will now appear in the policy's employee listing.

**Employee Add Submitted (Confirmation code - 2204)**

The transaction for MINDY MATHESON has been processed as of the effective date listed below. The updated information will be shown on the plan member's profile immediately.

<b>Status:</b>	Completed
<b>Reason for Change:</b>	Employee Enrollment
<b>Effective Date:</b>	May 01, 2010

Documents will be listed for your reference at the bottom of the page.

**The following list is for your reference.**

*(You will need Adobe Acrobat to view and print documents. If you do not have Adobe Acrobat, you can download it free by clicking [here](#)).*

[View Certificate of Insurance](#)  
[View Summary of Coverage](#)

A Green Shield Identification card will follow in the next couple of weeks

[Return to Policy >>](#)

- Click on the **Certificate of Insurance** link to view a Certificate of Insurance for the new employee.
- Click on the **Summary of Coverage** link to view a Summary of Coverage report for the new employee.

- The **Status** of the employee enrolment may show as **Pending** if there is additional information that is required before the request can be completed. If any documents/forms are required before the request can be finalized, they will be listed at the top of the screen. The employee will not appear in the policy's employee listing until the required documents/forms have been completed and returned to your Insurance Advisor.

**Employee Add Submitted (Confirmation code - 1815)**

 **Before this request can be finalized you must complete the following requirements.**

The application for coverage for MINDY MATHESON was submitted more than 31 days from the date of eligibility and is considered late. To be considered for coverage, please have the applicant complete the [Evidence of Insurability](#) form and return it to your Customer Service Representative.

<b>Status:</b>	Pending
<b>Reason for Change:</b>	Employee Enrollment

19. Once the employee addition has been completed, even if the employee does not have a **Family Status** of **Family**, the employee may still be entitled to Dependent Life coverage. It will be mentioned at the bottom of the reference list on the **Employee Add Submitted** screen. You will need to provide the name(s) and date(s) of birth for all dependents to your Customer Service Representative to see if they are eligible.

[View Certificate of Insurance](#)  
[View Summary of Coverage](#)

The plan member may be entitled to Dependent Life Coverage. Please provide the name(s) and date(s) of birth of all dependents to your customer service representative to see if they are eligible.

A Green Shield Identification card will follow in the next couple of weeks

The plan member is eligible for excess insurance. To maintain the proper amount of coverage please have the plan member complete the [Application for Excess Coverage](#) form and return it to your Customer Service Representative.

20. If the plan member is eligible for excess Life or Disability Insurance Coverage, above the plan's *Non-Evidence Limit*, it will also be mentioned at the bottom of the reference list on the **Employee Add Submitted** screen. The employee will need to complete the **Application for Excess Coverage** form. Once it has been completed you will need to send it your Insurance Advisor. Click on the link provided to save or print a copy of the form for the employee.

For information regarding excess coverage and non-evidence limits, please refer to the [Applying for Excess Insurance](#) section of your [Administration Guide](#):

## Enrolling New Members

21. The new employee will now appear in the policy's employee listing and you will be able to view their **Employee Information** page. On the **Coverage** tab, all the applicable coverages will have been automatically added based on the employee information provided and the standard coverages for your policy.

Employee Info	Dependents	Beneficiaries	Coverage	History
<a href="#">View Certificate of Insurance</a> <a href="#">View Summary of Coverage</a> (Note: You will need Adobe Reader to view and print the above links. If you do not have Adobe Reader, you can download it free by clicking <a href="#">here</a> .)				
Benefit	Effective Date	Expiration Date	Coverage	Premium
ACCIDENTAL DEATH & DISMEMBERMENT	May 01, 2010		\$52,000	\$ .
LONG TERM DISABILITY	May 01, 2010		\$1,445	\$ .
DENTAL	May 01, 2010		FAMILY	\$ .
DEPENDANT LIFE	May 01, 2010		INCLUDED	\$ .
EXTENDED HEALTH CARE	May 01, 2010		FAMILY	\$ .
LIFE	May 01, 2010		\$52,000	\$ .
VISION	May 01, 2010		FAMILY	\$ .
SHORT TERM DISABILITY	May 01, 2010		\$300	\$ .
<b>Total Premium</b>				<b>\$ .</b>

**Note:** As mentioned in the previous step, if the employee is now eligible for excess Life or Disability Insurance Coverage, the coverage amounts have only been initially set at the plan's *Non-Evidence Limits*. An Application for Excess Coverage will need to be completed and approved before the coverages will increase to the eligible amounts.

22. On the employee's **History** tab, the employee addition will be listed. You can click on **Details** to again view the **Employee Add Submitted** screen.

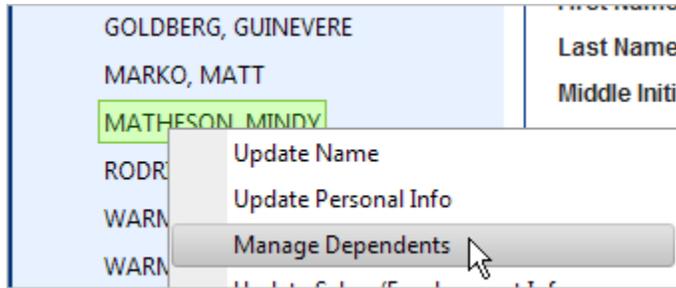
Employee Info	Dependents	Beneficiaries	Coverage	History
Change Made	Effective Date	Status	Completed Date	
Employee Add (MINDY MATHESON)	May 01, 2010	Completed	May 13, 2010	<a href="#">Details</a>

## Enrolling a Dependent

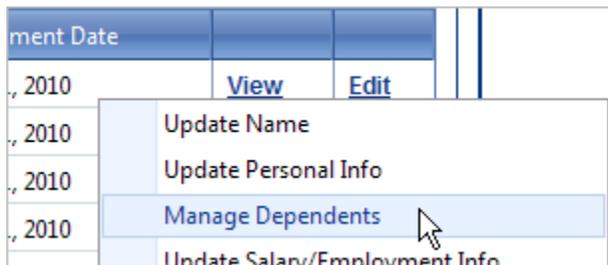
New dependents for existing employees who are eligible for employee benefits may be enrolled directly online. If an existing employee does not have any pre-existing active dependents, their **Family Status** will automatically change to **Family** on the effective date of the new dependent.

1. To add a dependent to an existing employee, there are 3 different ways to begin:

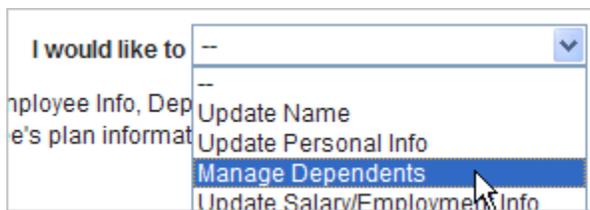
- Right-click on the employee name from the navigation pane and select **Manage Dependents**.



- Go to the **Employees** tab on the **Policy Information** page, locate the employee from the list and click on **Edit** on the right. Select **Manage Dependents**.



- At the top right of the **Employee Information** page, click on the down arrow from the **I would like to** drop-down list and select **Manage Dependents**.



## Enrolling New Members

- You will be taken to the **Manage Dependents** screen where all of the employee's current active dependents will be listed. Click on the **Add Dependent** button at the bottom right of the screen.

**Manage Dependents - MINDY MATHESON**

Listed below is information regarding this employee's dependent(s). Click on the "Add Dependent" button to add a dependent.

Status	Name	Gender	Date of Birth	Relationship	Enrollment Date	Reason for Change	Effective Date of Change	Action
	MARK MATHESON	Male	Aug 11, 1979	Spouse	May 01, 2009	N/A	N/A	<a href="#">•Edit</a> <a href="#">•Terminate</a>

**Add Dependent**

- The **Add Dependent** screen will appear, complete the dependent information:
  - Enter the **First Name**.
  - Enter the **Last Name**.
  - Enter a **Middle Name** or Initial as required.
  - Select the **Gender**.
  - Enter the **Date of Birth** in YYYY/MM/DD format.
  - Select the **Relationship to Employee** from the drop-down list.
  - Click on **OK**.

**Add Dependent - MINDY MATHESON**

You can add a dependent by entering the information in the fields below. Click the "Next" button to continue.

First Name:

Last Name:

Middle Name:

Gender:  Male  Female

Date of Birth:  /  /

Relationship to Employee:  ▼

4. In the next screen, select the reason for the dependent addition and click on **Next>>**.

- If you selected **Spouse** in the step above, you will see the following options:

**Reason for Change**

Select an option from below. Click the "Next" button to continue.

- Marriage
- Common Law ?
- Loss of Similar Coverage ?
- Immigration
- Other

[<< Back](#) [Next >>](#)

- If you selected **Child** in the step above, you will see the following options:

**Reason for Change**

Select an option from below. Click the "Next" button to continue.

- Marriage
- Common Law ?
- Birth
- Loss of Similar Coverage ?
- Immigration
- Adoption / Guardianship
- Child over 21 returning to school ?
- Child under 21 years returned home ?
- Other

[<< Back](#) [Next >>](#)

## Enrolling New Members

- Depending on your selection above, you may be asked to enter a date (e.g. marriage date, date of permanent residence, date of 1<sup>st</sup> day of class for students over 21, etc.). Enter the required date in YYYY/MM/DD format and click on **Next>>**.

### Effective Date

Enter in the information below. Click the "Next" button to continue.

Effective Date:  /  /  (yyyy/mm/dd) ?

[<< Back](#) [Next >>](#)

The help pop-up will help you determine which date should be entered here. It will vary depending on the reason selected.

- In the **Confirmation** screen, the dependent will appear in the dependent list.

### Confirmation

Please confirm that the information below is correct. If any changes are required click on the "Edit" button. Click on the "Confirm" button to submit the request.

Listed below is information regarding this employee's dependent(s). Click on the "Add Dependent" button to add a dependent.

Status	Name	Gender	Date of Birth	Relationship	Enrollment Date	Reason for Change	Effective Date of Change	Action
	MARK MATHESON	Male	Aug 11, 1979	Spouse	May 01, 2009	N/A	N/A	<a href="#">•Edit</a> <a href="#">•Terminate</a>
Added	MATTHEW MATHESON	Male	Jan 14, 2010	Child		Birth	Jan 14, 2010	<a href="#">•Edit</a> <a href="#">•Terminate</a>

[Add Dependent](#)

[Cancel](#) [Confirm >>](#)

- If you need to make any changes you can click on the **Edit** link to the right of the new dependent to go back to the **Add Dependent** screen.
- If the information is correct, click on the **Confirm>>** button.

7. Once you click **Confirm**, the **Manage Dependent Submitted** screen will appear.
- If the request was completed successfully, the **Status** of the dependent enrolment will show as **Completed**. The **Effective Date** will be automatically calculated based on the dependent information provided and the waiting period for the policy.

### Manage Dependents Submitted (Confirmation code - 1841)

Edit Type	Name	Gender	Date of Birth	Relationship	Enrollment Date	Reason for Change	Effective Date of Change	Status
Dependent Add	MATTHEW MATHESON	Male	Jan 14, 2010	Child	Jan 14, 2010	Birth	Jan 14, 2010	Completed

At the bottom of the page, documents will be listed for your reference.

**The following list is for your reference.**

*(You will need Adobe Acrobat to view and print documents. If you do not have Adobe Acrobat, you can download it free by clicking [here](#)).*

[View Certificate of Insurance](#)

[View Summary of Coverage](#)

A Green Shield Identification card will follow in the next couple of weeks

[Return to Policy >>](#)

- Click on the **Certificate of Insurance** link to view an updated Certificate of Insurance for the employee.
- Click on the **Summary of Coverage** link to view an updated Summary of Coverage report for the employee.

## Enrolling New Members

- The **Status** of the dependent enrolment may show as **Pending** if there is additional information that is required before the request can be completed. If any documents/forms are required before the request can be finalized, they will be listed at the top of the screen.

 **Before this request can be finalized you must complete the following requirements.**

The application for coverage was submitted more than 31 days from the date of eligibility and is considered late. To be reviewed for coverage, please have the applicant complete the [Evidence of Insurability](#) form and return it to your Customer Service Representative.

The following manage dependents will be processed once the above requirements have been completed. The updated information will be shown on the employee's profile once the request has been finalized by HED.

**Status:** Pending  
**Reason for Change:** Manage Dependents

The dependent will not appear on the employee's **Dependents** tab until the required documents/forms have been completed and returned to your Insurance Advisor.

- Once the dependent addition has been completed, the dependent will appear on the employee's **Dependents** tab.

