# Online Administration Web Site Manual

Western
FINANCIAL GROUP
Canada's Insurance Broker

Western Financial Group (Network) Inc.

# 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.

# Index

# Introduction to Online Administration

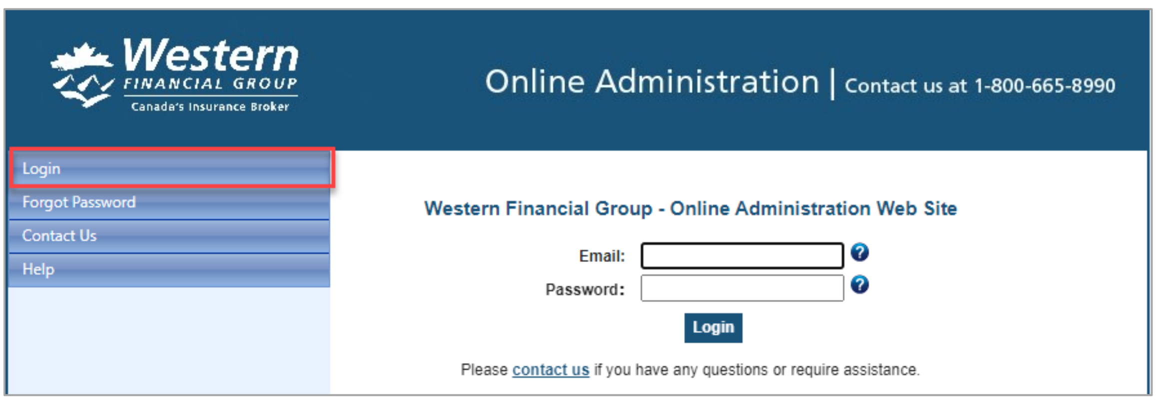
## Account Creation

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.

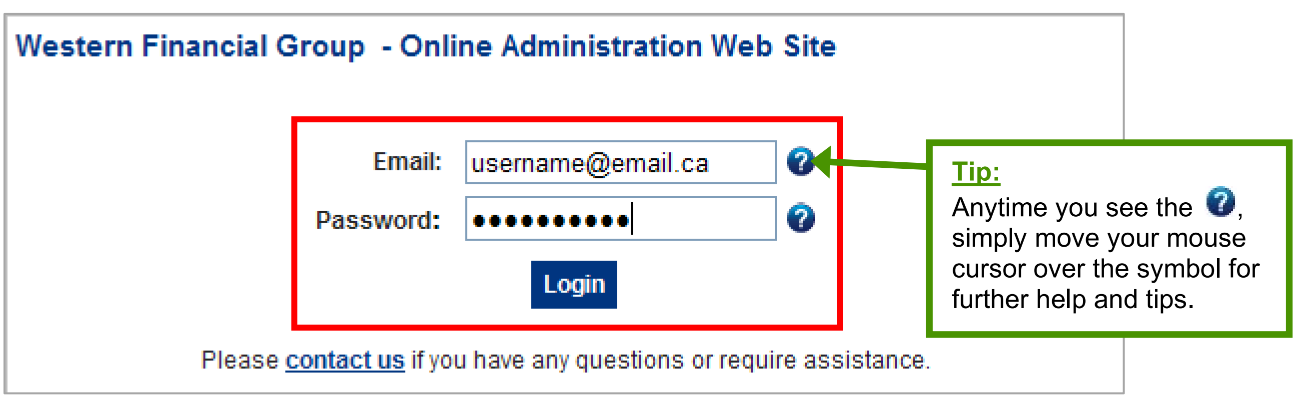
## Logging In

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.

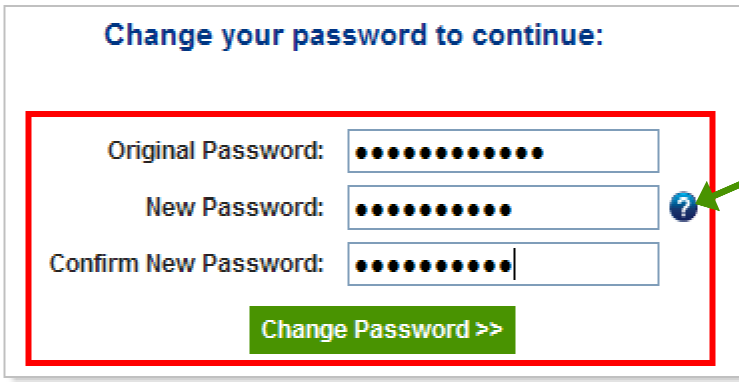



3. You will need to enter your full **Email** address and then your initial **Password** which was supplied to you in the email. Once you've done this, click **Login**.



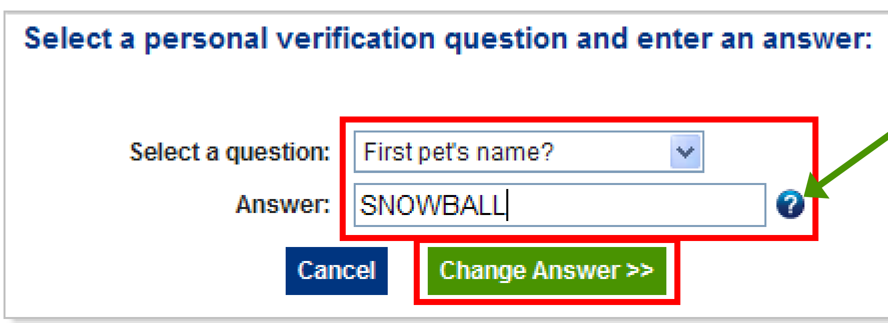
4. Once you log in for the first time, you will need to select a new personalized password. Enter the **Original Password** in the first textbox. Next, enter your new password in the **New Password** and in the **Confirm New Password** textboxes.

   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.



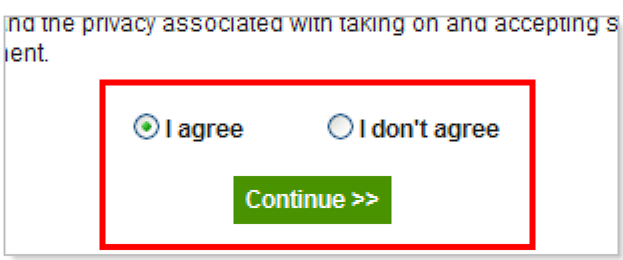

Must contain at least 8 characters long, a mix of lowercase and uppercase letters, and at least one numerical digit.

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**.




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**.

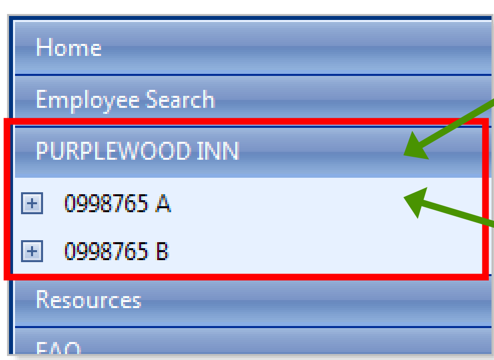



7. You will then be taken to the **Home** page of your Online Administration Web Site account.

## 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*.

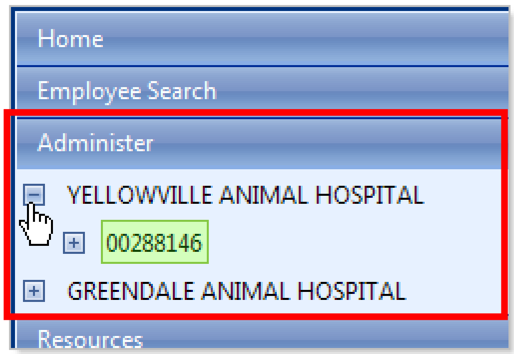

From the navigation pane, you will be able to click on the account/company name or a policy number to view and update information.



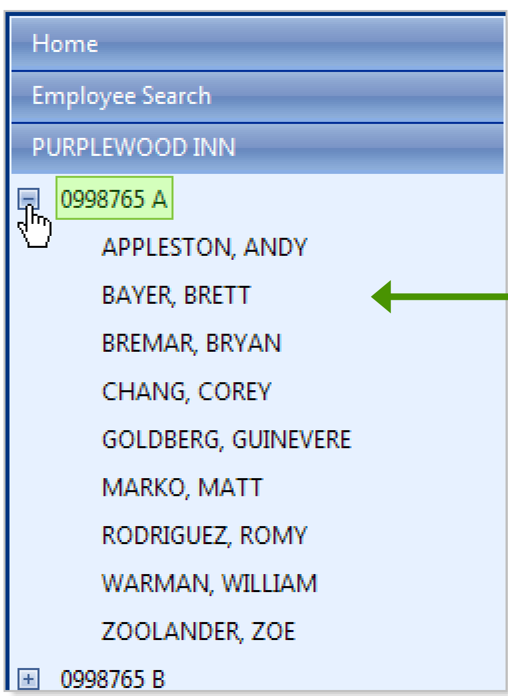

**Click on the company name** to view information regarding the account, including the mailing contact information and a list of policies.

**Click on a policy** to view information regarding the policy, including the policy details and a list of employees.

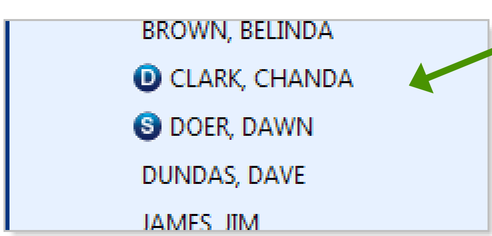
**Note:** If you administer more than one company online, they will both be shown on the navigation pane under the **Administer** heading. You can click on the plus symbol, , in front of a company name to view a list of all active policies for the particular account.




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.



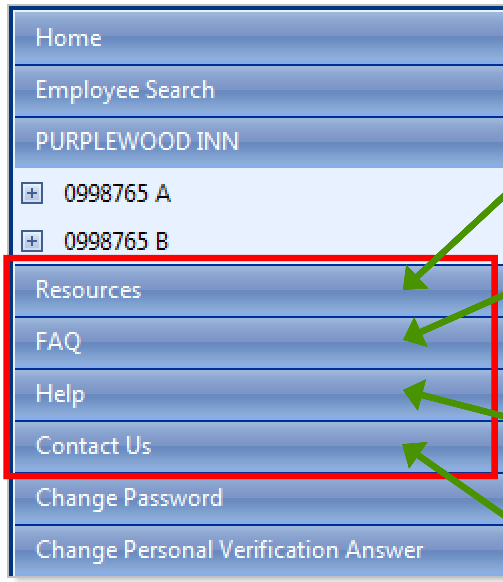

If an employee has a D in front of their name, this shows that they are currently on **disability**.

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.




**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.

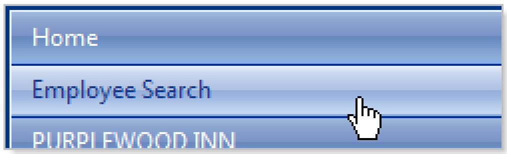
**Click on Contact Us** to view general contact information for Western Financial Group. From here, you can also access the department listing for the Employee Benefits Service Centre and find contact information for your Insurance Advisor.

**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.

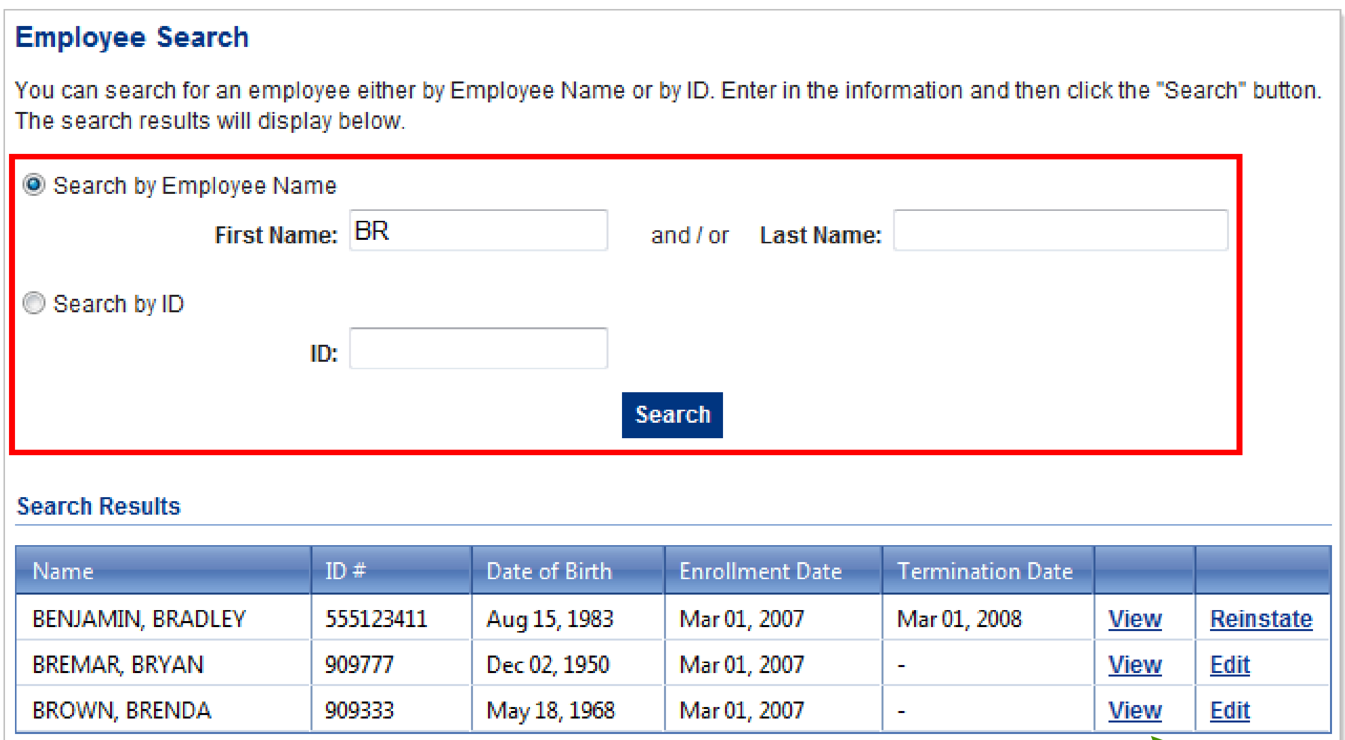



2. You may search for an employee by either their name or their ID number.

   - To **Search by Employee Name**, enter the **First Name** and/or the **Last Name** in the first two textboxes.  You may just enter the <u>first few characters</u> 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 <u>full number</u> 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.



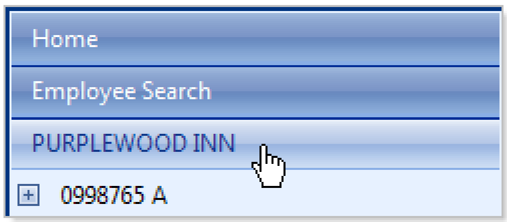

| Name | ID # | Date of Birth | Enrollment Date | Termination Date | | |
|---|---|---|---|---|---|---|
| BENJAMIN, BRADLEY | 555123411 | Aug 15, 1983 | Mar 01, 2007 | Mar 01, 2008 | View | Reinstate |
| BREMAR, BRYAN | 909777 | Dec 02, 1950 | Mar 01, 2007 | - | View | Edit |
| BROWN, BRENDA | 909333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

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.