Employee Info	Dependents	Beneficiaries	Coverage	History	
<b>Show:</b> <input checked="" type="radio"/> Active Dependents <input type="radio"/> Inactive Dependents					
Name	Gender	Relationship	Green Shield #	Date of Birth	Enrollment Date
MATHESON, MARK	Male	Spouse	0	Aug 11, 1979	May 01, 2010
MATHESON, MATTHEW	Male	Child	0	Jan 14, 2010	Jan 14, 2010

9. If the **Family Status** automatically changed from **Single/Partial** to **Family**, any coverage changes will appear on the employee's **Coverage** tab. If the dependent addition was effective on a past date, just the updated coverages will be listed on this tab. If the dependent addition is effective for a future date, the old coverages will be listed in grey, and the updated coverages will be listed in black.

Employee Info   Dependents   Beneficiaries   Coverage   History				
<a href="#">View Summary of Coverage</a> <a href="#">View Certificate of Insurance</a>				
Benefit	Effective Date	Expiration Date	Coverage	Premium
ACCIDENTAL DEATH & DISMEMBERMENT	Feb 01, 2010		\$54,000	\$ .
LONG TERM DISABILITY	Feb 01, 2010		\$1,500	\$ .
DENTAL	Jun 01, 2009	May 01, 2010	SINGLE	\$ .
DENTAL	May 01, 2010		FAMILY	\$ .
DEPENDANT LIFE	May 01, 2010		INCLUDED	\$ .
EXTENDED HEALTH BENEFITS	Jun 01, 2009	May 01, 2010	SINGLE	\$ .
EXTENDED HEALTH BENEFITS	May 01, 2010		FAMILY	\$ .
LIFE	Feb 01, 2010		\$54,000	\$ .
VISION	Jun 01, 2009	May 01, 2010	SINGLE	\$ .
VISION	May 01, 2010		FAMILY	\$ .
SHORT TERM DISABILITY	Feb 01, 2010		\$346	\$ .
<b>Total Premium</b>				<b>\$ .</b>

10. On the employee's **History** tab, the dependent addition will be listed. You can click on **Details** to again view the **Manage Dependents Submitted** screen.

Employee Info   Dependents   Beneficiaries   Coverage   History				
Change Made	Effective Date	Status	Completed Date	
Manage Dependents (MINDY MATHESON)	May 11, 2010	Completed	May 11, 2010	<a href="#">Details</a>

# Updating Employee Information

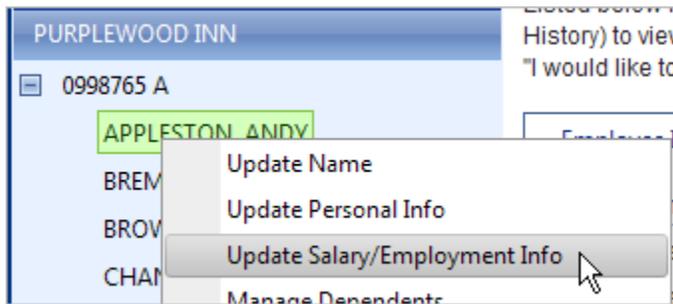
---

## Salary & Employment Information Changes

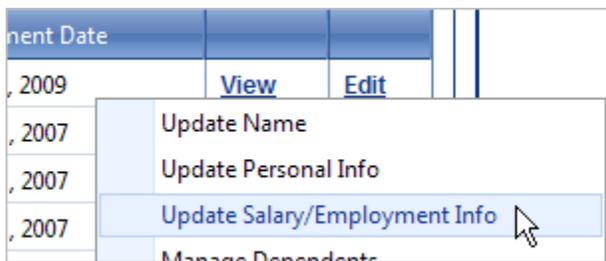
Employment information that can be updated using the Online Administration Web Site include the employee status (e.g. employee, manager, owner, etc.), occupation, income, hours worked per week, and months worked per year.

1. To change an employee's salary and employment information, there are 3 different ways to begin:

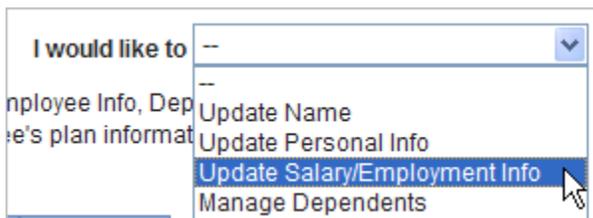
- Right-click on the employee's name from the navigation pane and select **Update Salary/Employment Info**.



- Go to the **Employees** tab on the **Policy Information** page, locate the employee from the list and click on **Edit** on the right. Select **Update Salary/Employment Info**.



- At the top right of the **Employee Information** page, click on the down arrow from the **I would like to** drop-down list and select **Update Salary/Employment Info**.



- You will be taken to the **Change Employment Information and Salary** screen. The current employment information will be showing under Original Information.

Under New Information, edit the fields as required and click on **Next>>**.

### Change Employment Information and Salary - APPLESTON, ANDY

You can change an employee's employment information by entering the new information in the fields below. Click the "Next" button to continue.

	<u>Original Information</u>	<u>New Information</u>
Date Hired:	Dec 01, 2009	Dec 01, 2009
Employee Status:	Employee	Employee <input type="text"/>
Occupation:	SERVER	SERVER <input type="text"/>
Income:	\$26,000.00 Annual	30000.00 <input type="text"/> Income Period: Annual <input type="text"/>
Hours Worked per Week:	40	40 <input type="text"/>
Months Worked per Year:	12	12 <input type="text"/>

- In the next screen you will need to enter the **Effective Date** of the change in YYYY/MM/DD format. Click on **Next>>**.

### Effective Date

Enter in the information below. Click the "Next" button to continue.

Effective Date:  /  /  (yyyy/mm/dd)

## Updating Employee Information

4. In the **Confirmation** screen, double check that all the new information has been entered correctly.

**Confirmation**

Please confirm that the information below is correct. If any changes are required click on the "Edit" button. Click on the "Confirm" button to submit the request.

Effective Date: May 01, 2010  
Reason for Change: Correction

	<u>Original Information</u>	<u>New Information</u>
Date Hired:	Dec 01, 2009	Dec 01, 2009
Employee Type:	Employee	Employee
Occupation:	SERVER	SERVER
Income:	\$26,000.00 Annual	\$30,000.00 Annual
Hours Worked per Week:	40	40.0
Months Worked per Year:	12	12

- If you need to make any changes, click on **Edit** to go back to the **Change Employment Information & Salary** edit screen.
  - If the information is correct, click on **Confirm>>** to complete the changes.
5. Once you click **Confirm>>**, the **Employee Salary Change Submitted** screen will appear.

**Employment Info Change Submitted (Confirmation code - 2006)**

The transaction for ANDY APPLESTON has been processed as of the effective date listed below. The updated information will be shown on the plan member's profile immediately.

Status: Completed  
Reason for Change: Correction  
Effective Date: May 01, 2010

At the bottom of the page, documents are listed for your reference.

The following list is for your reference.

[Certificate of Insurance](#)  
[Summary of Coverage](#)

The plan member is eligible for excess insurance. To maintain the proper amount of coverage please have the plan member complete the [Application for Excess Coverage](#) form and return it to your Customer Service Representative.

[Return to Employee >>](#)

- Click on the **Certificate of Insurance** link to view an updated [Certificate of Insurance](#) for the employee.
  - Click on the **Summary of Coverage** link to view an updated [Summary of Coverage](#) report for the employee.
6. If the plan member is now eligible for excess Life or Disability Insurance Coverage, above the plan's *Non-Evidence Limit*, it will be mentioned at the bottom of the reference list. The employee will need to complete the **Application for Excess Coverage** form. Once it has been completed you will need to send it your Insurance Advisor. Click on the link provided to save or print a copy of the form for the employee.

For information regarding excess coverage and non-evidence limits, please refer to the [Applying for Excess Insurance](#) section of your [Administration Guide](#):

## Updating Employee Information

7. Once the salary and employment information has been changed, any coverage changes will appear on the employee's **Coverage** tab. If the employment information changes were effective on a past date, just the updated coverages will be listed on this tab. If the employment information changes are effective for a future date, the old coverages will be listed in grey, and the updated coverages will be listed in black.

Employee Info	Dependents	Beneficiaries	Coverage	History
<a href="#">View Summary of Coverage</a> <a href="#">View Certificate of Insurance</a>				
Benefit	Effective Date	Expiration Date	Coverage	Premium
ACCIDENTAL DEATH & DISMEMBERMENT	Jun 01, 2009	May 01, 2010	\$52,000	\$ .
ACCIDENTAL DEATH & DISMEMBERMENT	May 01, 2010		\$54,000	\$ .
LONG TERM DISABILITY	Dec 01, 2009	May 01, 2010	\$1,445	\$ .
LONG TERM DISABILITY	May 01, 2010		\$1,500	\$ .
DENTAL	Jun 01, 2009		FAMILY	\$ .
DEPENDANT LIFE	May 01, 2010		INCLUDED	\$ .
EXTENDED HEALTH BENEFITS	May 01, 2010		FAMILY	\$ .
LIFE	Jun 01, 2009	May 01, 2010	\$52,000	\$ .
LIFE	May 01, 2010		\$54,000	\$ .
VISION	Jun 01, 2009		FAMILY	\$ .
SHORT TERM DISABILITY	Jun 01, 2009	May 01, 2010	\$300	\$ .
SHORT TERM DISABILITY	May 01, 2010		\$346	\$ .
<b>Total Premium</b>				<b>\$ .</b>

**Note:** As mentioned in the previous step, if the employee is now eligible for excess Life or Disability Insurance Coverage, the coverage amounts may have only been increased to the plan's *Non-Evidence Limit* as an Application for Excess Coverage will need to be completed and approved before the coverages will increase to the eligible amounts.

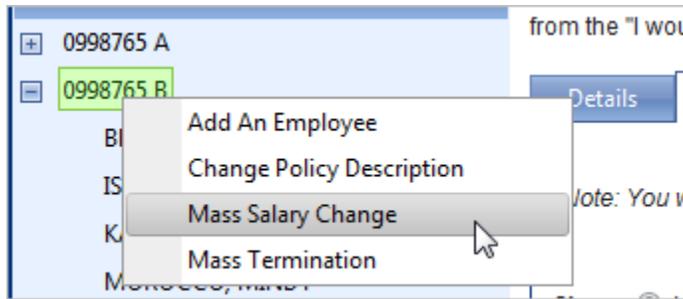
8. On the employee's **History** tab, the employment information change will be listed. You can click on **Details** to again view the **Employee Salary Change Submitted** screen.

Employee Info	Dependents	Beneficiaries	Coverage	History
Change Made	Effective Date	Status	Completed Date	
Employment Info Change (ANDY APPLESTON)	May 01, 2010	Completed	Apr 21, 2010	<a href="#">Details</a>

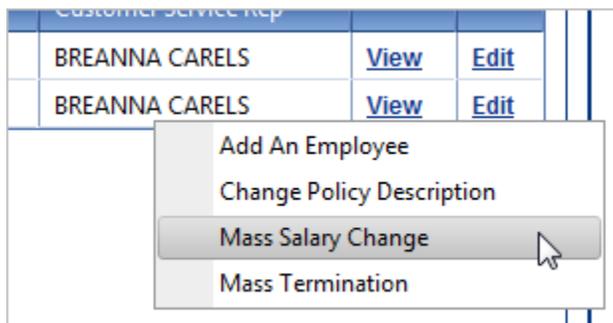
## Mass Salary Changes

If you have several employees with salary updates, you can update them at the same time through the Mass Salary Change feature.

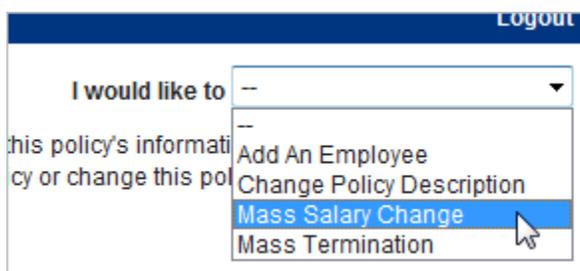
1. To perform a mass employee salary change, there are 3 different ways to begin:
  - a. Right-click on the Policy number/description from the navigation pane and select **Mass Salary Change** from the pop-up menu.



- b. While viewing the **Policies** tab from the **Account Information** page, locate the policy from the list and click on **Edit** to the right. Select **Mass Salary Change** from the pop-up menu.



- c. While viewing the **Policy Information** page, at the top right, click on the down arrow from the **I would like to** drop-down list and select **Mass Salary Change**.



## Updating Employee Information

- You will be taken to the **Mass Salary** screen. The active employees will be listed along with their current employment information.

Click the checkboxes in front of the employees whose salaries you wish to edit.

**Mass Salary 913424**

You can change multiple employees' salaries by selecting the employees in the left-hand column and entering the information, including the effective date of the change, in the activated fields. Click the "Submit Change" button to continue.

<input type="checkbox"/>	Name	Status	Income	Per	Hours	Months	Effective Date
<input type="checkbox"/>	BRADLEY, BENJAMIN	Employee	26.00	Hourly	40	12	
<input checked="" type="checkbox"/>	ISAAK, ISABELLA	Employee	27,500.00	Annual	40	12	/ /
<input type="checkbox"/>	KARMAN, KENNY	Employee	55,000.00	Annual	40	12	
<input checked="" type="checkbox"/>	MOROCCO, MINDY	Employee	35.00	Hourly	40	12	/ /
<input checked="" type="checkbox"/>	NORIS, NADINE	Employee	22.00	Hourly	40	12	/ /
<input type="checkbox"/>	RUSSELL, RICH	Employee	22.00	Hourly	40	12	
<input type="checkbox"/>	WARMAN, WILLIAM	Employee	50,000.00	Annual	40	12	
<input type="checkbox"/>	WEBSTER, WILLIAM	Employee	20.00	Hourly	40	12	

- For each employee with a checkmark, update their salary information as required.
  - You can update their employee **Status**, **Income**, income **Per** range, **Hours** worked per week, and **Months** worked per year.

<input type="checkbox"/>	Name	Status	Income	Per	Hours	Months	Effective Date
<input type="checkbox"/>	BRADLEY, BENJAMIN	Employee	26.00	Hourly	40	12	
<input checked="" type="checkbox"/>	ISAAK, ISABELLA	Owner	60500.0	Annual	40	12	2013 / 04 / 15
<input type="checkbox"/>	KARMAN, KENNY	Employee	55,000.00	Annual	40	12	
<input checked="" type="checkbox"/>	MOROCCO, MINDY	Employee	42000.0	Annual	40	12	2013 / 05 / 01
<input checked="" type="checkbox"/>	NORIS, NADINE	Employee	22.5	Hourly	40	12	2013 / 05 / 01

- Enter the **Effective Date** for the salary change.

4. Once all the changes have been made for the selected employees, click on **Submit Change>>**.

A screenshot of a web interface showing a form with several input fields. The fields contain the following values: 'Employee' (dropdown), '20.00', 'Hourly' (dropdown), '40', and '12'. Below the form are two buttons: a blue 'Cancel' button and a green 'Submit Change >>' button. The 'Submit Change >>' button is highlighted with a red rectangular border.

5. In the **Confirmation** screen, just the employees that you made changes to will be listed. Double check that all the new information has been entered correctly.

**Confirmation**

Please confirm that the information below is correct. If any changes are required click on the "Edit" button. Click on the "Confirm" button to submit the request.

Name	Employee Status	Income	Per	Hours	Months	Effective Date
ISAAK, ISABELLA	Owner	\$60,500.00	Annual	40.0	12	Apr 15, 2013
MOROCCO, MINDY	Employee	\$42,000.00	Annual	40.0	12	May 01, 2013
NORIS, NADINE	Employee	\$22.50	Hourly	40.0	12	May 01, 2013

Cancel    Edit    Confirm >>

- If you need to make any changes, click on **Edit** to go back to the **Mass Salary** edit screen.
- If the information is correct, click on **Confirm>>** to complete the changes.

## Updating Employee Information

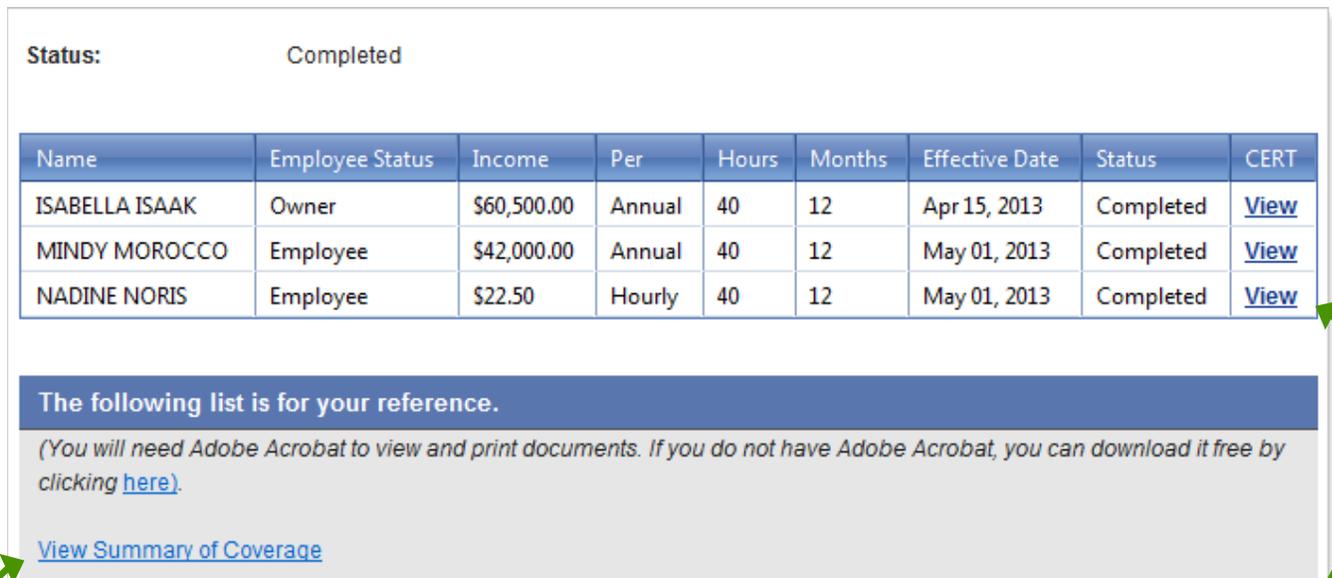
6. Once you click **Confirm>>**, the **Mass Salary Change Submitted** screen will appear. The status of each employee salary change will appear in a column to the right. The overall status of all the salary changes will appear at the top. If any of the employees have a status of **Pending**, the overall status will show as **Pending**.

**Status:** Completed

Name	Employee Status	Income	Per	Hours	Months	Effective Date	Status	CERT
ISABELLA ISAAK	Owner	\$60,500.00	Annual	40	12	Apr 15, 2013	Completed	<a href="#">View</a>
MINDY MOROCCO	Employee	\$42,000.00	Annual	40	12	May 01, 2013	Completed	<a href="#">View</a>
NADINE NORIS	Employee	\$22.50	Hourly	40	12	May 01, 2013	Completed	<a href="#">View</a>

The following list is for your reference.  
(You will need Adobe Acrobat to view and print documents. If you do not have Adobe Acrobat, you can download it free by clicking [here](#)).

[View Summary of Coverage](#)



Documents will be listed for your reference.

- To the right of an employee, click on the **View** link to view an updated Certificate of Insurance for the employee.
  - Near the bottom, click on the **View Summary of Coverage** link to view an updated Summary of Coverage report for the entire policy.
7. If a plan member is now eligible for excess Life or Disability Insurance Coverage, above the plan's *Non-Evidence Limit*, it will be mentioned at the bottom of the reference list. The employee will need to complete the **Application for Excess Coverage** form. Once it has been completed you will need to send it your Insurance Advisor. Click on the link provided to save or print a copy of the form for the employee.

ISABELLA ISAAK (LONG TERM DISABILITY 1528) is eligible for excess insurance. To maintain the proper amount of coverage please have the plan member complete the [Application for Excess Coverage](#) form and return it to your Customer Service Representative.

8. Once the salary information has been completed for an employee, any coverage changes will appear on the employee's **Coverage** tab.

9. On the *policy's* **History** tab, the mass salary change will be listed. You can click on **Details** to again view the **Mass Salary Change Submitted** screen.

**Policy 0998765 B** I would like to

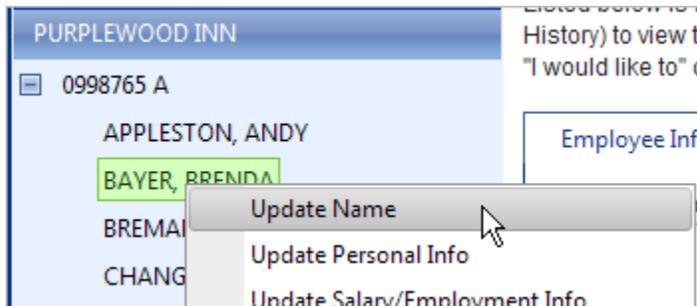
Listed below is information regarding this policy. Click on "Details" to view this policy's information. Click on "Employees" to view a list of employees in this policy. You can add an employee to this policy or change this policy's description by selecting from the "I would like to" drop down list above.

**Show:**  
 Pending  Completed/Cancelled

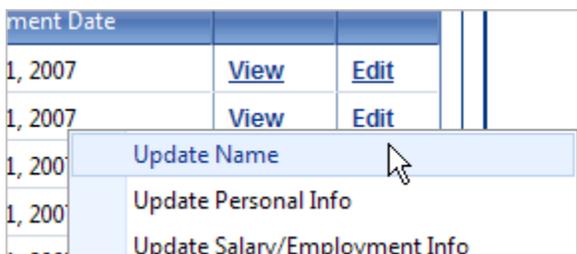
Transaction Type	Reason	Effective Date	Completed Date	Status	
• Mass Salary Change (Mass Salary Change)		Apr 12, 2013	Apr 12, 2013	Completed	<a href="#">Details</a>
-Employment Info Change (ISABELLA ISAAK)		Apr 15, 2013	Apr 12, 2013	Completed	
-Employment Info Change (MINDY MOROCCO)		May 01, 2013	Apr 12, 2013	Completed	
-Employment Info Change (NADINE NORIS)		May 01, 2013	Apr 12, 2013	Completed	
• Employee Reinstatement (IRENE IRELAND)		Feb 01, 2013	Jan 31, 2013	Completed	<a href="#">Details</a>
-Employment Info Change (IRENE IRELAND)		Feb 01, 2013	Jan 31, 2013	Completed	
Dependent Reinstatement (KASUN KATE)		Feb 01, 2013	Jan 31, 2013	Completed	

### Name Changes

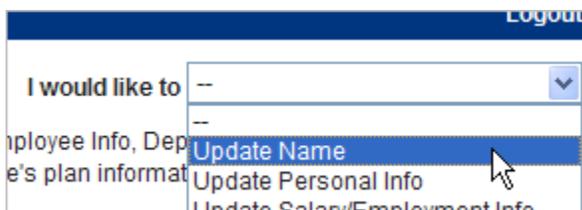
1. To change an employee's name, there are 3 different ways to begin:
  - Right-click on the employee's name from the navigation pane and select **Update Name**.



- Go to the **Employees** tab on the **Policy Information** page, locate the employee from the list and click on **Edit** to the right. Select **Update Name**.



- At the top right of the **Employee Information** page, click on the down arrow from the **I would like to** drop-down list and select **Update Name**.



- You will be taken to the **Change Employee Name** screen. The current **First, Last, and Middle Names** will be showing under Original Information.

Under New Information, edit the names as required and click on **Next>>**.

### Change Employee Name - BAYER, BRENDA

You can change an employee's name by entering the new information in the fields below. Click the "Next" button to continue.

	Original Information	New Information
First Name:	BRENDA	<input type="text" value="BRENDA"/>
Last Name:	BAYER	<input type="text" value="BROWN"/>
Middle Name:		<input type="text" value="BETH"/>

- In the next screen you will need to select a reason for the name change. Select from the options below and click on **Next>>**.

### Reason for Change

Select an option from below. Click the "Next" button to continue.

Marriage or Divorce  
 Correction  
 Choice

## Updating Employee Information

4. In the **Confirmation** screen, double check that all the new information has been entered correctly.

### Confirmation

Please confirm that the information below is correct. If any changes are required click on the "Edit" button. Click on the "Confirm" button to submit the request.

**Effective Date:** Apr 01, 2010  
**Reason for Change:** Marriage or Divorce

	<u>Original Information</u>	<u>New Information</u>
<b>First Name:</b>	BRENDA	BRENDA
<b>Last Name:</b>	BAYER	BROWN
<b>Middle Name:</b>		BETH

- If you need to make any changes, click on **Edit** to go back to the **Change Employee Name** edit screen.
  - If the information is correct, click on **Confirm>>** to complete the changes.
5. Once you click **Confirm>>** the **Employee Name Change Submitted** screen will appear.

### Employee Name Change Submitted (Confirmation code - 1705)

The transaction for BRENDA BROWN has been processed as of the effective date listed below. The updated information will be shown on the plan member's profile immediately.

**Status:** Completed  
**Reason for Change:** Marriage or Divorce  
**Effective Date:** Apr 01, 2010

At the bottom of the page, documents are listed for your reference.

The following list is for your reference.

[Certificate of Insurance](#)  
[Summary of Coverage](#)

Return to Employee >>

- Click on the **Certificate of Insurance** link to view an updated Certificate of Insurance for the employee.
  - Click on the **Summary of Coverage** link to view an updated Summary of Coverage report for the employee.
6. The name will immediately be updated in the policy's employee listing.