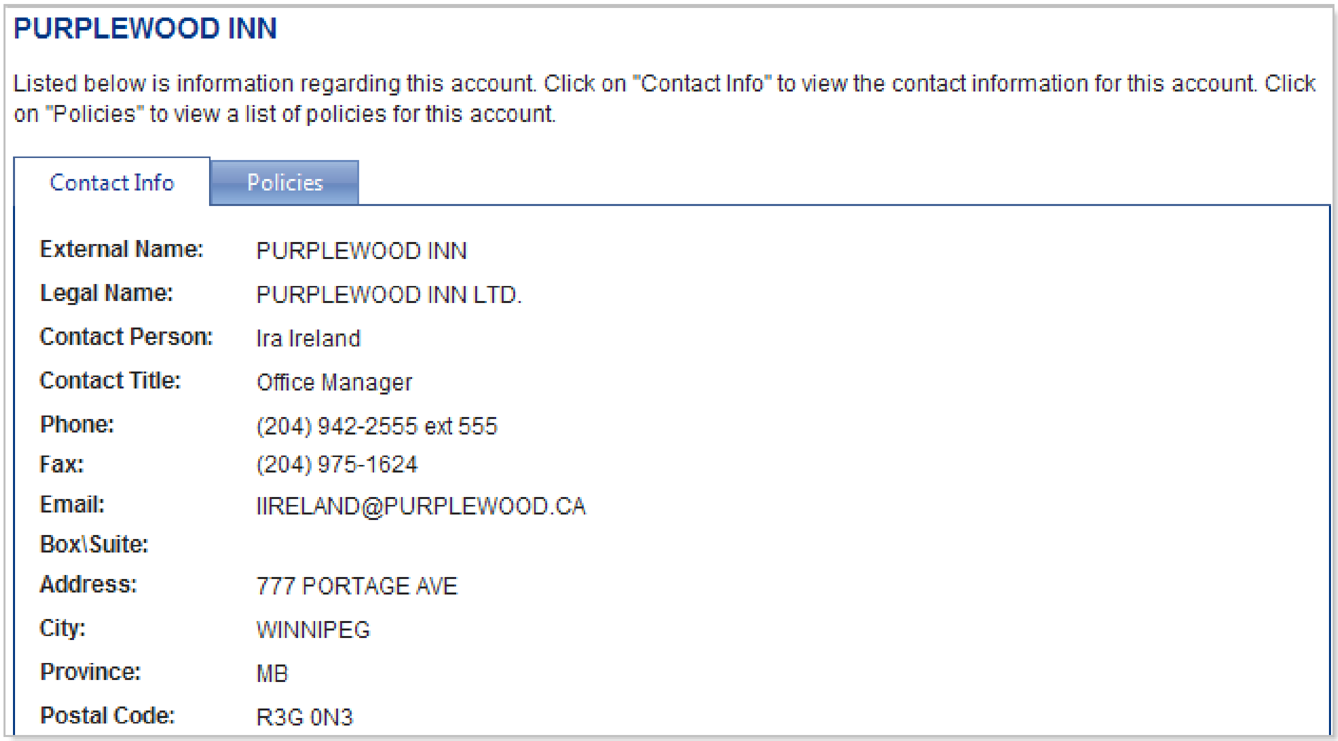

- Click on the **Policies** tab to view a list of all policies under this account.

  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.


| Policy Number | Description | # Employees | Effective Date | Customer Service Rep | | |
|---|---|---|---|---|---|---|
| 0998765 A | | 9 | Mar 01, 2007 | BREANNA CARELS | View | Edit |
| 0998765 B | | 9 | Nov 01, 2009 | BREANNA CARELS | View | Edit |

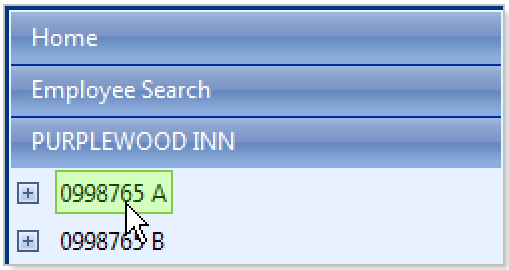
- Click on the **Contact Info** tab to view the mailing contact information for this account.

  **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.



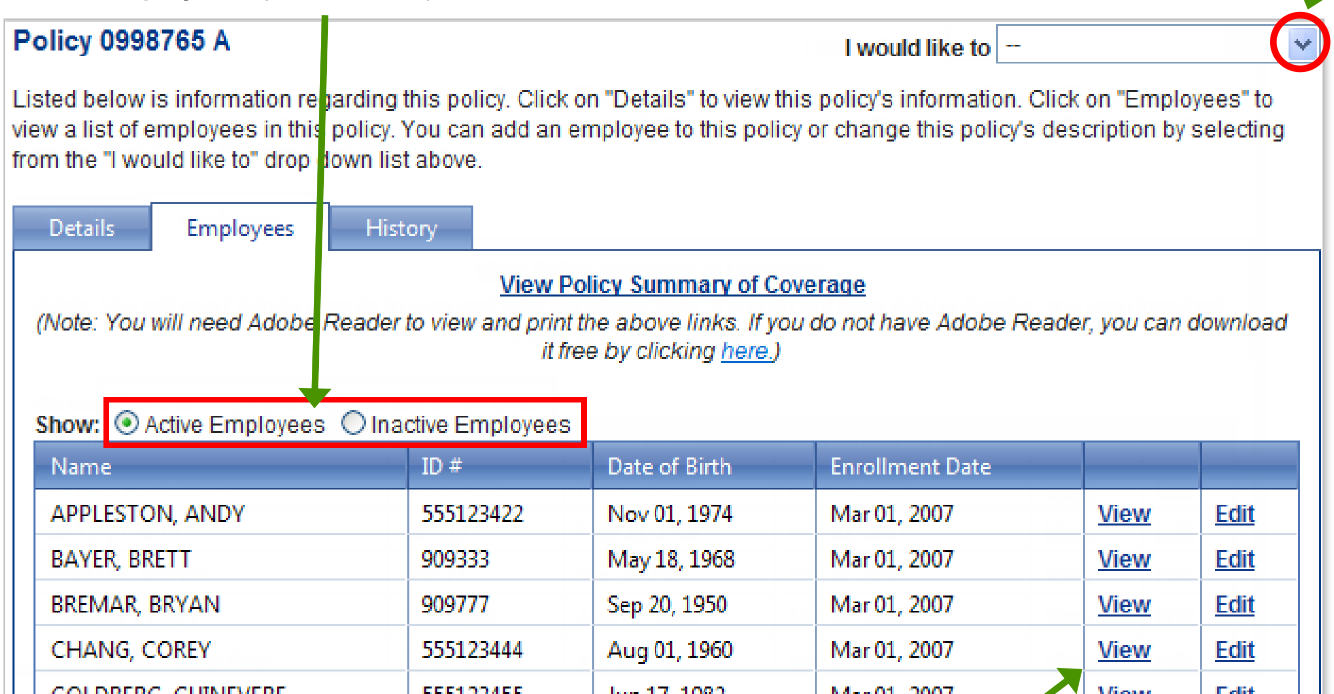
## Policy Information

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.



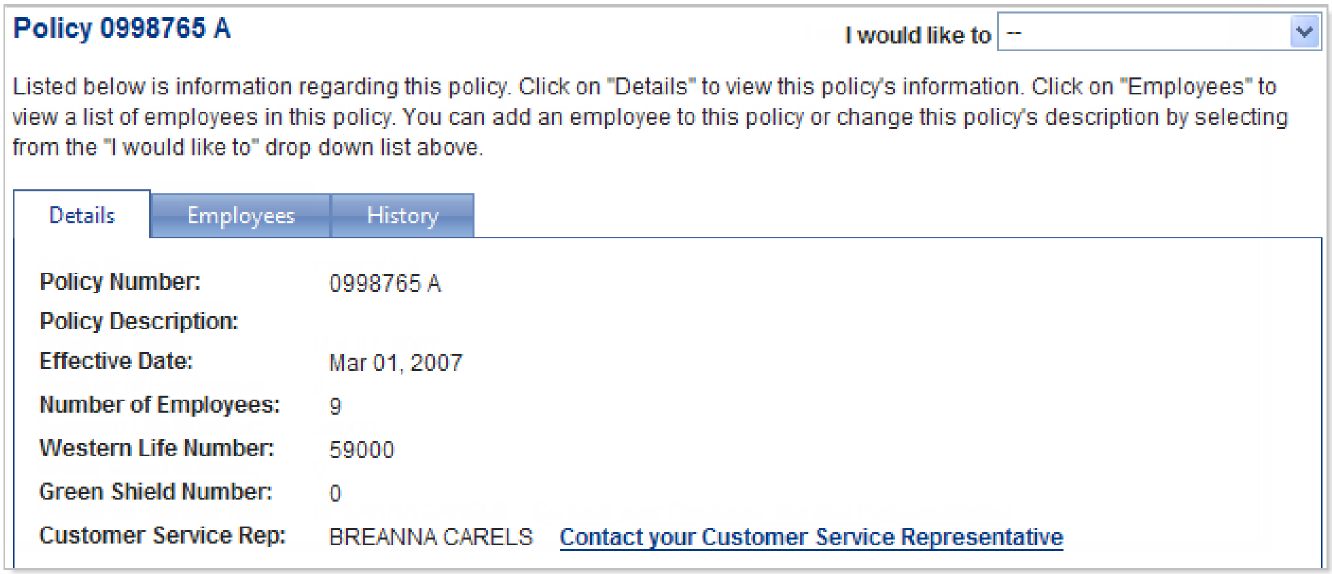

- You can add an employee to this policy or give the policy a personalized description by selecting the required option from the **I would like to** drop-down list at the top right.
- Click on the **Employees** tab to view a list of all employees under this account.

  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.




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.

- 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.




- 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.


| Transaction Type | Reason | Effective Date | Completed Date | Status | |
|---|---|---|---|---|---|
| • Manage Dependents (ROMY RODRIGUEZ) | | Oct 18, 2012 | Oct 18, 2012 | Completed | Details |
| -Dependent Personal Change (MARIA RODRIGUEZ) | | Oct 18, 2012 | Oct 18, 2012 | Completed | |
| • Request GreenShield Cards (COREY CHANG) | | Oct 12, 2012 | Oct 12, 2012 | Completed | Details |
| • Request GreenShield Cards (ROMY RODRIGUEZ) | | Oct 12, 2012 | Oct 12, 2012 | Completed | Details |
| • Request GreenShield Cards (WILLIAM WARMAN) | | Oct 12, 2012 | Oct 12, 2012 | Completed | Details |

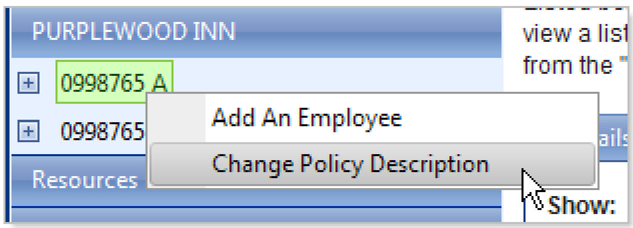
## Change Policy Description

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.

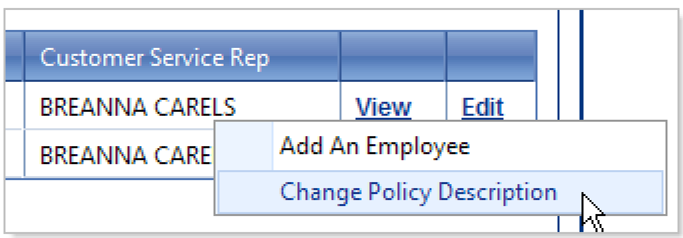
**Note:** You can change the policy description at any time but if you would like to completely delete the description and go back to having only the policy numbers appear in the navigation pane, you will need to contact your Insurance Advisor at 1-800-665-8990 for assistance

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

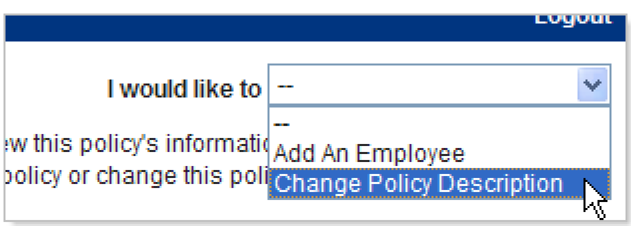
   - Right-click on the Policy number/description from the navigation pane and select **Change Policy Description** from the pop-up menu.



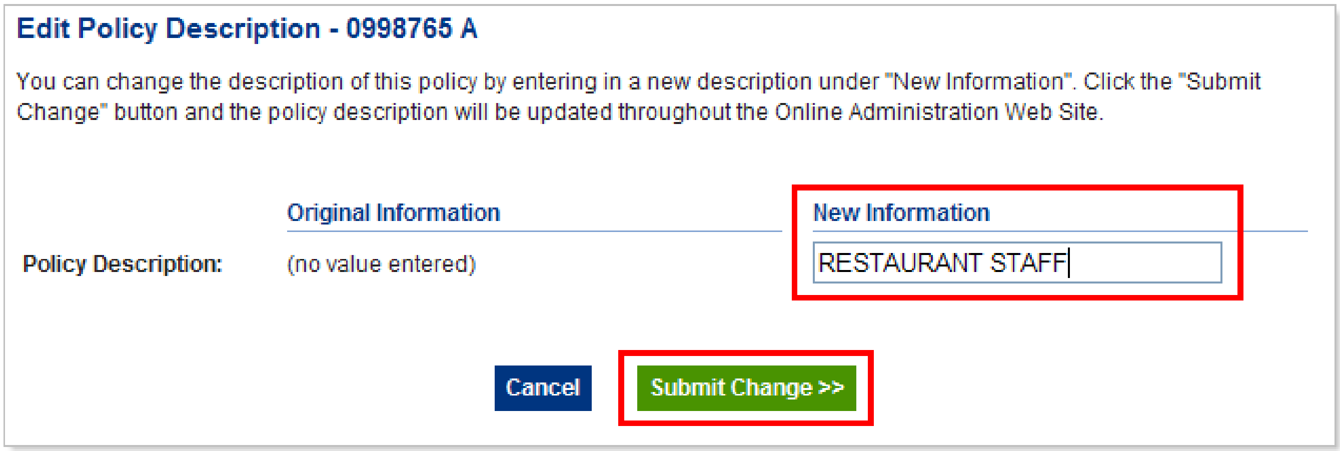

   - While viewing the **Policies** tab from the ***Account Information*** page, locate the policy from the list and click on **Edit** to the right. Select **Change Policy Description** from the pop-up menu.



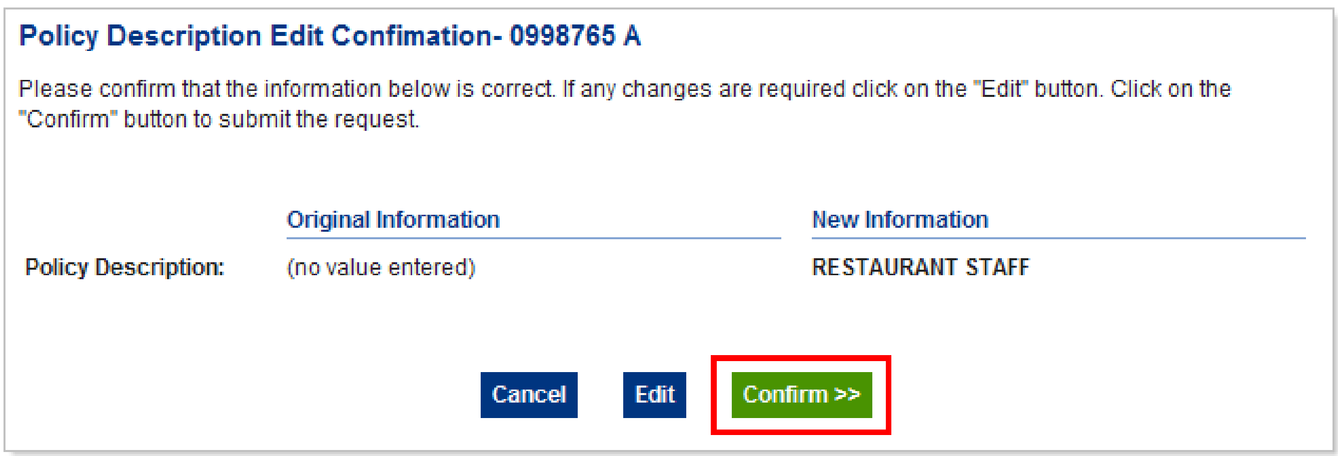

   - While viewing the ***Policy Information*** page, at the top right, click on the down arrow from the **I would like to** drop-down list and select **Change Policy Description**.