☐

0998765 A

APPLESTON, ANDY

BREMAR, BRYAN

BROWN, BRENDA

CHANG, COREY

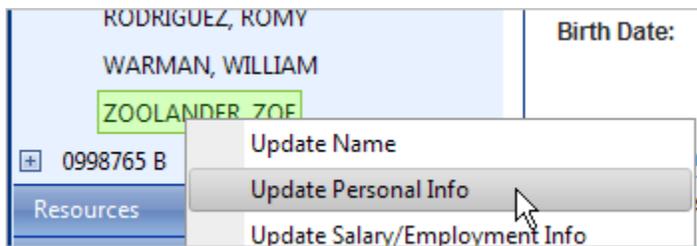
7. On the employee's **History** tab, the employee name change will be listed. You can click on **Details** to again view the Employee Name Change Submitted screen.

Employee Info		Dependents	Beneficiaries	Coverage	History
Change Made		Effective Date	Status	Completed Date	
Employee Name Change (BRENDA BROWN)		Apr 30, 2010	Completed	Apr 30, 2010	<a href="#">Details</a>

### Personal Information Changes

Personal information for an employee refers to their *date of birth* and *gender*. This information can be updated in case it has been entered incorrectly.

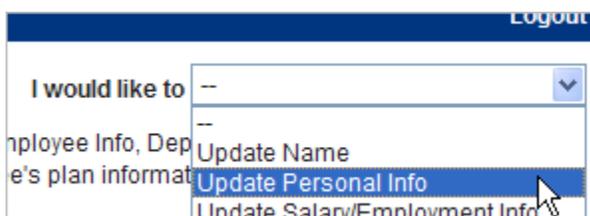
1. To change an employee's personal information, there are 3 different ways to begin:
  - Right-click on the employee's name from the navigation pane and select **Update Personal Info**.



- Go to the **Employees** tab on the **Policy Information** page, locate the employee from the list and click on **Edit** on the right. Select **Update Personal Info**.



- At the top right of the **Employee Information** page, click on the down arrow from the **I would like to** drop-down list and select **Update Personal Info**.



- You will be taken to the **Change Personal Info** screen. The current **Date of Birth** and **Gender** will be showing under Original Information.

Under New Information, edit the information as required and click on **Next>>**.

### Change Personal Info - ZOOLANDER, ZOE

You can change an employee's personal information by entering the new information in the fields below. Click the "Next" button to continue.

	Original Information	New Information
Date of Birth:	May 02, 1979	<div style="border: 2px solid red; padding: 2px;"> <input type="text" value="1978"/> / <input type="text" value="05"/> / <input type="text" value="12"/> (yyyy/mm/dd)                 </div>
Gender:	Female	<input type="radio"/> Male <input checked="" type="radio"/> Female

Cancel
Next >>

- In the **Confirmation** screen, double check that all the new information has been entered correctly.

### Confirmation

Please confirm that the information below is correct. If any changes are required click on the "Edit" button. Click on the "Confirm" button to submit the request.

Effective Date:	Apr 13, 2010	
Reason for Change:	Correction	
	Original Information	New Information
Date of Birth:	May 02, 1979	May 12, 1978
Gender:	Female	Female

Cancel
Edit
Confirm >>

- If you need to make any changes, click on **Edit** to go back to the **Change Personal Info** edit screen.
- If the information is correct, click on **Confirm>>** to complete the changes.

## Updating Employee Information

4. Once you click **Confirm>>** the **Employee Personal Info Submitted** screen will appear.

**Employee Personal Info Submitted (Confirmation code - 1810)**

The transaction for ZOE ZOOLANDER has been processed as of the effective date listed below. The updated information will be shown on the plan member's profile immediately.

**Status:** Completed  
**Reason for Change:** Correction  
**Effective Date:** Apr 13, 2010

[Information to be Updated](#)

**Date of Birth:** May 12, 1978  
**Gender:** Female

At the bottom of the page, documents are listed for your reference.

The following list is for your reference.

[Certificate of Insurance](#)  
[Summary of Coverage](#)

[Return to Employee >>](#)

- Click on the **Certificate of Insurance** link to view an updated Certificate of Insurance for the employee.
  - Click on the **Summary of Coverage** link to view an updated Summary of Coverage report for the employee.
5. On the **History** tab, the employee personal information change will be listed. You can click on **Details** to again view the **Employee Personal Info Submitted** screen.

Employee Info	Dependents	Beneficiaries	Coverage	History	
Change Made		Effective Date	Status	Completed Date	
Employee Personal Info (ZOE ZOOLANDER)		Apr 30, 2010	Completed	Apr 30, 2010	<a href="#">Details</a>

## Dependent Personal Information Changes

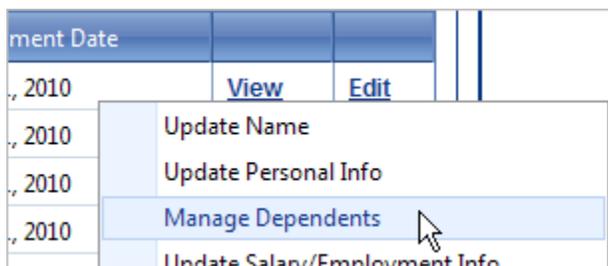
A dependent's personal information may be updated directly online. This can include changes to a dependent's name or correcting a dependent's gender, date of birth, or dependent type if it was entered incorrectly.

1. To change a dependent's personal information, there are 3 different ways to begin:

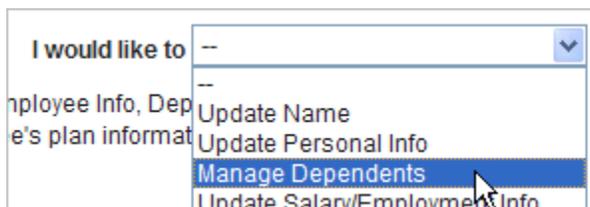
- Right-click on the employee name from the navigation pane and select **Manage Dependents**.



- Go to the **Employees** tab on the **Policy Information** page, locate the employee from the list and click on **Edit** on the right. Select **Manage Dependents**.



- At the top right of the **Employee Information** page, click on the down arrow from the **I would like to** drop-down list and select **Manage Dependents**.



## Updating Employee Information

- You will be taken to the **Manage Dependents** screen where all of the employee's current or previous dependents will be listed.

Click on the **Edit** link to the right of the active dependent you wish to edit.

**Manage Dependents - MINDY MATHESON**

Listed below is information regarding this employee's dependent(s). Click on the "Add Dependent" button to add a dependent.

Status	Name	Gender	Date of Birth	Relationship	Enrollment Date	Reason for Change	Effective Date of Change	Action
	MARK MATHESON	Male	Aug 11, 1979	Spouse	Apr 15, 2010	N/A	N/A	<a href="#">Edit</a> <a href="#">Terminate</a>
	MATTHEW MATHESON	Male	Jan 14, 2010	Child	Jan 14, 2010	N/A	N/A	<a href="#">Edit</a> <a href="#">Terminate</a>

[Add Dependent](#)

[Return to Employee](#)

- The **Edit Dependent** screen will appear. Make any required changes to the dependent's information then click on **Next>>**.

**Edit Dependent - MINDY MATHESON**

You can add a dependent by entering the information in the fields below. Click the "Next" button to continue.

First Name:

Last Name:

Middle Name:

Gender:  Male  Female

Date of Birth:  /  /  (yyyy/mm/dd)

Relationship to Employee:  ▼

[Cancel](#) [Next >>](#)

4. In the **Confirmation** screen, the dependent will appear in the dependent listing with a status of **Edited**.

**Confirmation**

Please confirm that the information below is correct. If any changes are required click on the "Edit" button. Click on the "Confirm" button to submit the request.

Listed below is information regarding this employee's dependent(s). Click on the "Add Dependent" button to add a dependent.

Status	Name	Gender	Date of Birth	Relationship	Enrollment Date	Reason for Change	Effective Date of Change	Action
Edited	MARK MATHESON	Male	Aug 11, 1978	Spouse	Apr 15, 2010	Correction	Apr 30, 2010	<a href="#">•Edit</a> <a href="#">•Terminate</a>
	MATTHEW MATHESON	Male	Jan 14, 2010	Child	Jan 14, 2010	N/A	N/A	<a href="#">•Edit</a> <a href="#">•Terminate</a>

Add Dependent

Cancel
Confirm >>

- If you need to make any further changes, you may re-click on the **Edit** link to go back to the **Edit Dependent** screen.
  - If the new information is correct, click on the **Confirm>>** button to complete the changes.
5. Once you click **Confirm>>**, the **Manage Dependents Submitted** screen will appear.

**Manage Dependents Submitted (Confirmation code - 1853)**

Edit Type	Name	Gender	Date of Birth	Relationship	Enrollment Date	Reason for Change	Effective Date of Change	Status
Dependent Personal Change	MARK MATHESON	Male	Aug 11, 1978	Spouse	Apr 15, 2010	Correction	Apr 30, 2010	Completed

## Updating Employee Information

---

At the bottom of the page, documents are listed for your reference.

The following list is for your reference.

[Certificate of Insurance](#)  
[Summary of Coverage](#)

[Return to Employee >>](#)

- Click on the **Certificate of Insurance** link to view an updated [Certificate of Insurance](#) for the employee.
  - Click on the **Summary of Coverage** link to view an updated [Summary of Coverage](#) report for the employee.
6. On the employee's **History** tab, the dependent personal information change will be listed. You can click on **Details** to again view the **Manage Dependents Submitted** screen.

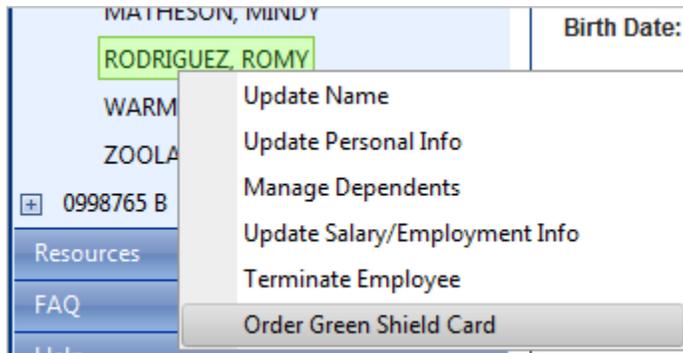
Employee Info	Dependents	Beneficiaries	Coverage	History	
Change Made		Effective Date	Status	Completed Date	
Manage Dependents (MINDY MATHESON)		Apr 30, 2010	Completed	Apr 30, 2010	<a href="#">Details</a>

## Green Shield Cards

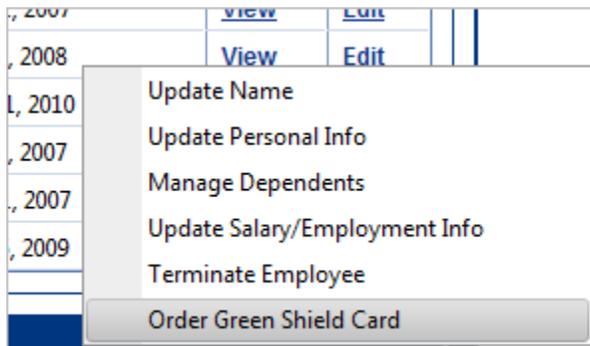
An employee's Green Shield Card may be re-ordered directly online. This can only be done for active employees with Health and/or Dental coverage.

1. To order a Green Shield Card for an employee, there are 3 different ways to begin:

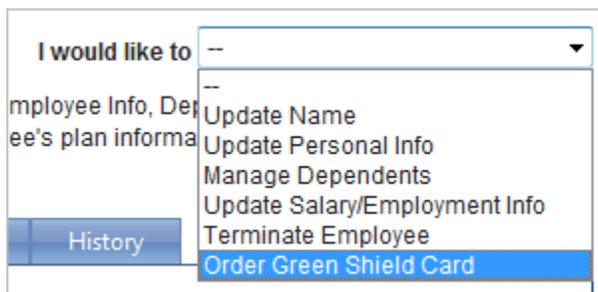
- Right-click on the employee name from the navigation pane and select **Order Green Shield Card**.



- Go to the **Employees** tab on the **Policy Information** page, locate the employee from the list and click on **Edit** on the right. Select **Order Green Shield Card**.



- At the top right of the **Employee Information** page, click on the down arrow from the **I would like to** drop-down list and select **Order Green Shield Card**.



## Updating Employee Information

- The **Confirmation** screen will appear. Click on the **Confirm>>** button to complete the request.

**Confirmation**

Please confirm that the information below is correct. Click on the "Confirm" button to submit the request.

**Effective Date:** Oct 12, 2012

New Green Shield card(s) will be mailed for ROMY RODRIGUEZ.