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



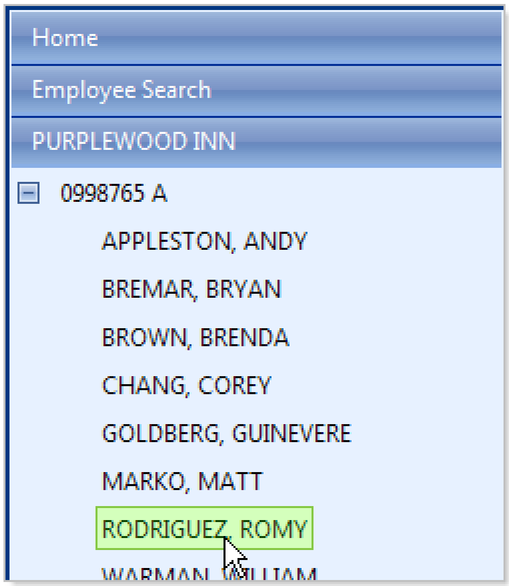

3. Review the New Information and click on **Confirm** to complete the change. You may also click on **Edit** to go back to the previous edit screen if you need to make any changes.



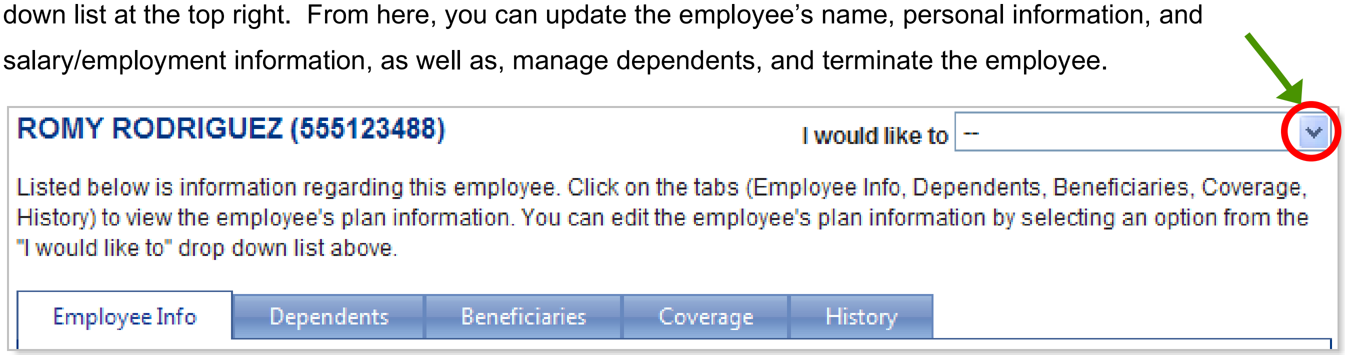

The new policy description will now appear in the navigation pane. It will also appear at the top of the ***Policy Information*** page along with the policy number in brackets.

## 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.



- 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

**Personal Info**

| | |
|---|---|
| **First Name:** | ROMY |
| **Last Name:** | RODRIGUEZ |
| **Middle Initial:** | RAIN |
| **Gender:** | Female |
| **Birth Date:** | Apr 19, 1976 |

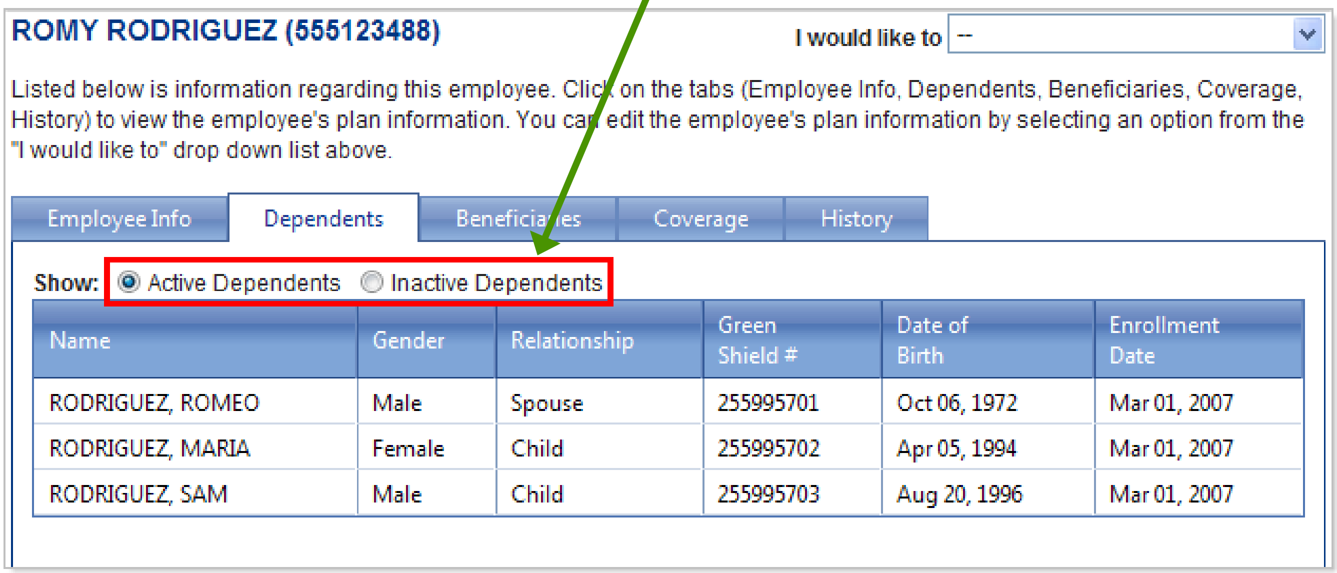
**Employment Info**

| | |
|---|---|
| **Prov of Residence:** | Alberta |
| **Occupation:** | MANAGER |
| **Date Hired:** | Jan 15, 2007 |
| **Income:** | $65,000.00 Annual |
| **Hours Worked per Week:** | 40 |
| **Months Worked per Year:** | 12 |

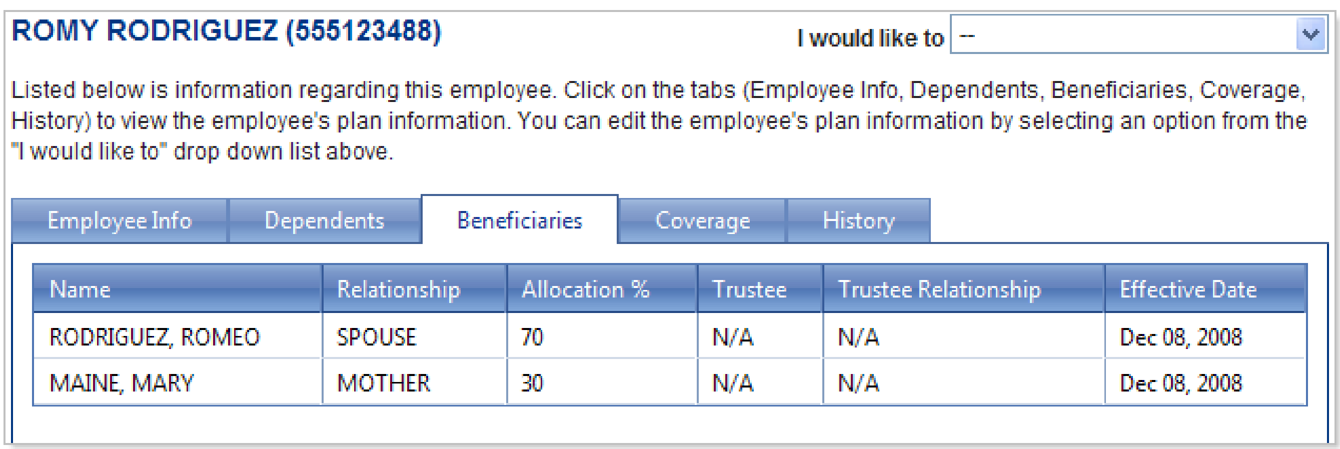
**Enrollment Info**

| | |
|---|---|
| **Family Status:** | Family |
| **Employee Status:** | Employee |
| **Employee Class:** | Salary Employees |
| **ID Number:** | 555123488 |
| **Enrollment Date:** | Apr 15, 2007 |
| **Coordination of Benefits:** | Spouse has Family Both |
| **Previously Underwritten:** | 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.

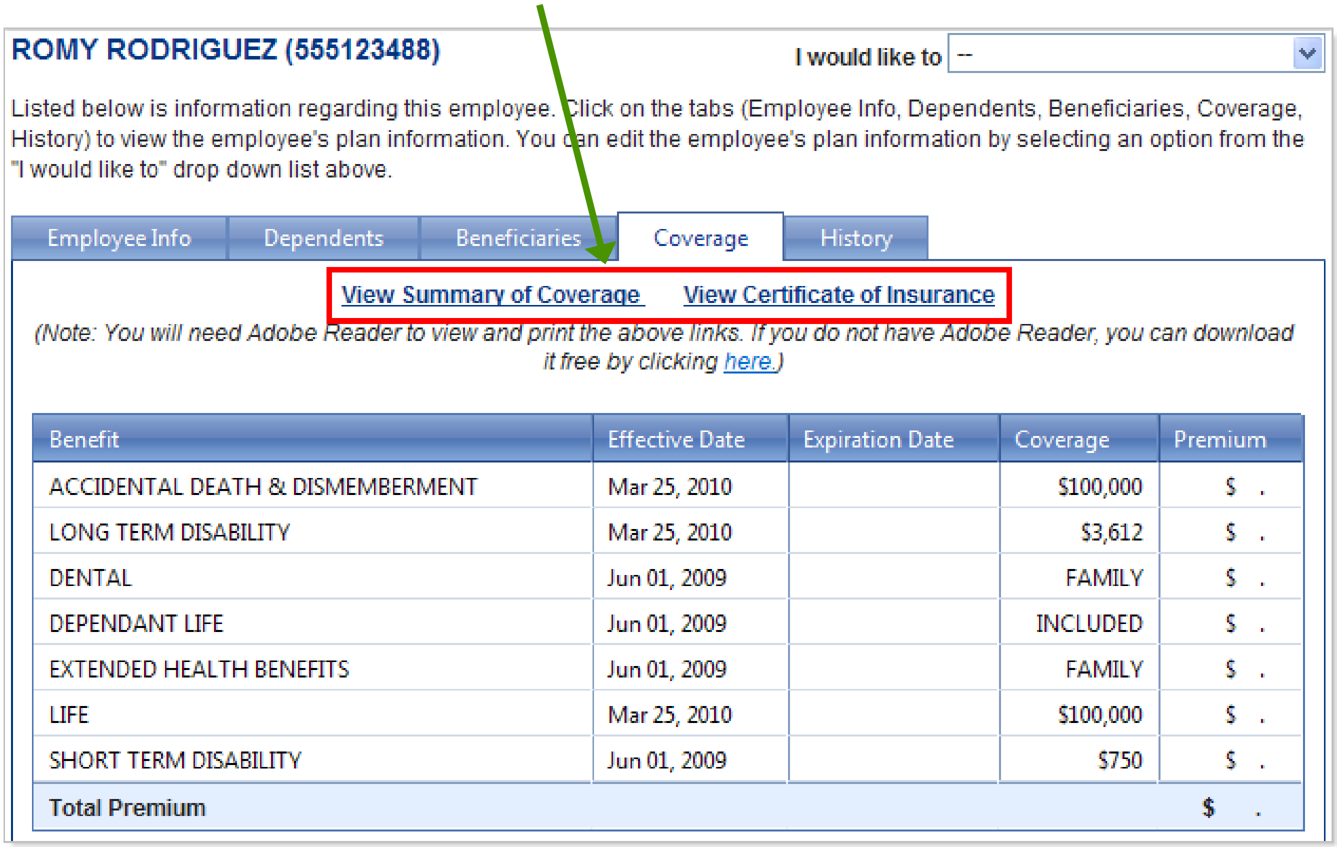



- Click on the **Beneficiaries** tab to view a list of all current beneficiaries for this employee.



- 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.

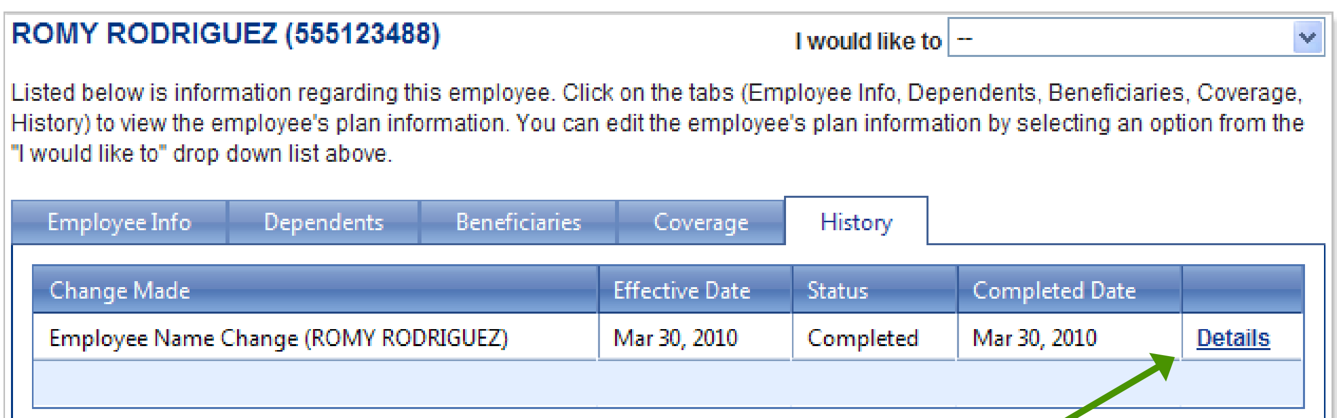
Employee Info | Dependents | Beneficiaries | Coverage | History

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 | $ . |
| **Total Premium** | | | | **$ .** |

- 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 | Details |

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

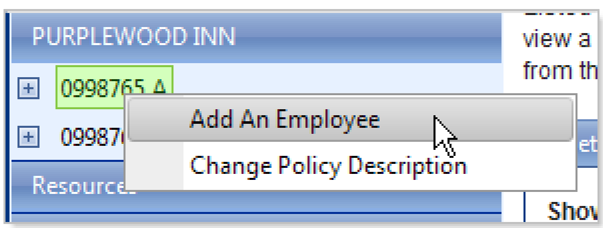
## Enrolling an Employee

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.

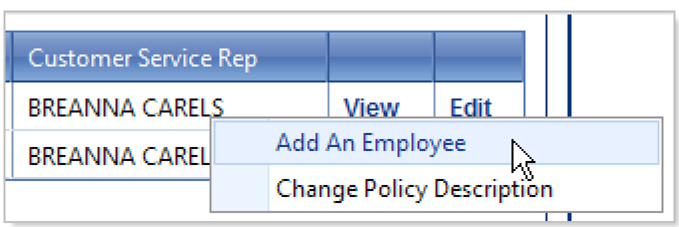
> For a definition of eligible employees and information regarding the effective date of insurance, please refer to the Enrolling New Members section of your Administration Guide:

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

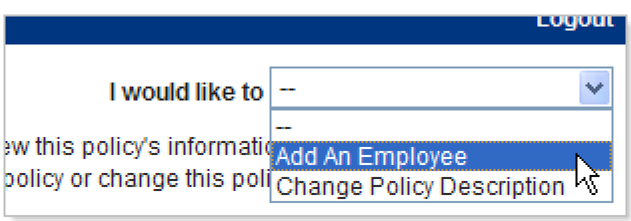
   - Right-click on the policy number/description from the navigation pane and select **Add An Employee**.




   - 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**.