[Cancel](#) [Confirm >>](#)

- Once you click **Confirm>>**, the **Request Green Shield Cards Submitted** screen will appear. The new card(s) will be requested from Green Shield and then mailed out.

**Request GreenShield Cards Submitted (Confirmation code - 3151)**

**Status:** Completed  
**Reason for Change:** Request GreenShield Cards  
**Effective Date:** Oct 12, 2012

Green Shield card(s) have been requested.

[Return to Employee >>](#)

- On the employee's **History** tab, the Green Shield Card Request will be listed. You can click on **Details** to again view the **Request Green Shield Cards Submitted** screen.

Employee Info	Dependents	Beneficiaries	Coverage	History
Change Made		Effective Date	Status	Completed Date
Request GreenShield Cards (ROMY RODRIGUEZ)		Oct 12, 2012	Completed	Oct 12, 2012 <a href="#">Details</a>

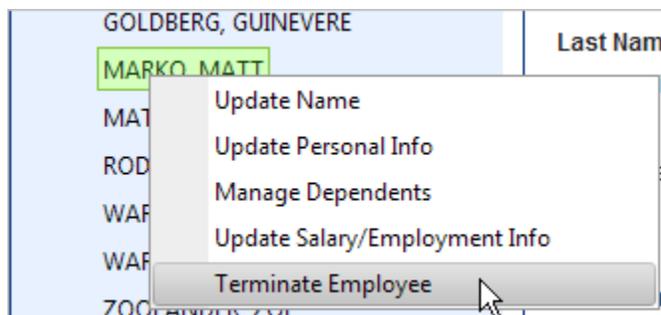
# Terminations

## Employee Terminations

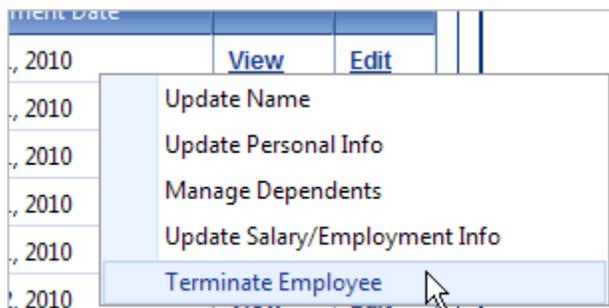
Employee terminations may be performed directly online. All active dependents for the employee will be terminated at the same time as the employee. If the effective date of the termination is more than 3 days in the future, the employee termination will immediately appear as **Completed**. If the effective date of the termination is in the past or within 3 days in the future, the status of the request will appear as **Pending** and it will be completed by your Insurance Advisor.

For further information regarding when an employee's coverage will terminate, please refer to the [Termination](#) section of your [Administration Guide](#).

1. To terminate an employee, there are 3 different ways to begin:
  - Right-click on the employee's name from the navigation pane and select **Terminate Employee**.



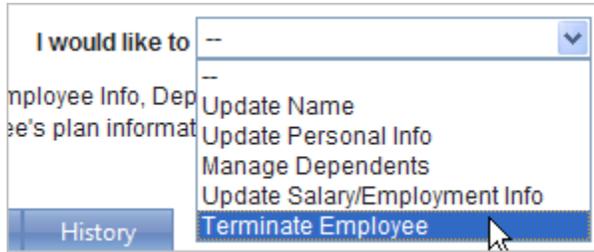
- Go to the **Employees** tab on the **Policy Information** page, locate the employee from the list and click on **Edit** on the right. Select **Terminate Employee**.



- At the top right of the **Employee Information** page, click on the down arrow from the **I would like to** drop-down list and select **Terminate Employee**.

## Terminations

---



2. You will be taken to the **Reason for Change** screen. Select the appropriate option from the list and click on **Next>>**.

A screenshot of the "Reason for Change" screen. The title "Reason for Change" is in blue. Below the title, it says "Select an option from below. Click the 'Next' button to continue." There are four radio button options: "Termination of Employment", "Layoff", "Death", and "No Longer Eligible". The "Termination of Employment" option is highlighted with a red box. At the bottom right, there are two buttons: a blue "<< Back" button and a green "Next >>" button, which is also highlighted with a red box.

3. In the **Effective Date** screen, enter the date of the **Last Day of Coverage** for the employee and click on **Next>>**. **Note:** You will not be able to enter a date more than 90 days in the future.

A screenshot of the "Effective Date" screen. The title "Effective Date" is in blue. Below the title, it says "Enter in the information below. Click the 'Next' button to continue." There is a date input field with the text "Effective Date:" followed by three input boxes containing "2010", "05", and "15", and a label "(yyyy/mm/dd)". The entire date input area is highlighted with a red box. At the bottom right, there are two buttons: a blue "<< Back" button and a green "Next >>" button, which is also highlighted with a red box.

- The **Confirmation** screen will appear next. If the employee has dependents, you will receive a warning at the bottom of the screen reminding you that the dependents will also be terminated.

**Confirmation**

Please confirm that the information below is correct. If any changes are required click on the "Edit" button. Click on the "Confirm" button to submit the request.

**Effective Date:** May 15, 2010  
**Reason for Change:** Termination of Employment

Listed employee will be marked as terminated.

- If you need to make any changes, click on **Edit** to go back to the **Reason for Change** screen.
  - If the information is correct, click on **Confirm>>** to continue with the termination.
- Once you click **Confirm>>**, the **Employee Terminate Submitted** screen will appear.
 

**Note:** If the effective date of the termination is more than 3 days in the future, the **Status** of the termination will appear as **Completed**. Otherwise, the **Status** of the termination will appear as **Pending** until it has been processed by your Insurance Advisor.

    - If the request was completed successfully, the **Status** of the employee termination will show as **Completed**. The terminated employee will no longer appear in the policy's active employee listing.

**Employee Terminate Submitted (Confirmation code - 2156)**

The transaction for MATT MARKO has been processed as of the effective date listed below. The updated information will be shown on the plan member's profile immediately.

**Status:** Completed  
**Reason for Change:** Termination of Employment  
**Effective Date:** May 15, 2010

Listed employee has been marked as terminated.

## Terminations

---

The **Status** of the employee termination may show as **Pending** if the effective date of the termination is in the past or within 3 days in the future. Once you have submitted the employee termination request, it will be completed by your Insurance Advisor. The terminated employee will still appear in the policy's active employee listing until the termination has been completed by your Insurance Advisor.

### Employee Terminate Submitted (Confirmation code - 2158)

Your request has been submitted to your Customer Service Representative for review and will be processed within 2 business days. Until your request has been finalized, the original information will appear on the plan member's profile. The requested date of termination will be adjusted if claims were paid after the last day worked or if the requested date is more than 90 days in the past. You will be advised in writing by your Customer Service Representative if the termination date is adjusted.

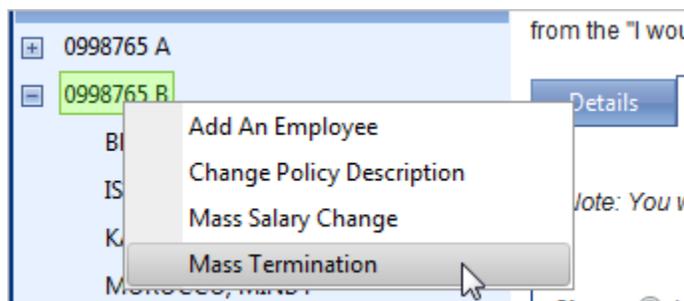
**Status:** Pending  
**Reason for Change:** Termination of Employment

Listed employee has been marked as terminated.

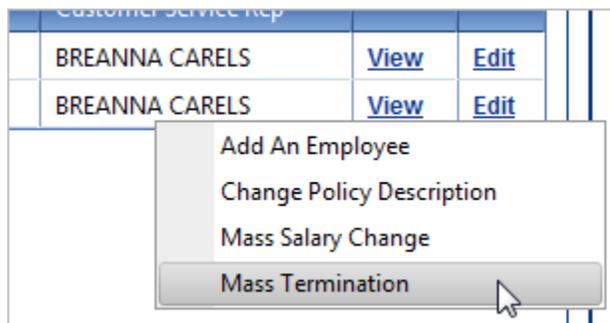
## Mass Employee Terminations

If there are several employee terminations to perform, they can be done online using the Mass Termination feature. All active dependents for the employee will be terminated at the same time as the employee. If the effective date of the termination is more than 3 days in the future, the employee termination will immediately appear as **Completed**. If the effective date of the termination is in the past or within 3 days in the future, the status of the request will appear as **Pending** and it will be completed by your Insurance Advisor.

1. To perform a mass employee termination, there are 3 different ways to begin:
  - a. Right-click on the Policy number/description from the navigation pane and select **Mass Termination** from the pop-up menu.

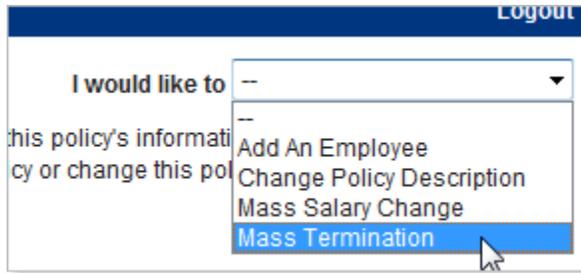


- b. While viewing the **Policies** tab from the **Account Information** page, locate the policy from the list and click on **Edit** to the right. Select **Mass Termination** from the pop-up menu.



- c. While viewing the **Policy Information** page, at the top right, click on the down arrow from the **I would like to** drop-down list and select **Mass Termination**.

## Terminations



2. You will be taken to the **Mass Termination** screen. The current employees will be listed.

Click the checkboxes in front of the employees to be terminated.

**Mass Termination - 913424**

You can terminate multiple employees by selecting the employees in the left-hand column and entering the information, including the last day worked, in the activated fields. Click the "Submit Change" button to continue.

	Name	Hire Date	Reason	Last Day Worked
<input checked="" type="checkbox"/>	BRADLEY, BENJAMIN	Feb 01, 1988	Termination of Employment	2012 / 05 / 04
<input type="checkbox"/>	ISAAK, ISABELLA	May 15, 2010	--	
<input checked="" type="checkbox"/>	KARMAN, KENNY	Jan 15, 1990	--	/ /
<input checked="" type="checkbox"/>	MOROCCO, MINDY	Aug 19, 2009	--	/ /
<input type="checkbox"/>	NORIS, NADINE	Oct 01, 2009	--	
<input type="checkbox"/>	RUSSELL, RICH	Sep 25, 2009	--	
<input type="checkbox"/>	WARMAN, WILLIAM	Mar 20, 2006	--	
<input type="checkbox"/>	WEBSTER, WILLIAM	Jan 02, 2007	--	

**Note:** The **P** symbol means that there is already a pending termination for the employee. You will not be able to select the employee, but you can click on the symbol to go to the **Employee Termination Submitted** screen and delete the request. You will also not be able to select employees on disability (has a **D** in front of their name) or those on survivor benefits (has an **S** in front of their name).

3. For each employee with a checkmark:
  - a. Select the **Reason** for termination.

	Name	Hire Date	Reason	Last Day Worked
<input type="checkbox"/>	BRADLEY, BENJAMIN	Feb 01, 1988	Termination of Employment	2012 / 05 / 04
<input type="checkbox"/>	ISAAK, ISABELLA	May 15, 2010	--	
<input checked="" type="checkbox"/>	KARMAN, KENNY	Jan 15, 1990	Termination of Employment	2013 / 04 / 20
<input checked="" type="checkbox"/>	MOROCCO, MINDY	Aug 19, 2009	Layoff	2013 / 05 / 01
<input type="checkbox"/>	.....	Oct 01		

- b. Enter the **Last Day Worked**.

**Note:** You will not be able to enter a date more than 90 days in the future.

4. Once the information has been entered for the selected employees, click on **Submit Change>>**.

2007

Cancel
Submit Change >>

5. In the **Confirmation** screen, just the employees that you selected for termination will be listed. Double check that all the information has been entered correctly.

**Confirmation**

Please confirm that the information below is correct. If any changes are required click on the "Edit" button. Click on the "Confirm" button to submit the request.

Name	Hire Date	Reason	Last Day Worked
KARMAN, KENNY	Jan 15, 1990	Termination of Employment	Apr 20, 2013
MOROCCO, MINDY	Aug 19, 2009	Layoff	May 01, 2013

Cancel
Edit
Confirm >>

- If you need to make any changes, click on **Edit** to go back to the **Mass Termination** edit screen.
- If the information is correct, click on **Confirm>>** to complete the terminations.

## Terminations

6. Once you click **Confirm>>**, the **Mass Termination Submitted** screen will appear. The status of each employee termination will appear in a column to the right. The overall status of all the terminations will appear at the top. If any of the employees have a status of **Pending**, the overall status will show as **Pending**.

**Note:** If the effective date of the termination is more than 3 days in the future, the **Status** of the termination will appear as **Completed**. Otherwise, the **Status** of the termination will appear as **Pending** until it has been processed by your Insurance Advisor.

**Status:** Completed

Name	Hire Date	Reason	Last Day Worked	Status
KENNY KARMAN	Jan 15, 1990	Termination of Employment	Apr 20, 2013	Completed
MINDY MOROCCO	Aug 19, 2009	Layoff	May 01, 2013	Completed

The following list is for your reference.  
*(You will need Adobe Acrobat to view and print documents. If you do not have Adobe Acrobat, you can download it free by clicking [here](#)).*

[View Summary of Coverage](#)



Click on the **View Summary of Coverage** link at the bottom to view an updated Summary of Coverage report for the entire policy.

7. On the *policy's* **History** tab, the mass employee termination will be listed. You can click on **Details** to again view the **Mass Termination Submitted** screen.

**Policy 0998765 B** I would like to

Listed below is information regarding this policy. Click on "Details" to view this policy's information. Click on "Employees" to view a list of employees in this policy. You can add an employee to this policy or change this policy's description by selecting from the "I would like to" drop down list above.

Details Employees **History**

**Show:**  
 Pending  Completed/Cancelled

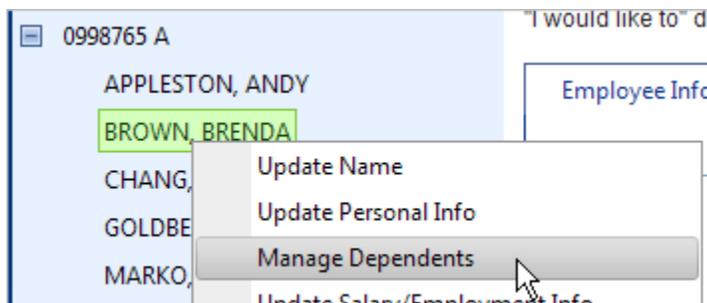
Transaction Type	Reason	Effective Date	Completed Date	Status	
• Mass Termination (Mass Termination)		Apr 15, 2013	Apr 15, 2013	Completed	<a href="#">Details</a>
-Employee Terminate (KENNY KARMAN)		Apr 20, 2013	Apr 15, 2013	Completed	
-Employee Terminate (MINDY MOROCCO)		May 01, 2013	Apr 15, 2013	Completed	
• Mass Salary Change (Mass Salary Change)		Apr 12, 2013	Apr 12, 2013	Completed	<a href="#">Details</a>
-Employment Info Change (ISABELLA ISAAK)		Apr 15, 2013	Apr 12, 2013	Completed	

## Dependent Terminations

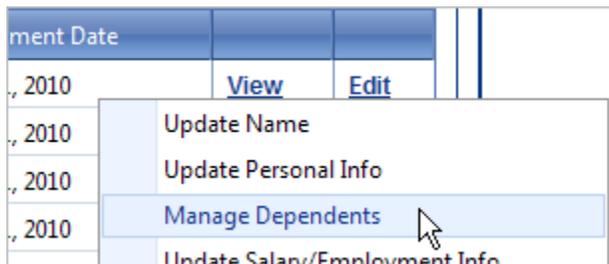
Dependent terminations may be performed directly online. If an employee has only one active dependent, their **Family Status** will automatically change to **Single** effective on the effective date of the dependent termination. If the effective date of the termination is more than 3 days in the future, the dependent termination will immediately appear as **Completed**. If the effective date of the termination is in the past or within 3 days in the future, the status of the request will appear as **Pending** and it will be completed by your Insurance Advisor.

1. To terminate a dependent, there are 3 different ways to begin:

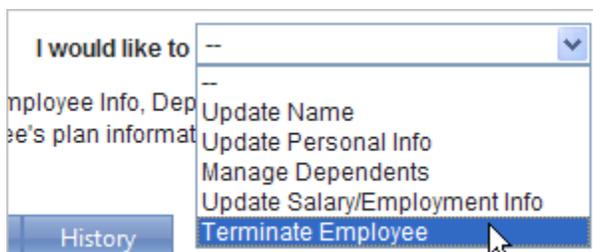
- Right-click on the employee name from the navigation pane and select **Manage Dependents**.



- Go to the **Employees** tab on the **Policy Information** page, locate the employee from the list and click on **Edit** on the right. Select **Manage Dependents**.



- At the top right of the **Employee Information** page, click on the down arrow from the **I would like to** drop-down list and select **Manage Dependents**.



## Terminations

- You will be taken to the **Manage Dependents** screen where all of the employee's current active dependents will be listed. Click on the **Terminate** link to the right of the dependent you wish to terminate.

**Manage Dependents - BRENDA BROWN**

Listed below is information regarding this employee's dependent(s). Click on the "Add Dependent" button to add a dependent.

Status	Name	Gender	Date of Birth	Relationship	Enrollment Date	Reason for Change	Effective Date of Change	Action
	ANNE BROWN	Female	Feb 11, 1991	Child	May 08, 2010	N/A	N/A	<a href="#">•Edit</a> <a href="#">•Terminate</a>

[Add Dependent](#)

[Return to Employee](#)

- You will be taken to the **Reason for Change** screen. Select the appropriate option from the selection below and click on **Next>>**.
  - If you are terminating a **Spouse**, you will see the following options:

**Reason for Change**

Select an option from below. Click the "Next" button to continue.

Divorce / Separation

Other

[<< Back](#) [Next >>](#)

- If you are terminating a **Child**, you will see the following options

**Reason for Change**

Select an option from below. Click the "Next" button to continue.

Child no longer eligible 

Other

[<< Back](#) [Next >>](#)

Children are no longer eligible to be covered on their parent's plan once they are working full-time, are married, or are living on their own.

- In the **Effective Date** screen, enter the date of the **Last Day of Coverage** for the dependent and click on **Next>>**.

**Last day of coverage**

Enter in the information below. Click the "Next" button to continue.

Last day of coverage: 2010 / 05 / 15 (yyyy/mm/dd)

<< Back      Next >>

- In the **Confirmation** screen, the dependent will now have a **Status** of **Terminated**. Click on **Confirm>>** to continue with the termination.

**Confirmation**

Please confirm that the information below is correct. If any changes are required click on the "Edit" button. Click on the "Confirm" button to submit the request.

**Last day of coverage:** May 15, 2010  
**Reason for Change:** Child no longer eligible

Listed below is information regarding this employee's dependent(s). Click on the "Add Dependent" button to add a dependent.

Status	Name	Gender	Date of Birth	Relationship	Enrollment Date	Reason for Change	Effective Date of Change	Action
Terminated	ANNE BROWN	Female	Feb 11, 1991	Child	May 08, 2010	Child no longer eligible	May 15, 2010	<a href="#">•Edit</a> <a href="#">•Terminate</a>

**Add Dependent**

Cancel      Confirm >>

- If you need to make any changes, re-click on the **Terminate** link to go back to the **Reason for Change** screen.
- If the information is correct, click on **Confirm>>** to continue with the termination.

## Terminations

6. Once you click **Confirm>>**, the **Manage Dependents Submitted** screen will appear.

**Note:** If the effective date of the termination is more than 3 days in the future, the **Status** of the termination will appear as **Completed**. Otherwise, the **Status** of the termination will appear as **Pending** until it has been processed by your Insurance Advisor.

- If the request was completed successfully, the **Status** of the dependent termination will show as **Completed**.

**Manage Dependents Submitted (Confirmation code - 2154)**

The transaction for ANNE BROWN has been processed as of the effective date listed below. The updated information will be shown on the plan member's profile immediately.

Edit Type	Name	Gender	Date of Birth	Relationship	Enrollment Date	Reason for Change	Effective Date of Change	Status
Dependent Terminate	ANNE BROWN	Female	Feb 11, 1991	Child	Jan 01, 2010	Child no longer eligible	May 15, 2010	Completed

Documents will be listed for your reference at the bottom of the page.

The following list is for your reference.

[Certificate of Insurance](#)  
[Summary of Coverage](#)

A Green Shield Identification card will follow in the next couple of weeks

[Return to Policy >>](#)

- Click on the **Certificate of Insurance** link to view an updated [Certificate of Insurance](#) for the employee.
- Click on the **Summary of Coverage** link to view an updated [Summary of Coverage](#) report for the employee.

- The **Status** of the dependent termination may show as **Pending** if the effective date of the termination is in the past or within 3 days in the future. Once you have submitted the dependent termination request, it will be completed by your Insurance Advisor.

**Manage Dependents Submitted (Confirmation code - 2162)**

Your request to terminate coverage for ANNE BROWN has been submitted to your Customer Service Representative for review and will be processed within 2 business days. Until your request has been finalized, the dependent will appear on the plan member's profile. The requested date of termination will be adjusted if claims were paid after requested termination date or if the request is more than 90 days in the past. You will be advised in writing by your Customer Service Representative if an adjustment is made to the termination date.

Edit Type	Name	Gender	Date of Birth	Relationship	Enrollment Date	Reason for Change	Effective Date of Change	Status
Dependent Terminate	ANNE BROWN	Female	Feb 11, 1991	Child	Jan 01, 2010	Child no longer eligible	May 01, 2010	Pending

- Once the dependent termination has been completed, if the **Family Status** of the employee automatically changed from **Family** to **Single**, any coverage changes will appear on the employee's **Coverage** tab. If the termination was effective on a past date, just the updated coverages will be listed on this tab. If the termination is effective for a future date, the old coverages will be listed in grey, and the updated coverages will be listed in black.

Employee Info	Dependents	Beneficiaries	Coverage	History
<a href="#">View Summary of Coverage</a> <a href="#">View Certificate of Insurance</a>				
Benefit	Effective Date	Expiration Date	Coverage	Premium
ACCIDENTAL DEATH & DISMEMBERMENT	Feb 01, 2010		\$54,000	\$ .
LONG TERM DISABILITY	Feb 01, 2010		\$1,500	\$ .
DENTAL	Jun 01, 2009	May 15, 2010	FAMILY	\$ .
DENTAL	May 15, 2010		SINGLE	\$ .
DEPENDANT LIFE	Jun 01, 2009	May 15, 2010	INCLUDED	\$ .
EXTENDED HEALTH BENEFITS	Jun 01, 2009	May 15, 2010	FAMILY	\$ .
EXTENDED HEALTH BENEFITS	May 15, 2010		SINGLE	\$ .
LIFE	Feb 01, 2010		\$54,000	\$ .
VISION	Jun 01, 2009	May 15, 2010	FAMILY	\$ .
VISION	May 15, 2010		SINGLE	\$ .
SHORT TERM DISABILITY	Feb 01, 2010		\$346	\$ .
<b>Total Premium</b>				<b>\$ .</b>

## Terminations

---

8. On the employee's **History** tab, the dependent termination will be listed. You can click on **Details** to again view the **Manage Dependents Submitted** screen.

Employee Info		Dependents	Beneficiaries	Coverage	History
Change Made		Effective Date	Status	Completed Date	
Employee Name Change (BRENDA BROWN)		Apr 30, 2010	Completed	Apr 30, 2010	<a href="#">Details</a>
Manage Dependents (BRENDA BROWN)		May 11, 2010	Completed	May 11, 2010	<a href="#">Details</a>

# Reinstatements

## Employee Reinstatements

Terminated employees who were previously on our plan may be reinstated directly online. All dependents that were previously active on the employee's plan will be reinstated at the same time as the employee.

1. To reinstate an employee, there are 3 different ways to begin:

- Click on the **Employee Search** page to search for the employee. In the search results, for terminated employees, you can click on **Reinstate** to the right of the employee.

Search Results						
Name	ID #	Date of Birth	Enrollment Date	Termination Date		
IRELAND, IRENE	0	Jan 27, 1976	Oct 06, 2008	Jun 01, 2010	<a href="#">View</a>	<a href="#">Reinstate</a>
IRELAND, ISABELLA	0	Jun 18, 1978	Aug 15, 2010	Aug 15, 2010	<a href="#">View</a>	<a href="#">Reinstate</a>

- Go to the **Employees** tab on the **Policy Information** page then select **Inactive Employees** to view the list of terminated employees. Click on **Reinstate** to the right of the employee.

Show: <input type="radio"/> Active Employees <input checked="" type="radio"/> Inactive Employees						
Name	ID #	Date of Birth	Enrollment Date	Termination Date		
IRELAND, IRENE	919999	Jan 27, 1976	Oct 06, 2008	Jun 01, 2010	<a href="#">View</a>	<a href="#">Reinstate</a>
IRELAND, ISABELLA	161477	Jun 18, 1978	Aug 15, 2010	Aug 15, 2010	<a href="#">View</a>	<a href="#">Reinstate</a>
ISAAK, ISABELLA	161483	Jun 18, 1978	Jun 15, 2010	Jun 15, 2010	<a href="#">View</a>	<a href="#">Reinstate</a>

- At the top right of the **Employee Information** page, click on the down arrow from the **I would like** to drop-down list and select **Reinstate Employee**.