2. 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:

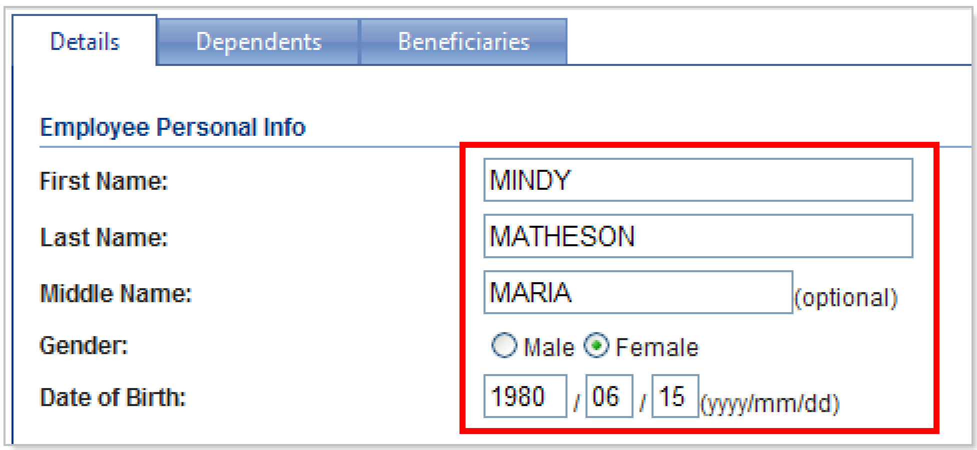
   a. Enter the **First Name**.

   b. Enter the **Last Name**.

   c. Enter a **Middle Name** or **Initial** (optional).

   d. Select the **Gender**.

   e. Enter the **Date of Birth** in YYYY/MM/DD format.




3. Below the personal information, complete the employment information:

   a. Enter the **Date Hired** in YYYY/MM/DD format. This will be the first day of full-time employment.

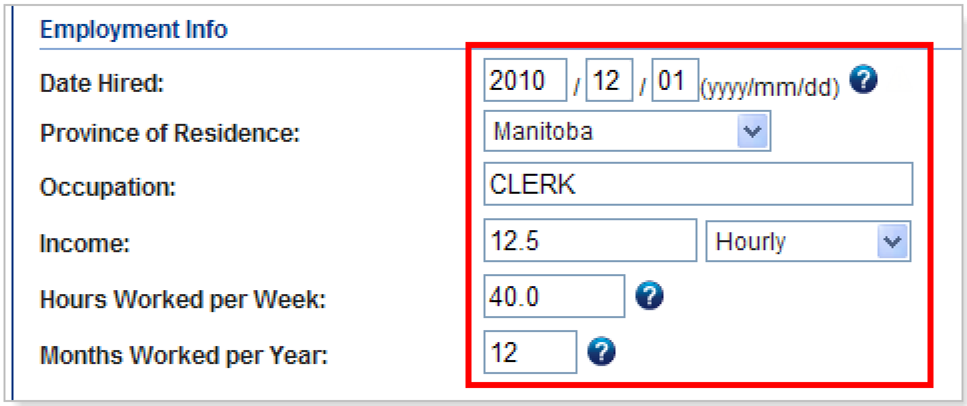
   b. Select the **Province of Residence** where the employee permanently resides (this may be different than their employment province).

   c. Enter an **Occupation**.

   d. Enter the **Income** amount and then select the income period from the drop-down list.

   e. 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.

   f. 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.



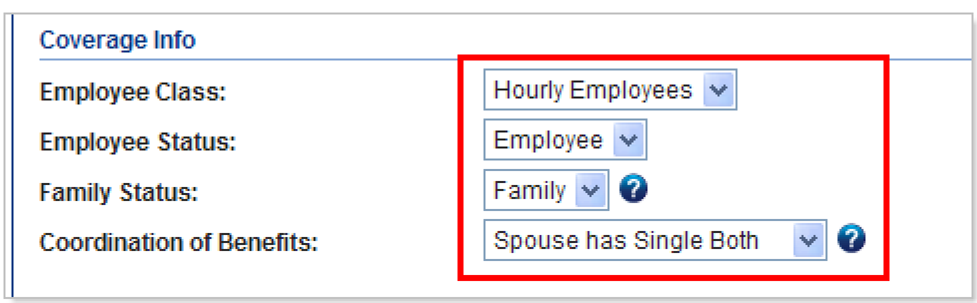

4. Next, complete the <u>coverage information</u>:

   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.
   <u>Note:</u> If the policy does <u>not</u> contain separate employee classes, this field will not be visible.

   b. Select the **Employee Status** from the drop-down list.

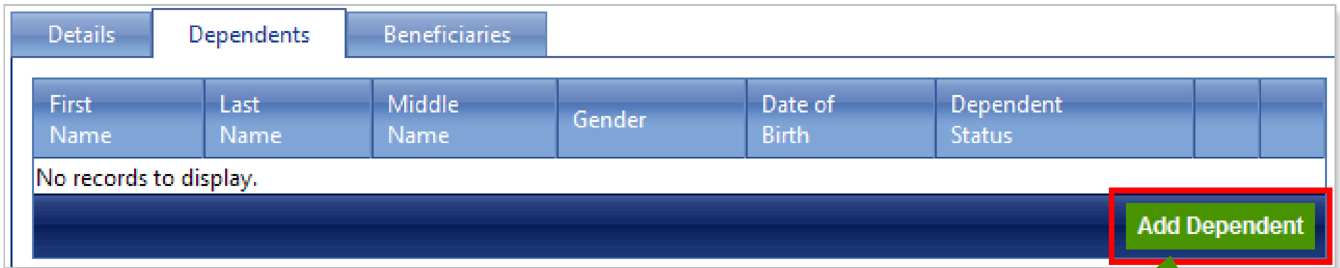
   c. Select the **Family Status** from the drop-down list. If Partial coverage is selected, employee will not be covered for Health/Dental coverage. Plan member must be covered with similar coverage on spouse's plan to select Partial coverage.

   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** of **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.




5. <u>Note:</u> <u>Don't</u> 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.

6. 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.




7. Click on **Add Dependent**.

8. The **Dependent** window will pop-up. Complete the dependent information:

    a. Enter the **First Name**.

    b. Enter the **Last Name**.

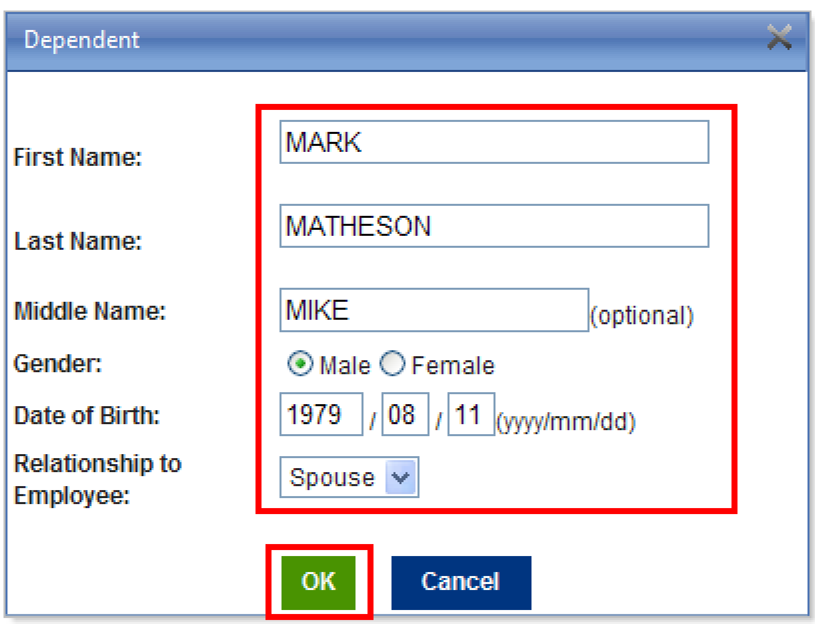
    c. Enter a **Middle Name** or Initial (optional).

    d. Select the **Gender**.

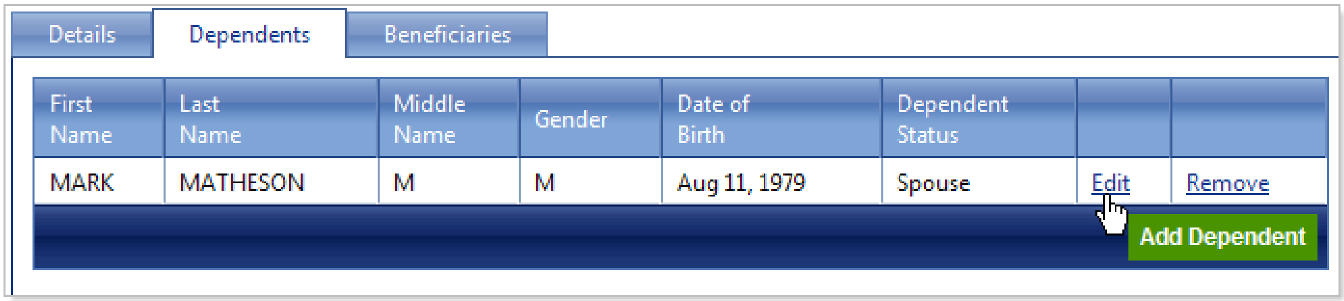
    e. Enter the **Date of Birth** in YYYY/MM/DD format.

    f. Select the **Relationship to Employee** from the drop-down list.

    g. Click on **OK**.

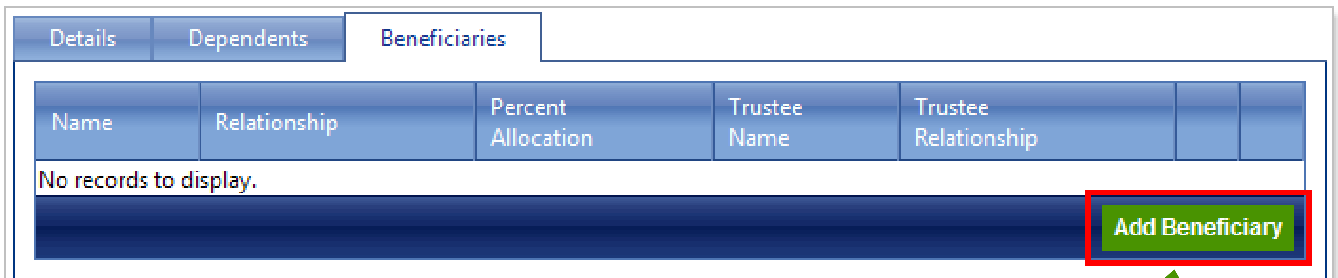


9. The dependent will now appear in the dependents list. If you need to make any changes you can click on **Edit** to go back to the **Dependent** information window. You can also click on **Remove** to delete the dependent.




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.




12. Click on **Add Beneficiary**.

13. The **Beneficiary** window will pop-up. Complete the beneficiary information:

    a. Enter the full name in **Last Name, First Name** format.

    b. Enter the **Relationship**. Enter relationship to employee.

    c. 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.

    d. If the beneficiary is less than 18 years old, a trustee must be appointed to act on the child's behalf.

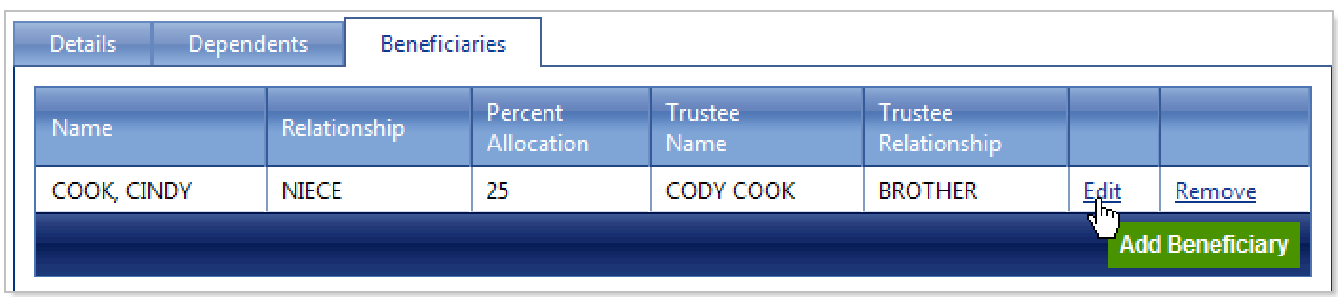
        i. Enter the **Trustee** name. A Trustee is only required if the beneficiary is less than 18 years of age.

        ii. Enter the **Trustee Relationship**. Enter the Trustee's relationship to the employee.

    e. Click on **OK**.

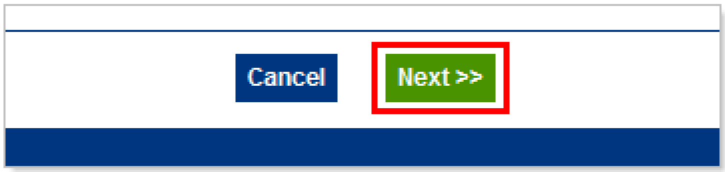
**Note:** If no beneficiary is wanted by the employee, enter ESTATE in the **Name** and **Relationship** fields and enter 100 as the **Percent Allocation**.


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.

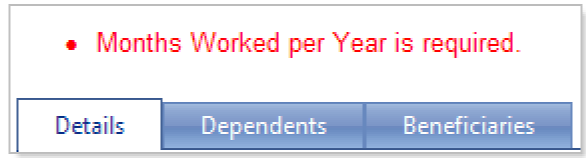


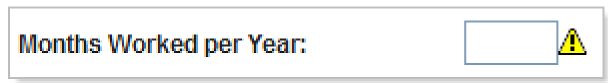

15. If there are more beneficiaries to add, repeat steps 12 – 14 until all beneficiaries have been added and the total of all the percent allocations is exactly equal to 100.

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

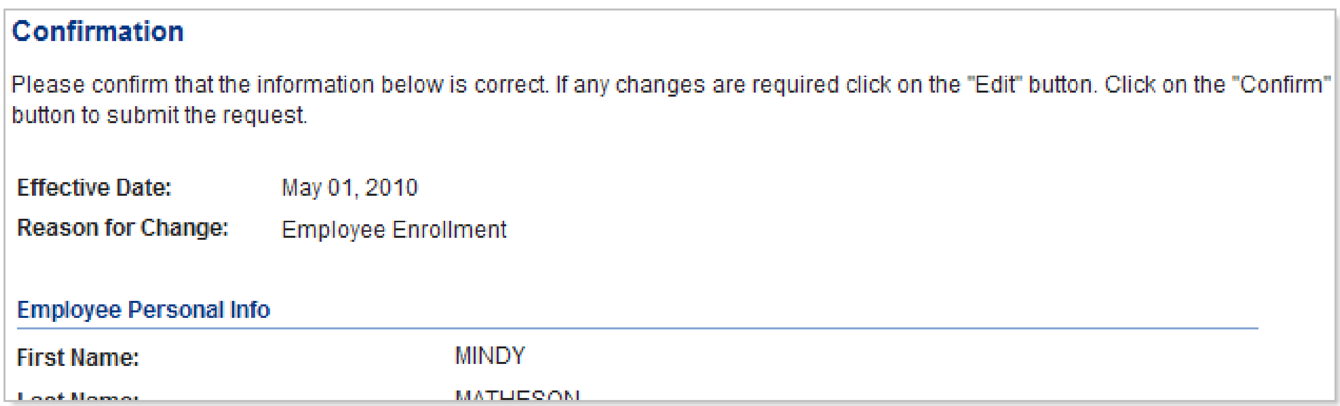



**Note:** If there are any required fields that have been left blank you will not be able to continue. The missed fields will be listed at the top of the page in red text and a ⚠ will appear beside the required fields.
You will be required to complete the information before you can click on **Next>>**.