I would like to    
Employee Info, Dependents, B...  
e's plan information by sele [Reinstate Employee](#)

## Reinstatements

- You will be taken to the **Employee Reinstatement** screen. The previous salary information will be listed. Update this information as required then click on **Next>>**.

### Employee Reinstatement - IRELAND, IRENE

To reinstate this employee, please verify the information below and make any necessary changes. Click the "Next" button to continue.

	Original Information	New Information
Date Hired:	Oct 06, 2008	Oct 06, 2008
Employee Class:		Hourly Employees ▾
Employee Status:	Employee	Employee ▾
Occupation:	OFFICE MANAGER	OFFICE MANAGER
Income:	\$19.00 Hourly	21.0 Income Period: Hourly ▾
Hours Worked per Week:	30	30
Months Worked per Year:	12	12

- In the **Return to Work Date** screen, enter the date the employee will be returning to work and click on **Next>>**. **Note:** You will only be able to enter a return to work date that is equal to or later than the employee's previous termination date.

### Return to Work Date

Enter in the information below. Click the "Next" button to continue.

Return to Work Date: 2012 / 11 / 01 (yyyy/mm/dd) ?

4. The **Confirmation** screen will appear next.

**Confirmation**

Please confirm that the information below is correct. If any changes are required click on the "Edit" button. Click on the "Confirm" button to submit the request.

**Return to Work Date:** Nov 01, 2012  
**Reason for Change:** Returned to Work

	Original Information	New Information
<b>Date Hired:</b>	Oct 06, 2008	Oct 06, 2008
<b>Employee Class:</b>		Hourly Employees
<b>Employee Status:</b>	Employee	Employee
<b>Occupation:</b>	OFFICE MANAGER	OFFICE MANAGER
<b>Income:</b>	\$19.00 Hourly	\$21.00 Hourly
<b>Hours Worked per Week:</b>	30	30.0
<b>Months Worked per Year:</b>	12	12

- If you need to make any changes, click on **Edit** to go back to the **Employee Reinstatement** screen.
  - If the information is correct, click on **Confirm>>** to continue with the reinstatement.
5. Once you click **Confirm>>**, the **Employee Reinstatement Submitted** screen will appear.
- If the request was completed successfully, the **Status** of the employee reinstatement will show as **Completed**. The **Date Hired** will be updated with the new return to work date and the **Effective Date** will be automatically calculated based on the employee information provided and the waiting period for the policy. The reinstated employee will now appear in the policy's active employee listing.

### Employee Reinstatement Submitted (Confirmation code - 3417)

The transaction for IRENE IRELAND has been processed as of the effective date listed below. The updated information will be shown on the plan member's profile immediately.

**Status:** Completed  
**Reason for Change:** Returned to Work  
**Effective Date:** Feb 01, 2013

#### New Information

**Date Hired:** Nov 01, 2012  
**Employee Class:** Hourly Employees  
**Employee Status:** Employee  
**Occupation:** OFFICE MANAGER  
**Income:** \$21.00 Hourly  
**Hours Worked per Week:** 30  
**Months Worked per Year:** 12

Documents will be listed for your reference at the bottom of the page.

The following list is for your reference.

*(You will need Adobe Acrobat to view and print documents. If you do not have Adobe Acrobat, you can download it free by clicking [here](#)).*

[View Certificate of Insurance](#)

[View Summary of Coverage](#)

A Green Shield Identification card will follow in the next couple of weeks

IRENE IRELAND (LONG TERM DISABILITY 1821) is eligible for excess insurance. To maintain the proper amount of coverage please have the plan member complete the [Application for Excess Coverage](#) form and return it to your Customer Service Representative.

[Return to Employee >>](#)

- Click on the **Certificate of Insurance** link to view a [Certificate of Insurance](#) for the new employee.
- Click on the **Summary of Coverage** link to view a [Summary of Coverage](#) report for the new employee.
- If the plan member is eligible for excess Life or Disability Insurance Coverage, above the plan's *Non-Evidence Limit*, it will also be mentioned at the bottom of the reference list. The employee will need to complete the **Application for Excess Coverage** form. Once it has been completed, you will need to send it your Insurance Advisor. Click on the link provided to save or print a copy of the form for the employee.

- The **Status** of the employee reinstatement may show as **Pending** if there is additional information that is required before the request can be completed. If any documents/forms are required before the request can be finalized, they will be listed at the top of the screen. The employee will not appear in the policy's active employee listing until the required documents/forms have been completed and returned to your Insurance Advisor.

**Employee Reinstatement Submitted (Confirmation code - 3468)**

 **Before this request can be finalized you must complete the following requirements.**

The application for coverage for JOE IRELAND was submitted more than 31 days from the date of eligibility and is considered late. To be considered for coverage, please have the applicant complete the [Evidence of Insurability](#) form and return it to your Customer Service Representative.

**Status:** Pending  
**Reason for Change:** Returned to Work

- Once completed and the new enrolment date has passed, the employee will again appear in the policy's active employee listing. On the **Coverage** tab, all the applicable coverages will have been automatically added based on the employee information provided and the standard coverages for your policy.

Benefit	Effective Date	Expiration Date	Coverage	Premium
ACCIDENTAL DEATH & DISMEMBERMENT	May 01, 2010		\$52,000	\$ .
LONG TERM DISABILITY	May 01, 2010		\$1,445	\$ .
DENTAL	May 01, 2010		FAMILY	\$ .
DEPENDANT LIFE	May 01, 2010		INCLUDED	\$ .
EXTENDED HEALTH CARE	May 01, 2010		FAMILY	\$ .
LIFE	May 01, 2010		\$52,000	\$ .
VISION	May 01, 2010		FAMILY	\$ .
SHORT TERM DISABILITY	May 01, 2010		\$300	\$ .
<b>Total Premium</b>				<b>\$ .</b>

**Note:** As mentioned in the previous step, if the employee is now eligible for excess Life or Disability Insurance Coverage, the coverage amounts may have only been initially set at the plan's *Non-Evidence*

## Reinstatements

---

*Limits.* An Application for Excess Coverage will need to be completed and approved before the coverages will increase to the eligible amounts.

7. On the employee's **History** tab, the employee reinstatement will be listed. You can click on **Details** to again view the **Employee Reinstatement Submitted** screen.

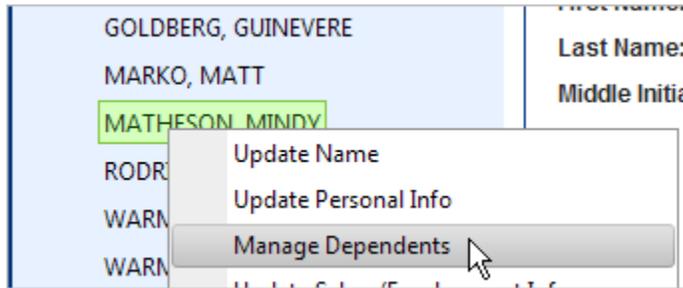
Employee Info	Dependents	Beneficiaries	Coverage	History	
Change Made	Effective Date	Status	Completed Date		
Employee Reinstatement (IRENE IRELAND)	Feb 01, 2013	Completed	Jan 23, 2013	<a href="#">Details</a>	
-Employment Info Change (IRENE IRELAND)	Feb 01, 2013	Completed	Jan 23, 2013		
-Dependent Reinstatement (KATE IRELAND)	Feb 01, 2013	Completed	Jan 23, 2013		

## Dependent Reinstatements

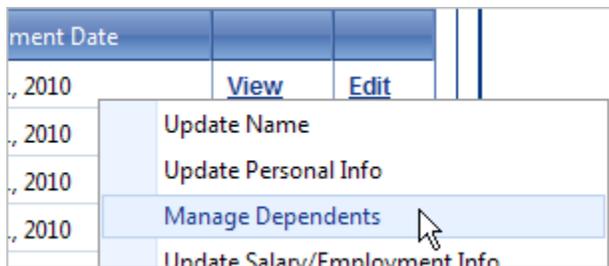
Terminated dependents who were previously on an employee's plan may be reinstated directly online.

1. To reinstate a dependent, there are 3 different ways to begin:

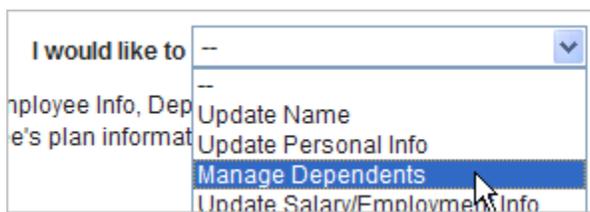
- Right-click on the employee name from the navigation pane and select **Manage Dependents**.



- Go to the **Employees** tab on the **Policy Information** page, locate the employee from the list and click on **Edit** on the right. Select **Manage Dependents**.



- At the top right of the **Employee Information** page, click on the down arrow from the **I would like to** drop-down list and select **Manage Dependents**.



## Reinstatements

- You will be taken to the **Manage Dependents** screen where all of the employee's previous dependents will be listed in grey. Click on the **Reinstate** link to the right of the inactive dependent you wish to reinstate.

**Manage Dependents - NADINE NORIS**

Listed below is information regarding this employee's dependent(s). Click on the "Add Dependent" button to add a dependent.

Status	Name	Gender	Date of Birth	Relationship	Enrollment Date	Reason for Change	Effective Date of Change	Action
	NICK NORIS	Male	Aug 21, 1979	Spouse	Apr 01, 2010	N/A	N/A	<a href="#">Reinstate</a>
	NICOLE NORIS	Female	May 05, 2005	Child	May 15, 2010	N/A	N/A	<a href="#">Edit</a> <a href="#">Terminate</a>

[Add Dependent](#)

- In the next screen, select the reason for the dependent addition and click on **Next>>**.
  - If you are reinstating a **Spouse**, you will see the following options:

**Reason for Change**

Select an option from below. Click the "Next" button to continue.

Marriage

Common Law ?

Loss of Similar Coverage ?

Other

[<< Back](#) [Next >>](#)

- If you are reinstating a **Child**, you will see the following options:

**Reason for Change**

Select an option from below. Click the "Next" button to continue.

Marriage

Common Law ?

Loss of Similar Coverage ?

Child over 21 returning to school ?

Child under 21 years returned home ?

Other

[<< Back](#) [Next >>](#)

4. You will be asked to enter a date depending on what reason was selected in the previous screen. Enter the required date and click on **Next>>**.

**Effective Date**

Enter in the information below. Click the "Next" button to continue.

Effective Date: 2013 / 02 / 01 (yyyy/mm/dd)

<< Back      Next >>

5. The **Confirmation** screen will appear next.

**Confirmation**

Please confirm that the information below is correct. Click on the "Confirm" button to submit the request.

Listed below is information regarding this employee's dependent(s). Click on the "Add Dependent" button to add a dependent.

Status	Name	Gender	Date of Birth	Relationship	Enrollment Date	Reason for Change	Effective Date of Change	Action
Reinstated	NICK NORIS	Male	Aug 21, 1979	Spouse	Apr 01, 2010	Other	Feb 01, 2013	<a href="#">Reinstate</a>
	NICOLE NORIS	Female	May 05, 2005	Child	May 15, 2010	N/A	N/A	<a href="#">Edit</a> <a href="#">Terminate</a>

**Add Dependent**

Cancel      Confirm >>

- If you need to make any changes, click on **Reinstate** to go back to the **Reason for Change** screen.
- If the information is correct, click on **Confirm>>** to continue with the reinstatement.

## Reinstatements

6. Once you click **Confirm>>**, the **Manage Dependents Submitted** screen will appear.
  - If the request was completed successfully, the **Status** of the dependent reinstatement will show as **Completed**. The **Effective Date** will be automatically calculated based on the dependent information provided. The reinstated dependent will now appear as active in the employee's dependent listing.

### Manage Dependents Submitted (Confirmation code - 3463)

The transaction for AVERY SHEPPARD has been processed as of the effective date listed below. The updated information will be shown on the plan member's profile immediately.

Edit Type	Name	Gender	Date of Birth	Relationship	Enrollment Date	Reason for Change	Effective Date of Change	Status
Dependent Reinstatement	AVERY NORIS	Female	May 09, 2002	Child	Feb 01, 2013	Marriage	Feb 01, 2013	Completed

Documents will be listed for your reference at the bottom of the page.

The following list is for your reference.

*(You will need Adobe Acrobat to view and print documents. If you do not have Adobe Acrobat, you can download it free by clicking [here](#)).*

[View Certificate of Insurance](#)

[View Summary of Coverage](#)

A Green Shield Identification card will follow in the next couple of weeks

[Return to Policy >>](#)

- Click on the **Certificate of Insurance** link to view a Certificate of Insurance for the new employee.
- Click on the **Summary of Coverage** link to view a Summary of Coverage report for the new employee.