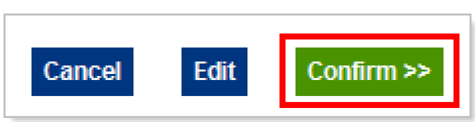



17. You will be taken to the **Confirmation** screen. Double check that all the information entered is correct.

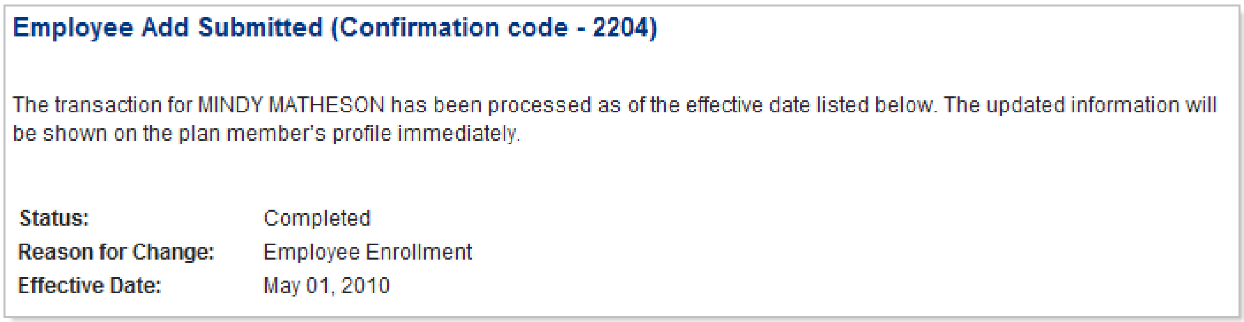



- If you need to make any changes, click on **Edit** to go back to the previous screen.
- If the information is correct, click on **Confirm>>** at the bottom of the page.

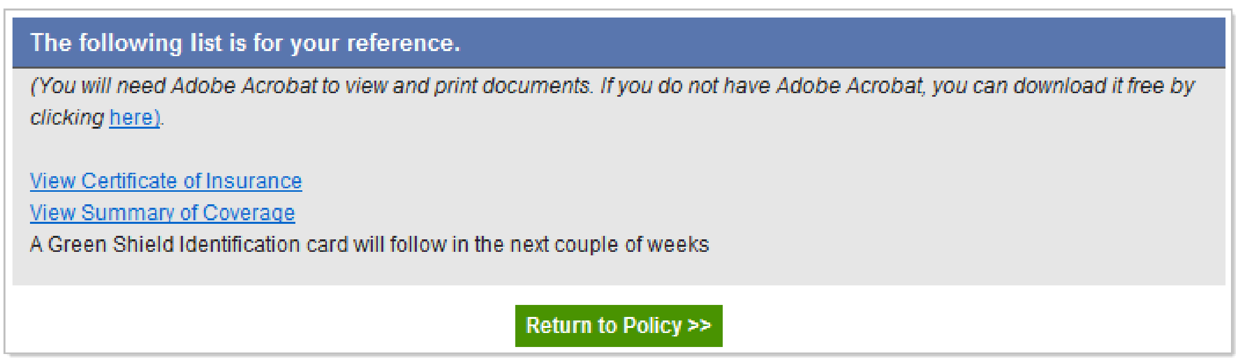


18. Once you click **Confirm>>**, the **Employee Add Submitted** screen will appear.

- 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.

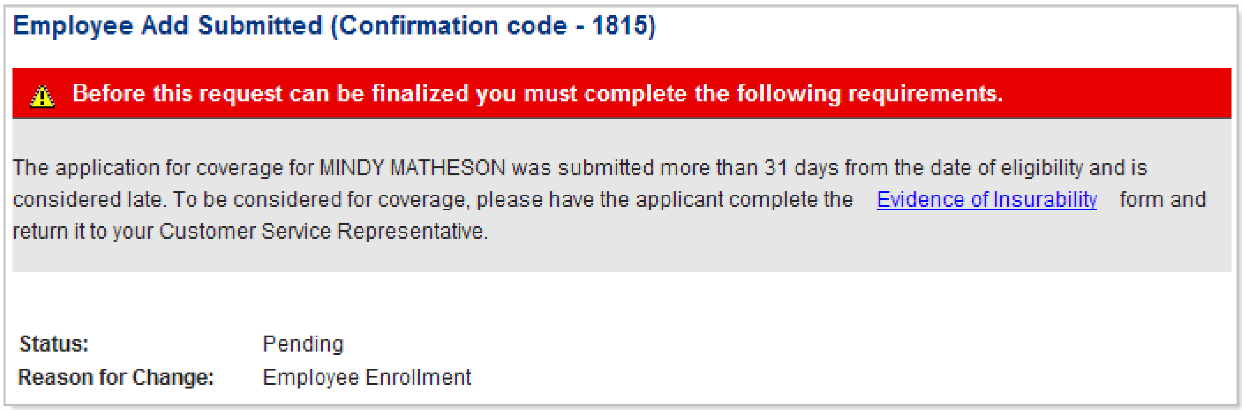



Documents will be listed for your reference at the bottom of the page.

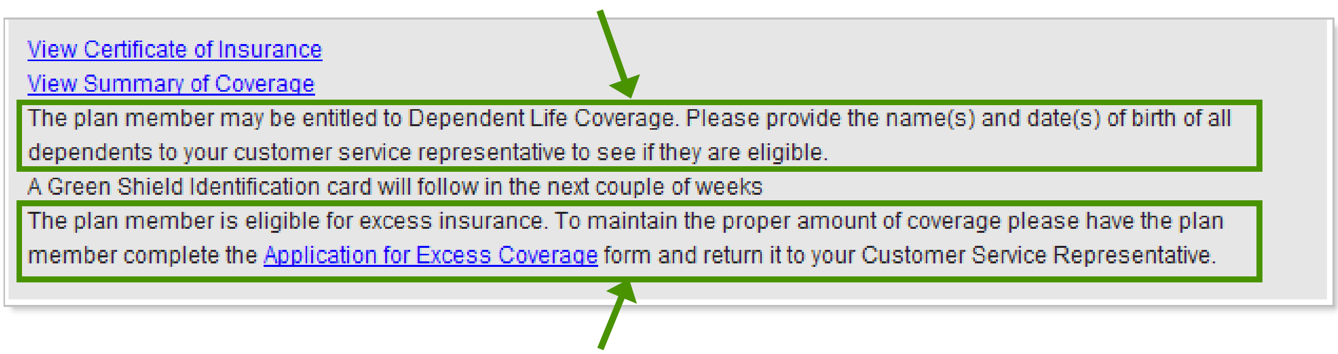



  - Click on the **Certificate of Insurance** link to view a Certificate of Insurance for the new employee.
  - Click on the **Summary of Coverage** link to view a Summary of Coverage report for the new employee.

- 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.




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 **<u>Employee Add Submitted</u>** 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.




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 **<u>Employee Add Submitted</u>** 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 <u>Applying for Excess Insurance</u> section of your <u>Administration Guide</u>:

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

View Certificate of Insurance   View 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.)*

| 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 | $ . |
| **Total Premium** | | | | **$ .** |

**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

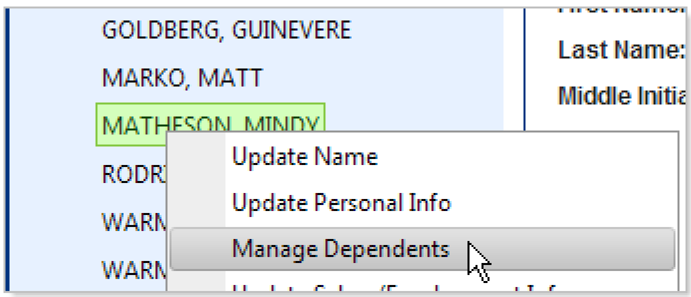
| Change Made | Effective Date | Status | Completed Date | |
|---|---|---|---|---|
| Employee Add (MINDY MATHESON) | May 01, 2010 | Completed | May 13, 2010 | Details |

## Enrolling a Dependent

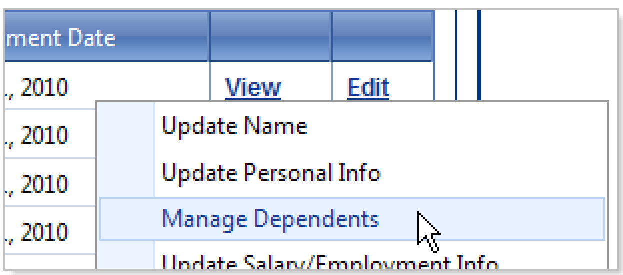
New dependents for existing employees who are eligible for employee benefits may be enrolled directly online.  If an existing employee does not have any pre-existing active dependents, their **Family Status** will automatically change to ***Family*** on the effective date of the new dependent.

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

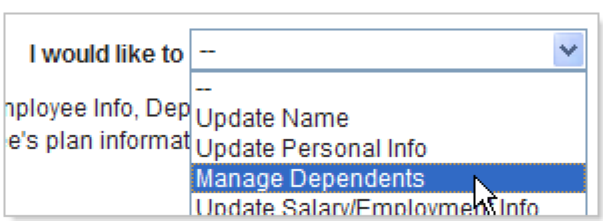
    - Right-click on the employee name from the navigation pane and select **Manage Dependents**.




    - 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**.



2. 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 | •Edit •Terminate |

Add Dependent

3. The **Add Dependent** screen will appear, complete the dependent information:

   a. Enter the **First Name**.

   b. Enter the **Last Name**.

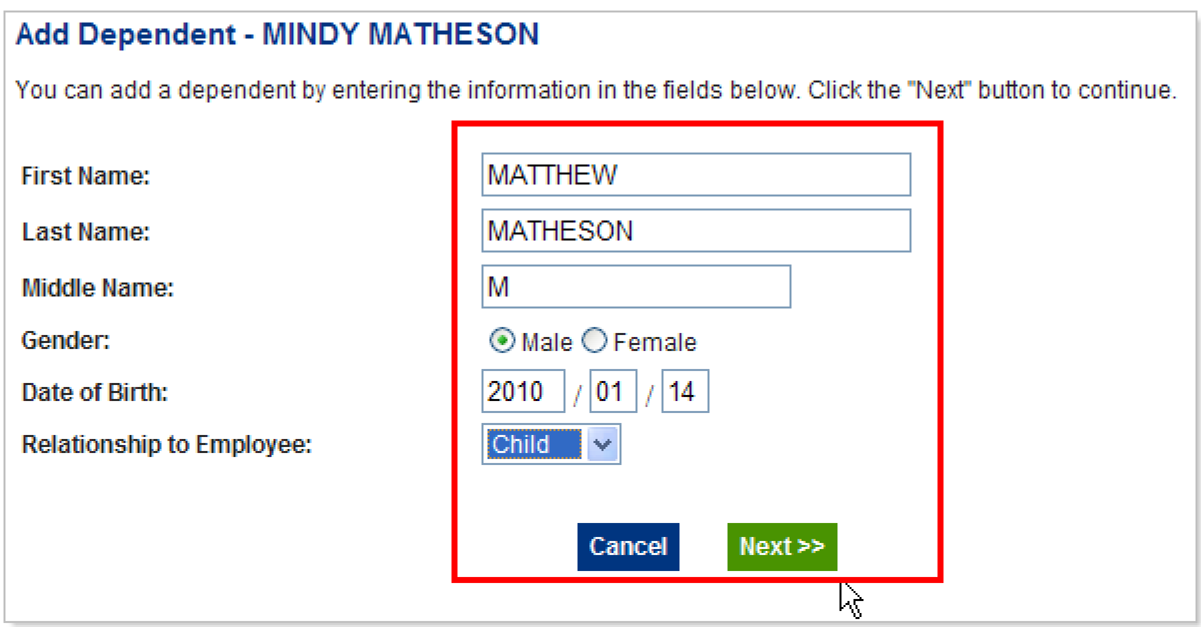
   c. Enter a **Middle Name** or Initial as required.

   d. Select the **Gender**.

   e. Enter the **Date of Birth** in YYYY/MM/DD format.

   f. Select the **Relationship to Employee** from the drop-down list.

   g. 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: MATTHEW

Last Name: MATHESON

Middle Name: M

Gender: Male Female

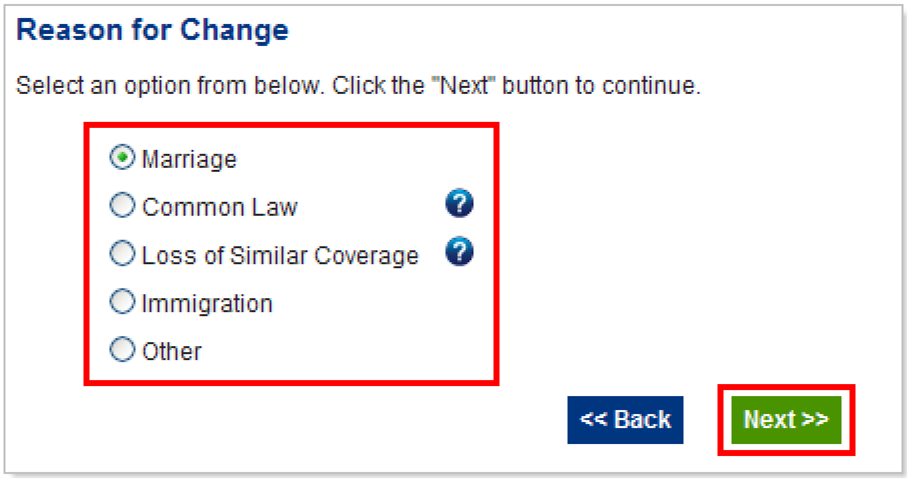
Date of Birth: 2010 / 01 / 14

Relationship to Employee: Child

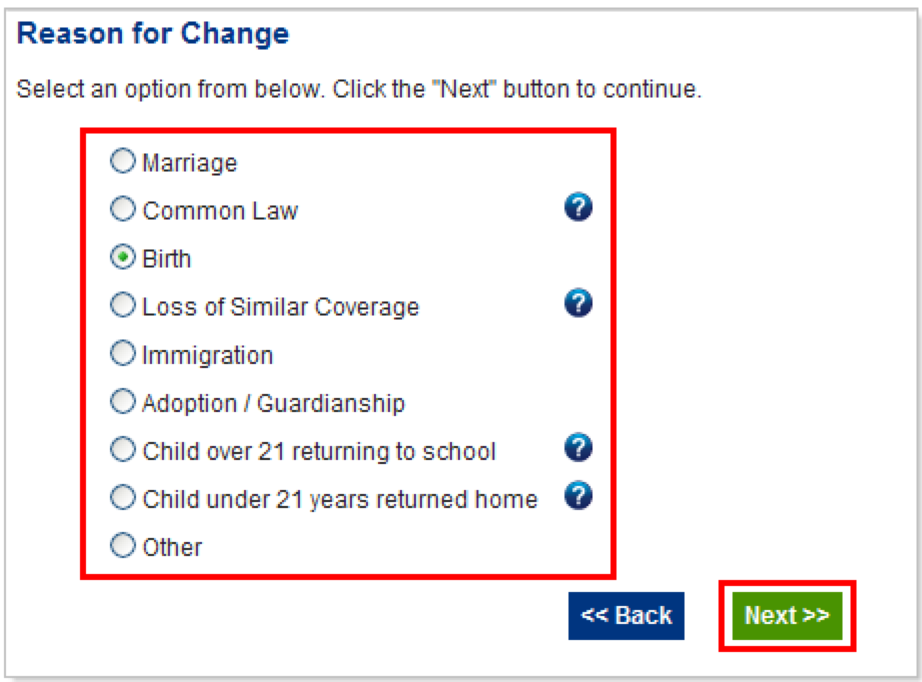
Cancel Next >>

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

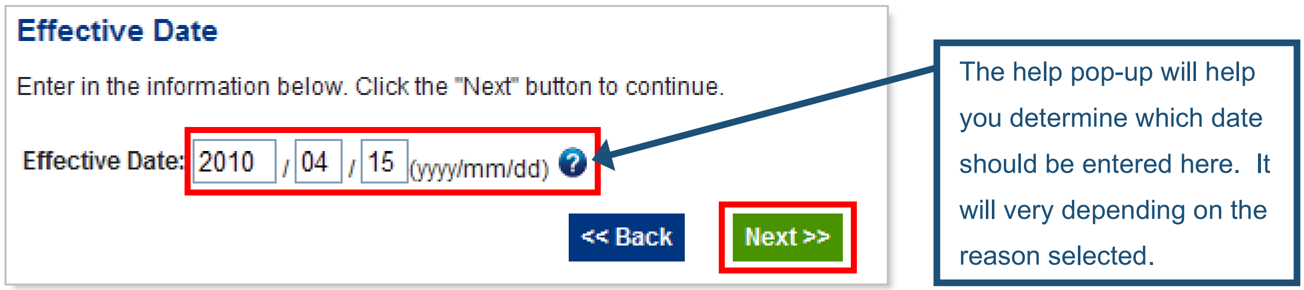
- If you selected **Spouse** in the step above, you will see the following options:



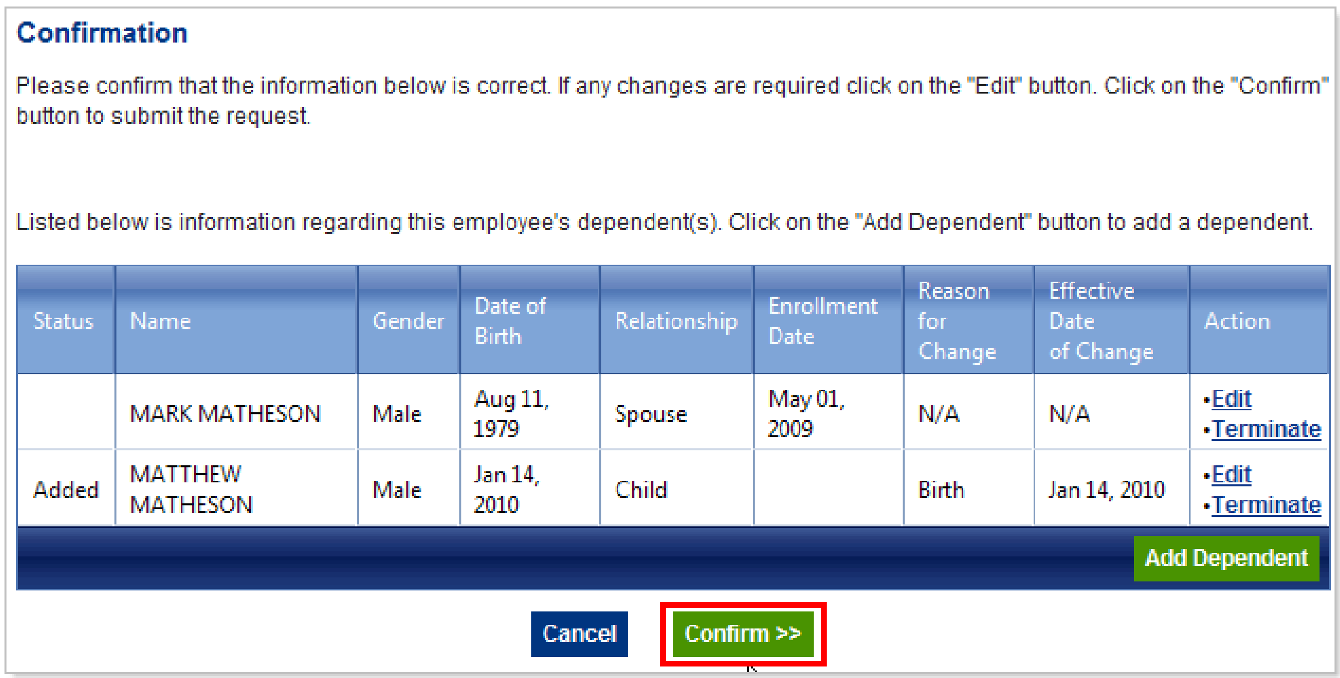

- If you selected **Child** in the step above, you will see the following options:



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




6. 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 | •Edit •Terminate |
| Added | MATTHEW MATHESON | Male | Jan 14, 2010 | Child | | Birth | Jan 14, 2010 | •Edit •Terminate |

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.**

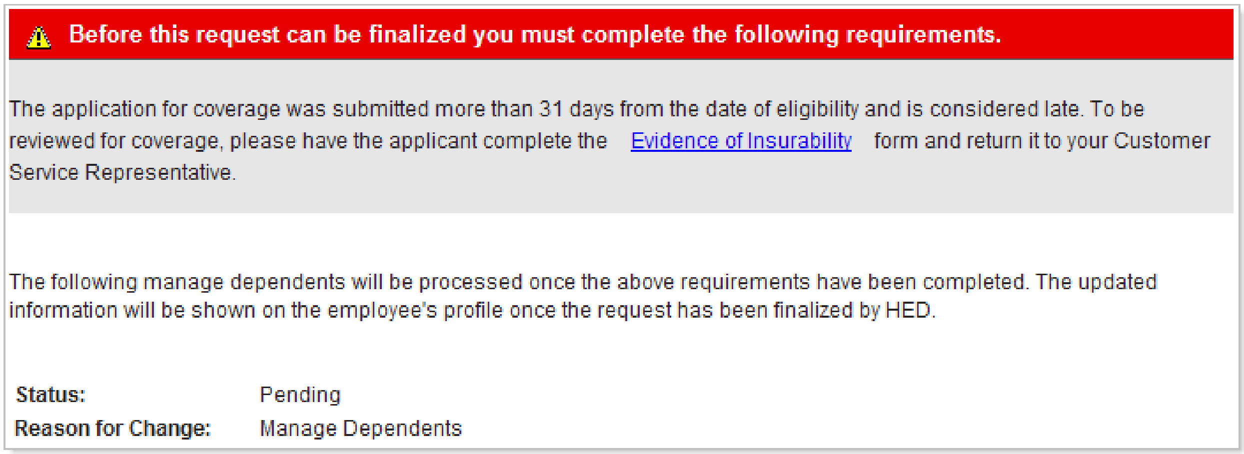
     *(You will need Adobe Acrobat to view and print documents. If you do not have Adobe Acrobat, you can download it free by clicking here).*

     View Certificate of Insurance
     View Summary of Coverage
     A Green Shield Identification card will follow in the next couple of weeks

     Return to Policy >>

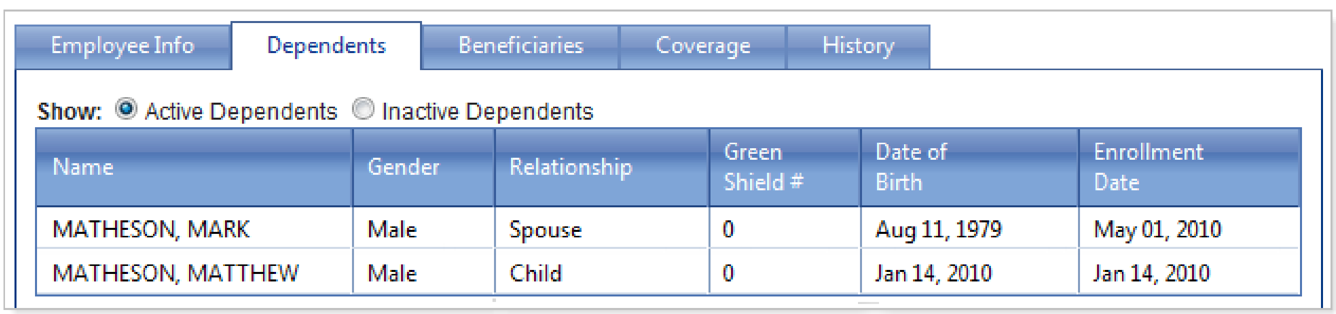
     - Click on the **Certificate of Insurance** link to view an updated Certificate of Insurance for the employee.
     - Click on the **Summary of Coverage** link to view an updated Summary of Coverage report for the employee.

- 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.




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.

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




| 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

View Summary of Coverage  View Certificate of Insurance

| 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 | $ . |
| **Total Premium** | | | | **$ .** |

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 | Details |

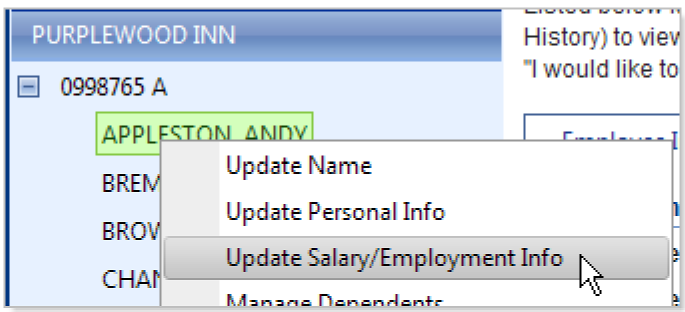
# Updating Employee Information

## Salary & Employment Information Changes

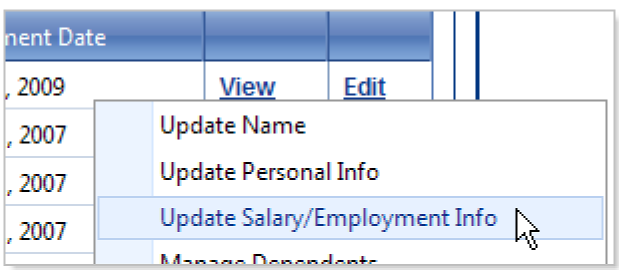
Employment information that can be updated using the Online Administration Web Site include the employee status (e.g. employee, manager, owner, etc.), occupation, income, hours worked per week, and months worked per year.

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

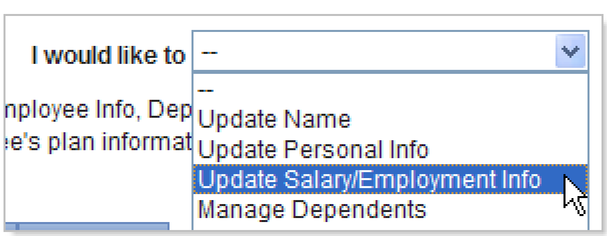
   - Right-click on the employee's name from the navigation pane and select **Update Salary/Employment Info**.




   - 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**.

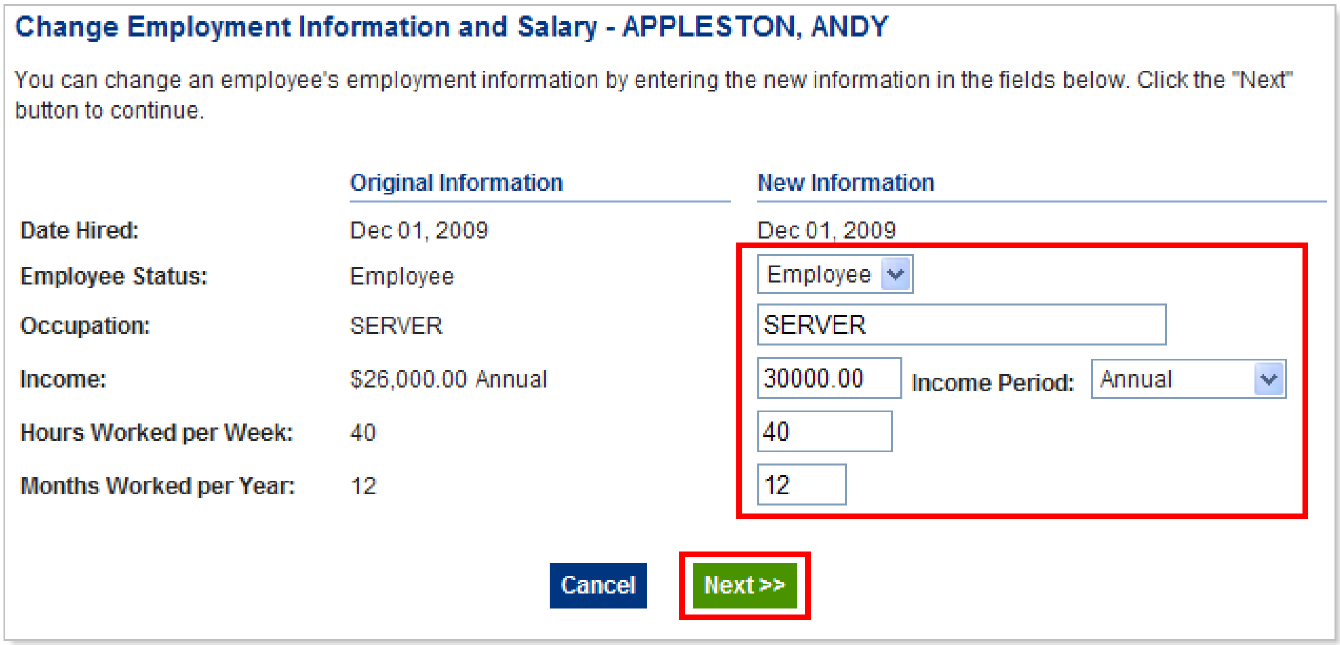



   - At the top right of the ***Employee Information*** page, click on the down arrow from the **I would like to** drop-down list and select **Update Salary/Employment Info**.

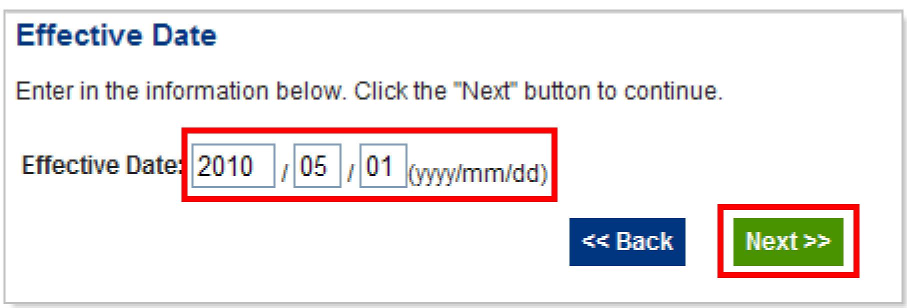


2. You will be taken to the **<u>Change Employment Information and Salary</u>** screen. The current employment information will be showing under <u>Original Information</u>.

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




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



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

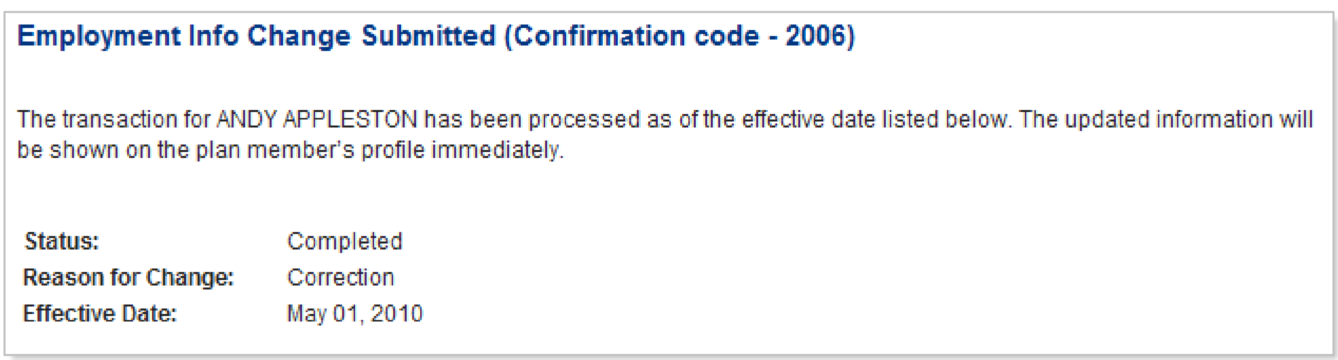
**Reason for Change:** Correction

| | Original Information | New Information |
|---|---|---|
| **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 |

Cancel Edit Confirm >>

- 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)

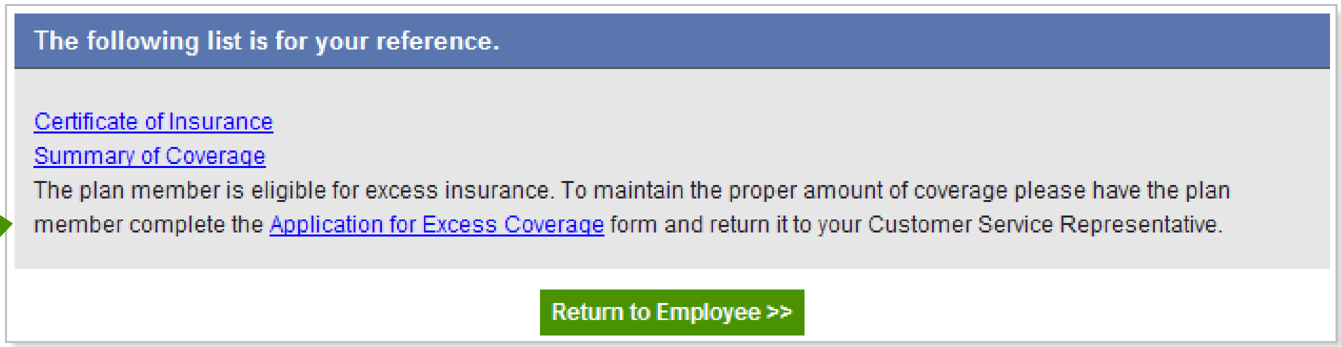
The transaction for ANDY APPLESTON has been processed as of the effective date listed below. The updated information will be shown on the plan member's profile immediately.