- The **Status** of the employee reinstatement may show as **Pending** if there is additional information that is required before the request can be completed. The dependent will not appear in the employee's active dependent listing until completed by your Customer Service Representative.

**Manage Dependents Submitted (Confirmation code - 3419)**

Your request requires additional information; please contact your Customer Service Representative to proceed with this request.

Edit Type	Name	Gender	Date of Birth	Relationship	Enrollment Date	Reason for Change	Effective Date of Change	Status
Dependent Reinstatement	NICK NORIS	Male	Aug 21, 1979	Spouse	Feb 01, 2013	Other	Feb 01, 2013	Pending

[Return to Employee >>](#)

- Once completed, if the reinstatement will change the employee's Family status, all the applicable coverages will be automatically updated on the **Coverage** tab based on the employee information provided and the standard coverages for your policy.

Employee Info	Dependents	Beneficiaries	Coverage	History
<a href="#">View Certificate of Insurance</a> <a href="#">View Summary of Coverage</a> (Note: You will need Adobe Reader to view and print the above links. If you do not have Adobe Reader, you can download it free by clicking <a href="#">here</a> .)				
Benefit	Effective Date	Expiration Date	Coverage	Premium
ACCIDENTAL DEATH & DISMEMBERMENT	May 01, 2010		\$52,000	\$ .
LONG TERM DISABILITY	May 01, 2010		\$1,445	\$ .
DENTAL	Feb 01, 2013		FAMILY	\$ .
DEPENDANT LIFE	Feb 01, 2013		INCLUDED	\$ .
EXTENDED HEALTH CARE	Feb 01, 2013		FAMILY	\$ .
LIFE	May 01, 2010		\$52,000	\$ .
VISION	Feb 01, 2013		FAMILY	\$ .
SHORT TERM DISABILITY	May 01, 2010		\$300	\$ .
<b>Total Premium</b>				<b>\$ .</b>

## Reinstatements

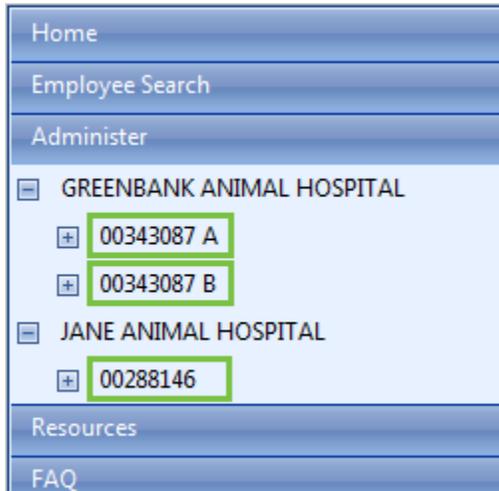
---

8. On the employee's **History** tab, the dependent reinstatement will be listed. You can click on **Details** to again view the **Manage Dependents Submitted** screen.

Employee Info	Dependents	Beneficiaries	Coverage	History	
Change Made		Effective Date	Status	Completed Date	
Manage Dependents (NADINE NORIS)		Jan 29, 2013	Pending	-	<a href="#">Details</a>
-Dependent Reinstatement (NICK NORIS)		Feb 01, 2013	Pending	-	

## Employee Transfers

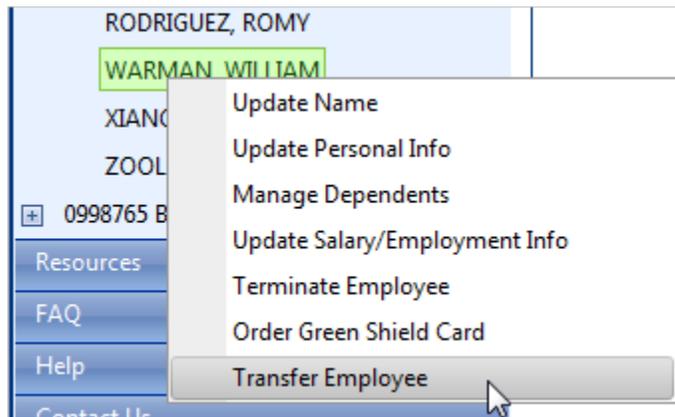
If you are the administrator for more than one policy, you are able to transfer an employee between policies using online administration.



If you administer more than one company account online and/or there are multiple policies per account, you can transfer an employee between any of the listed policies.

1. To transfer an employee, there are 3 different ways to begin:

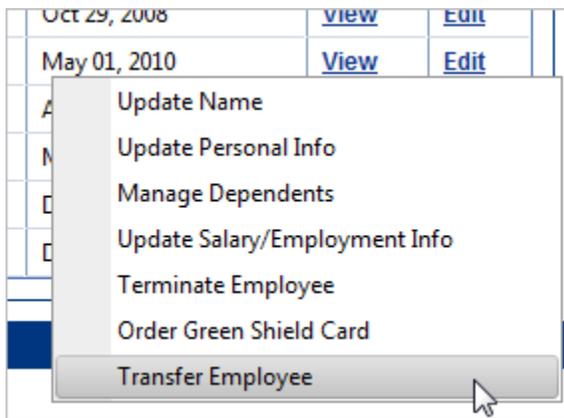
- Right-click on the employee's name from the navigation pane and select **Transfer Employee**.



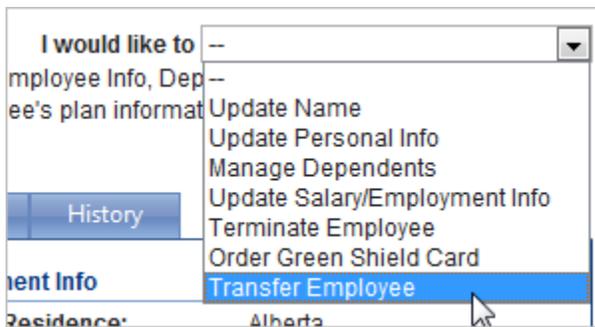
## Transfers

---

- Go to the **Employees** tab on the **Policy Information** page, locate the employee from the list and click on **Edit** on the right. Select **Transfer Employee**.



- At the top right of the **Employee Information** page, click on the down arrow from the **I would like to** to drop-down list and select **Transfer Employee**.



2. You will be taken to the **Employee Transfer** screen. The current salary information will be listed on the left.
  - a. Select the **Customer** name and **Transfer to Policy** as required.
  - b. You will need to select the **Employee Status** as the allowable options may change between policies.
  - c. Update the other salary information as required.
  - d. Click on **Next>>**.

### Employee Transfer - WARMAN, WILLIAM

To transfer this employee, select the new customer / policy information from the drop-down lists in the "New Information" column and make any necessary changes to the employee's employment information. Once complete, click the "Next" button to continue.

	Original Information	New Information
Customer:	PURPLEWOOD INN	PURPLEWOOD INN <input type="text"/>
Transfer to Policy:	0998765 A	0998765 B <input type="text"/>
Date Hired:	Mar 20, 2006	Mar 20, 2006
Employee Status:	Employee	Employee <input type="text"/>
Occupation:	QA. MAN.	QA. MAN. <input type="text"/>
Income:	\$50,000.00 Annual	50,000.00 <input type="text"/> Income Period: Annual <input type="text"/>
Hours Worked per Week:	40	40 <input type="text"/>
Months Worked per Year:	12	12 <input type="text"/>
Province of Residence:	Alberta	Alberta <input type="text"/>
Employee Class:		Salary Employees <input type="text"/>

3. In the **Effective Date** screen, enter the date the employee will be enrolled on the new policy and click on **Next>>**. **Note:** You will only be able to enter a date within 366 days in the past or 120 days in the future.

### Effective Date

Enter in the information below. Click the "Next" button to continue.

Effective Date: 2013 / 02 / 15 (yyyy/mm/dd)

## Transfers

---

4. The **Confirmation** screen will appear next.

### Confirmation

Please confirm that the information below is correct. If any changes are required click on the "Edit" button. Click on the "Confirm" button to submit the request.

**Effective Date:** Feb 15, 2013  
**Reason for Change:** Employee Transfer To Policy

	<u>Original Information</u>	<u>New Information</u>
<b>Customer:</b>	PURPLEWOOD INN	PURPLEWOOD INN
<b>Transfer to Policy:</b>	0998765 A	0998765 B
<b>Date Hired:</b>	Mar 20, 2006	Mar 20, 2006
<b>Employee Status:</b>	Employee	Employee
<b>Occupation:</b>	QA. MAN.	QA. MAN.
<b>Income:</b>	\$50,000.00 Annual	\$50,000.00 Annual
<b>Hours Worked per Week:</b>	40	40.0
<b>Months Worked per Year:</b>	12	12
<b>Province of Residence:</b>	Alberta	Alberta
<b>Employee Class:</b>		Salary Employees

- If you need to make any changes, click on **Edit** to go back to the **Employee Transfer** screen.
- If the information is correct, click on **Confirm>>** to continue with the transfer.

5. Once you click **Confirm>>**, the **Manage Employee Transfer Submitted** screen will appear.
- If the request was completed successfully, the **Status** of the employee transfer will show as **Completed**. The transferred employee will now appear in the new policy's active employee listing.

**Manage Employee Transfer Submitted (Confirmation code - 3461)**

The transaction for WILLIAM WARMAN has been processed as of the effective date listed below. The updated information will be shown on the plan member's profile immediately.

<b>Status:</b>	Completed
<b>Reason for Change:</b>	Manage Employee Transfer
<b>Effective Date:</b>	Feb 15, 2013

<b>Information to be Updated</b>	
<b>Customer:</b>	PURPLEWOOD INN
<b>Transfer to Policy:</b>	0998765 B
<b>Date Hired:</b>	Mar 20, 2006
<b>Employee Status:</b>	Employee
<b>Occupation:</b>	QA. MAN.
<b>Income:</b>	\$50,000.00 Annual
<b>Hours Worked per Week:</b>	40
<b>Months Worked per Year:</b>	12
<b>Province of Residence:</b>	Alberta
<b>Employee Class:</b>	Salary Employees

Documents will be listed for your reference at the bottom of the page.

**The following list is for your reference.**

*(You will need Adobe Acrobat to view and print documents. If you do not have Adobe Acrobat, you can download it free by clicking [here](#)).*

[View Certificate of Insurance](#)  
[View Summary of Coverage](#)

WILLIAM WARMAN (LONG TERM DISABILITY 2778) is eligible for excess insurance. To maintain the proper amount of coverage please have the plan member complete the [Application for Excess Coverage](#) form and return it to your Customer Service Representative.

[Return to Policy >>](#)

- Click on the **Certificate of Insurance** link to view a Certificate of Insurance for the new employee.
- Click on the **Summary of Coverage** link to view a Summary of Coverage report for the new employee.

## Transfers

- If the plan member is eligible for excess Life or Disability Insurance Coverage, above the plan's *Non-Evidence Limit*, it will also be mentioned at the bottom of the reference list. The employee will need to complete the **Application for Excess Coverage** form. Once it has been completed, you will need to send it your Customer Service Representative. Click on the link provided to save or print a copy of the form for the employee.
  - The **Status** of the employee transfer may show as **Pending** if the effective date for the request is greater than 31 days in the past or 90 days in the future. The employee will not appear in the new policy's active employee listing until it has been completed by your Customer Service Representative.
6. Once completed, the employee will appear in the new policy's active employee listing. On the **Coverage** tab, all the applicable coverages will have been automatically added based on the employee information provided and the standard coverages for your policy.

Employee Info	Dependents	Beneficiaries	Coverage	History
<a href="#">View Certificate of Insurance</a> <a href="#">View Summary of Coverage</a> (Note: You will need Adobe Reader to view and print the above links. If you do not have Adobe Reader, you can download it free by clicking <a href="#">here</a> .)				
Benefit	Effective Date	Expiration Date	Coverage	Premium
ACCIDENTAL DEATH & DISMEMBERMENT	May 01, 2010		\$52,000	\$ .
LONG TERM DISABILITY	May 01, 2010		\$1,445	\$ .
DENTAL	May 01, 2010		FAMILY	\$ .
DEPENDANT LIFE	May 01, 2010		INCLUDED	\$ .
EXTENDED HEALTH CARE	May 01, 2010		FAMILY	\$ .
LIFE	May 01, 2010		\$52,000	\$ .
VISION	May 01, 2010		FAMILY	\$ .
SHORT TERM DISABILITY	May 01, 2010		\$300	\$ .
<b>Total Premium</b>				<b>\$ .</b>

**Note:** As mentioned in the previous step, if the employee is now eligible for excess Life or Disability Insurance Coverage, the coverage amounts may have only been initially set at the plan's *Non-Evidence Limits*. An Application for Excess Coverage will need to be completed and approved before the coverages will increase to the eligible amounts.