**Status:** Completed

**Reason for Change:** Correction

**Effective Date:** May 01, 2010

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

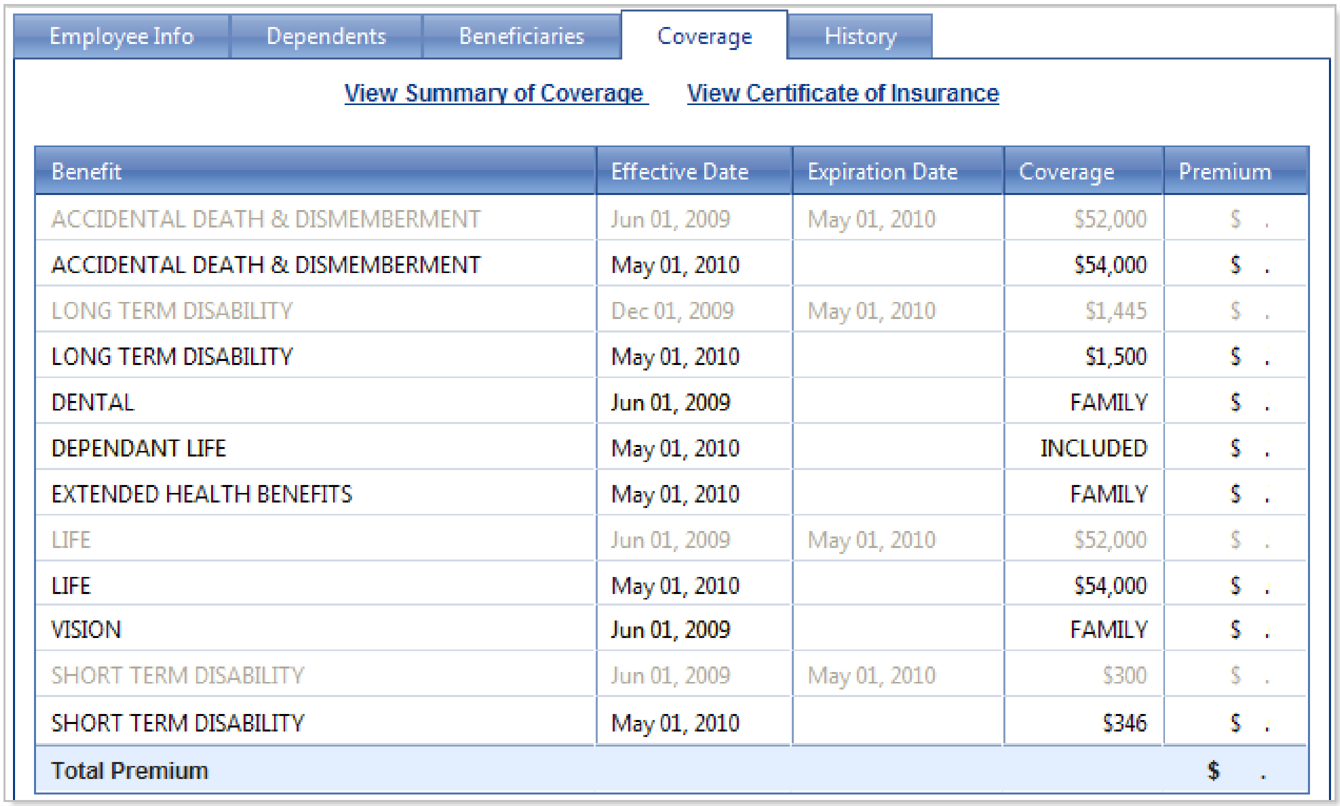



- Click on the **Certificate of Insurance** link to view an updated Certificate of Insurance for the employee.
- Click on the **Summary of Coverage** link to view an updated Summary of Coverage report for the employee.

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:

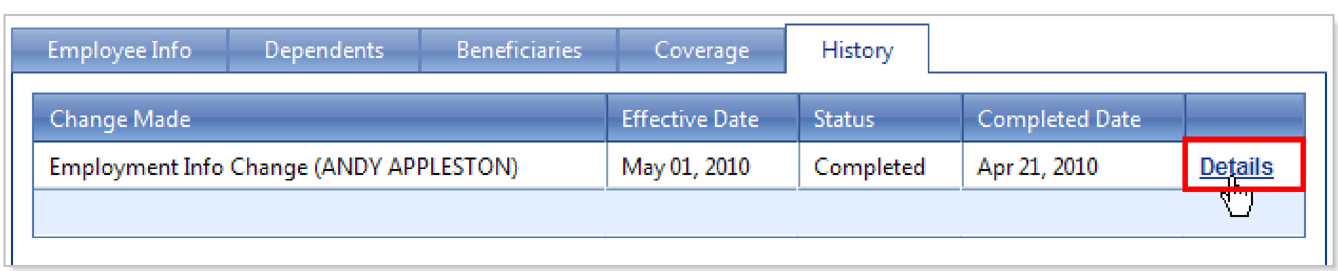
7. Once the salary and employment information has been changed, any coverage changes will appear on the employee's **Coverage** tab. If the employment information changes were effective on a past date, just the updated coverages will be listed on this tab. If the employment information changes are effective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




| 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 | $ . |
| **Total Premium** | | | | **$ .** |

**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.



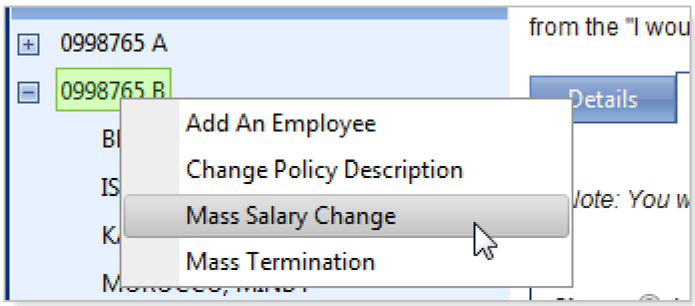

| Change Made | Effective Date | Status | Completed Date | |
|---|---|---|---|---|
| Employment Info Change (ANDY APPLESTON) | May 01, 2010 | Completed | Apr 21, 2010 | Details |

## Mass Salary Changes

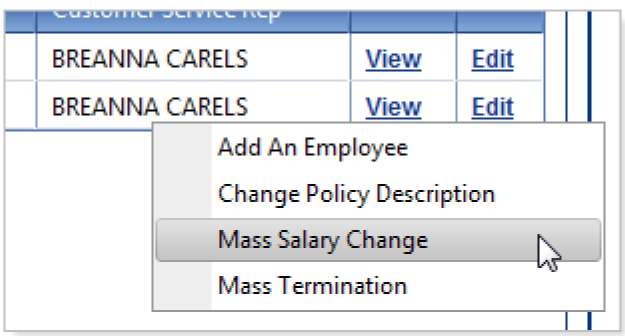
If you have several employees with salary updates, you can update them at the same time through the Mass Salary Change feature.

1. To perform a mass employee salary change, there are 3 different ways to begin:

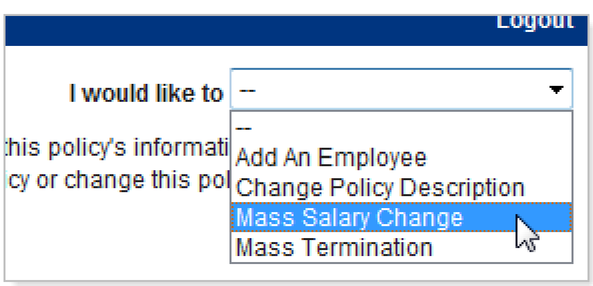
   a. Right-click on the Policy number/description from the navigation pane and select **Mass Salary Change** from the pop-up menu.




   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.

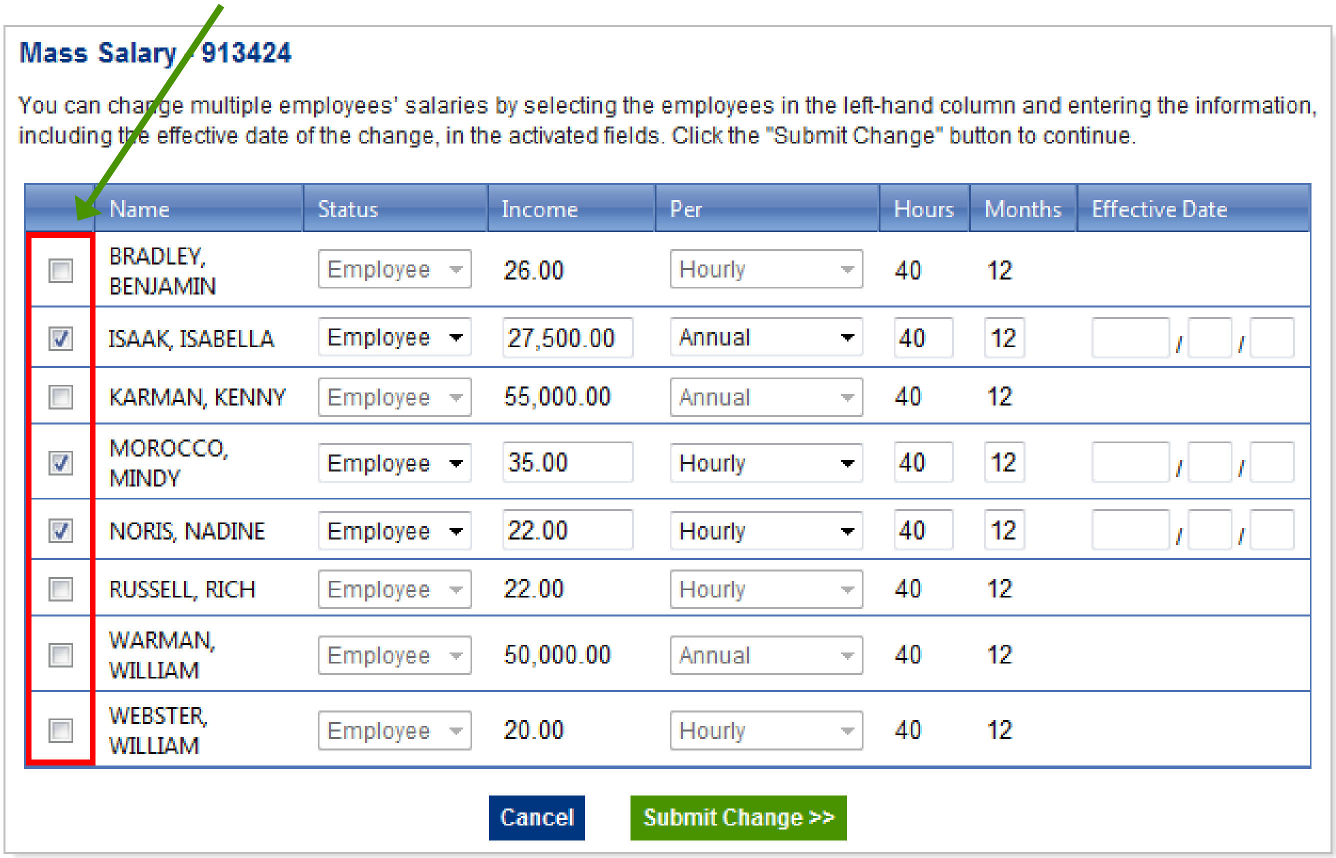



   c. While viewing the ***Policy Information*** page, at the top right, click on the down arrow from the **I would like to** drop-down list and select **Mass Salary Change**.



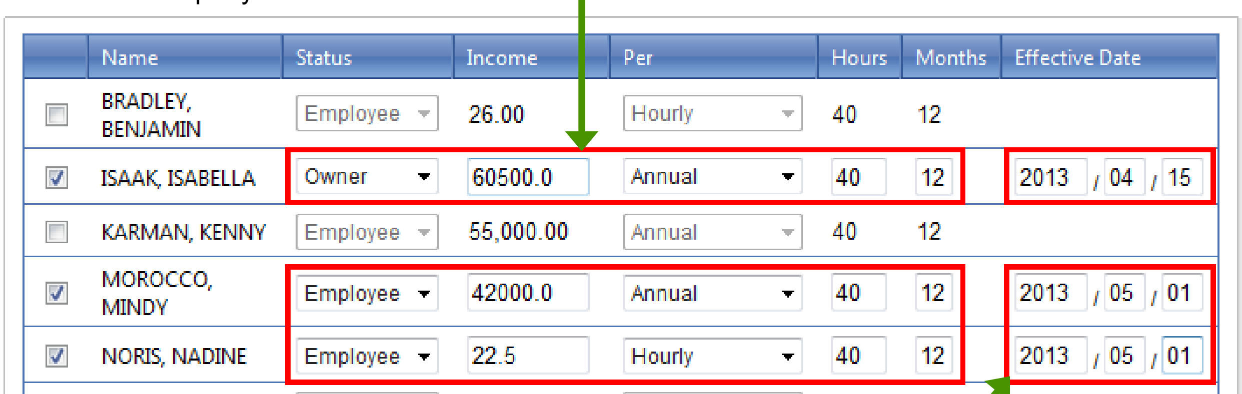
2. You will be taken to the **<u>Mass Salary</u>** screen. The active employees will be listed along with their current employment information.

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



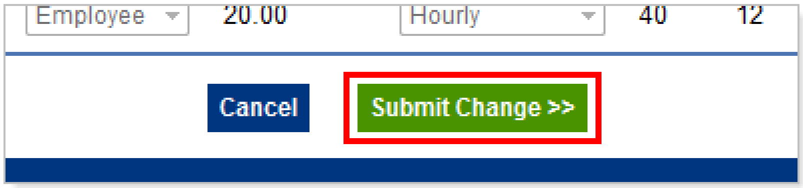

3. For each employee with a checkmark, update their salary information as required.

   a. You can update their employee **Status**, **Income**, income **Per** range, **Hours** worked per week, and **Months** worked per year.

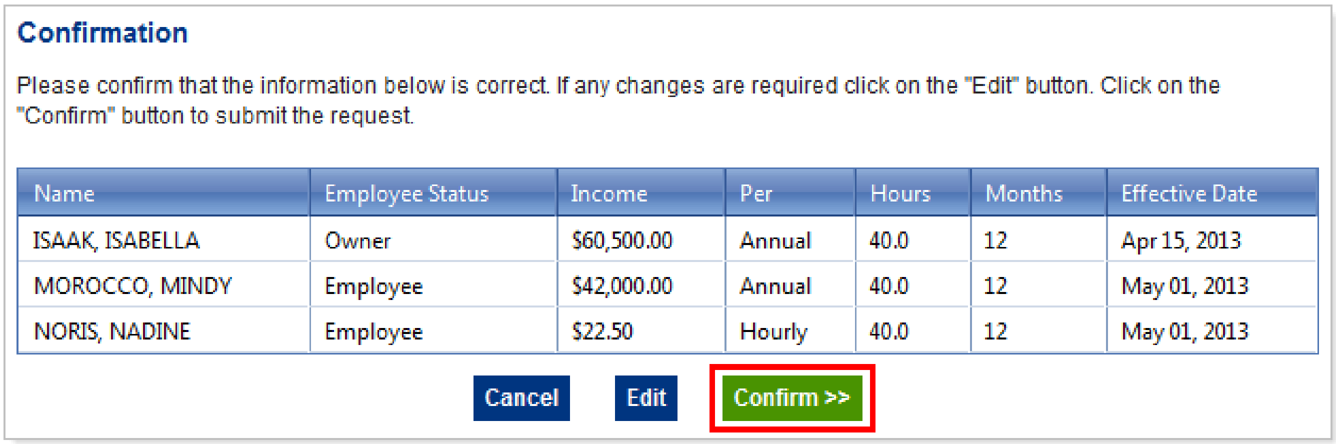



   b. Enter the **Effective Date** for the salary change.

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




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.

6. Once you click **Confirm>>**, the **<u>Mass Salary Change Submitted</u>** 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 | View |
| MINDY MOROCCO | Employee | $42,000.00 | Annual | 40 | 12 | May 01, 2013 | Completed | View |
| NADINE NORIS | Employee | $22.50 | Hourly | 40 | 12 | May 01, 2013 | Completed | View |

**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.

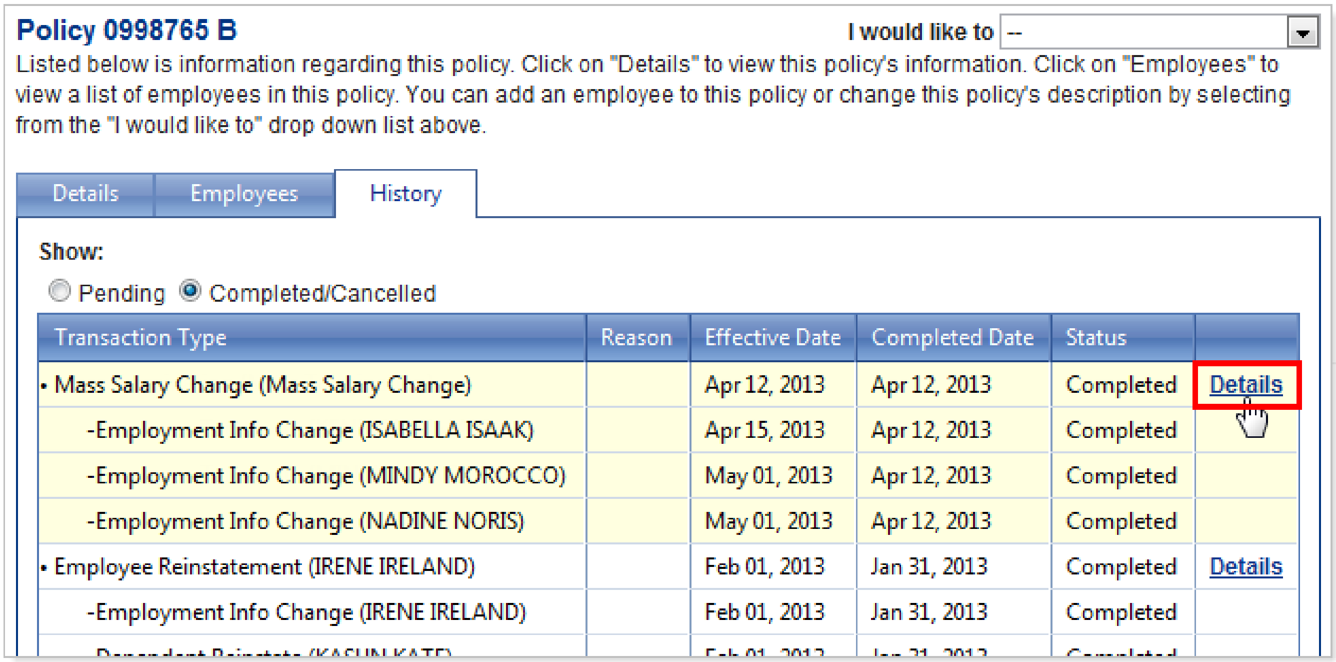
- To the right of an employee, click on the **View** link to view an updated <u>Certificate of Insurance</u> for the employee.
- Near the bottom, click on the **View Summary of Coverage** link to view an updated <u>Summary of Coverage</u> report for the entire policy.

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.

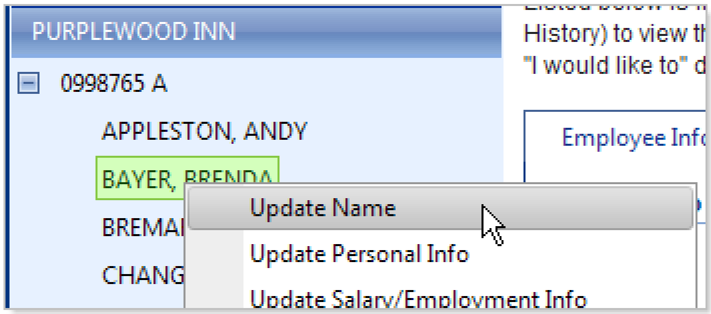
9. On the *policy's* **History** tab, the mass salary change will be listed. You can click on **Details** to again view the **Mass Salary Change Submitted** screen.



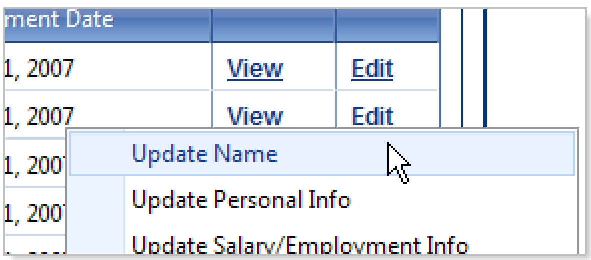
## Name Changes

1. To change an employee's name, there are 3 different ways to begin:

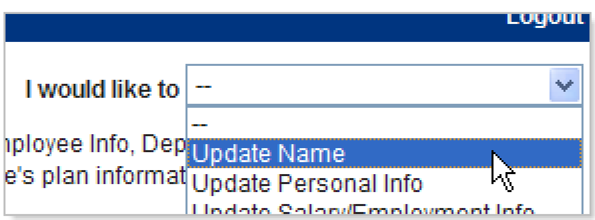
    - Right-click on the employee's name from the navigation pane and select **Update Name**.




    - 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**.

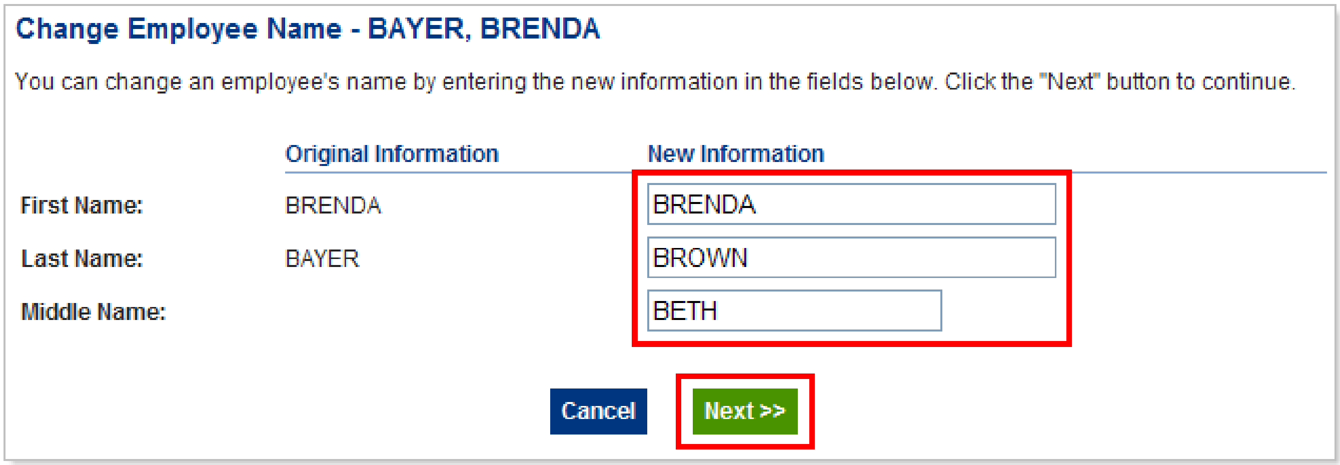



    - At the top right of the ***Employee Information*** page, click on the down arrow from the **I would like to** drop-down list and select **Update Name**.



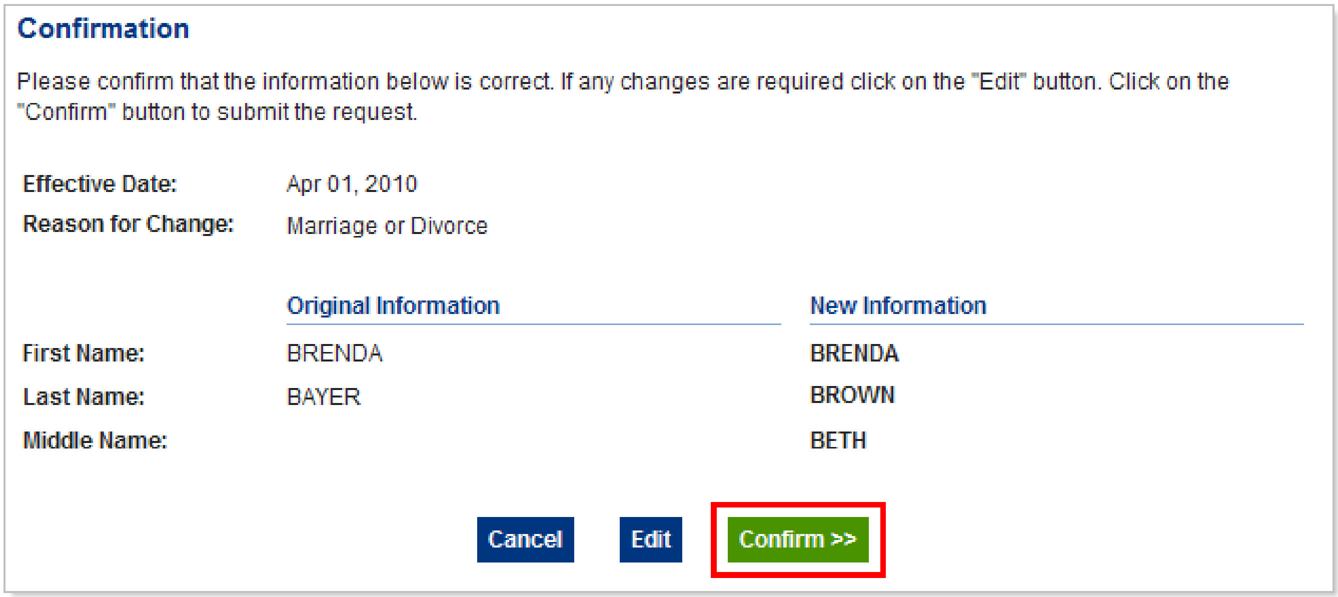
2. You will be taken to the **Change Employee Name** screen. The current **First**, **Last**, and **Middle Names** will be showing under Original Information.

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




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

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.

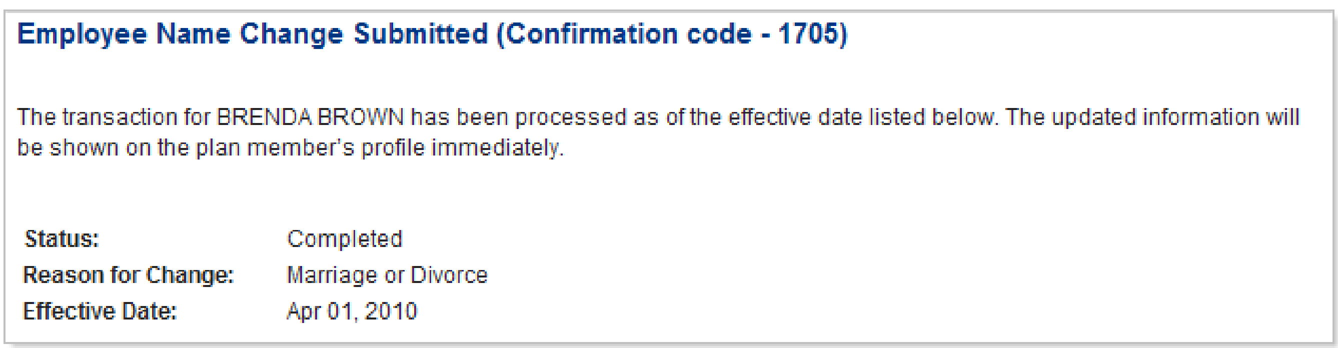
| | |
|---|---|
| **Effective Date:** | Apr 01, 2010 |
| **Reason for Change:** | Marriage or Divorce |

| | Original Information | New Information |
|---|---|---|
| **First Name:** | BRENDA | BRENDA |
| **Last Name:** | BAYER | BROWN |
| **Middle Name:** | | BETH |

Cancel Edit Confirm >>

- 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)

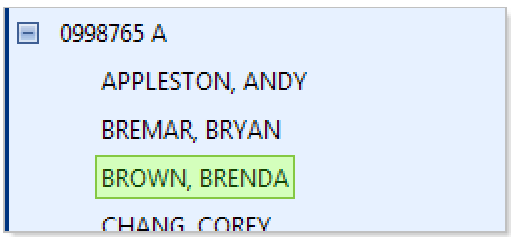
The transaction for BRENDA BROWN has been processed as of the effective date listed below. The updated information will be shown on the plan member's profile immediately.

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

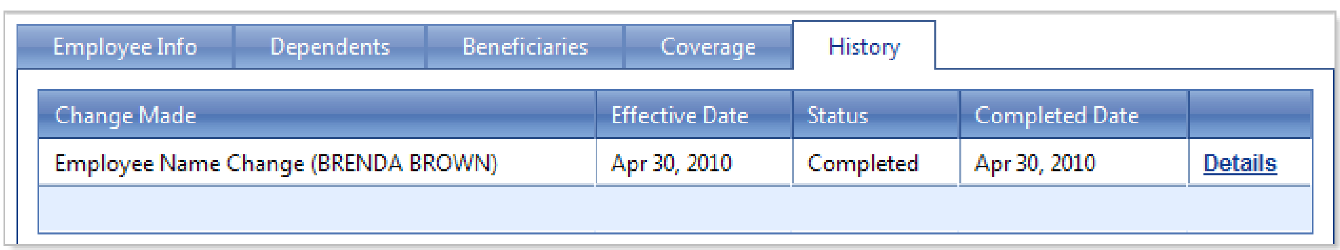
At the bottom of the page, documents are listed for your reference.


- 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.




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.

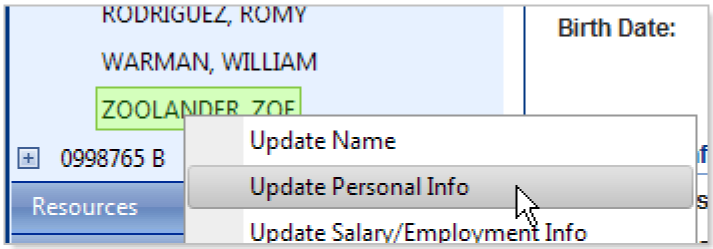


## Personal Information Changes

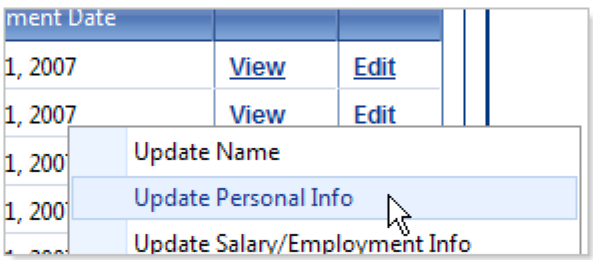
Personal information for an employee refers to their *date of birth* and *gender*. This information can be updated in case it has been entered incorrectly.

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

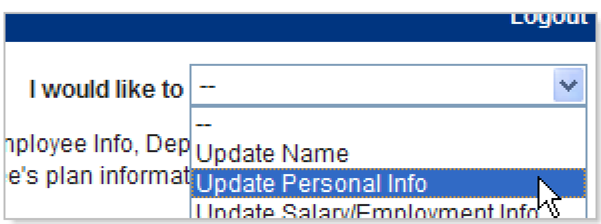
   - Right-click on the employee's name from the navigation pane and select **Update Personal Info**.




   - 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**.

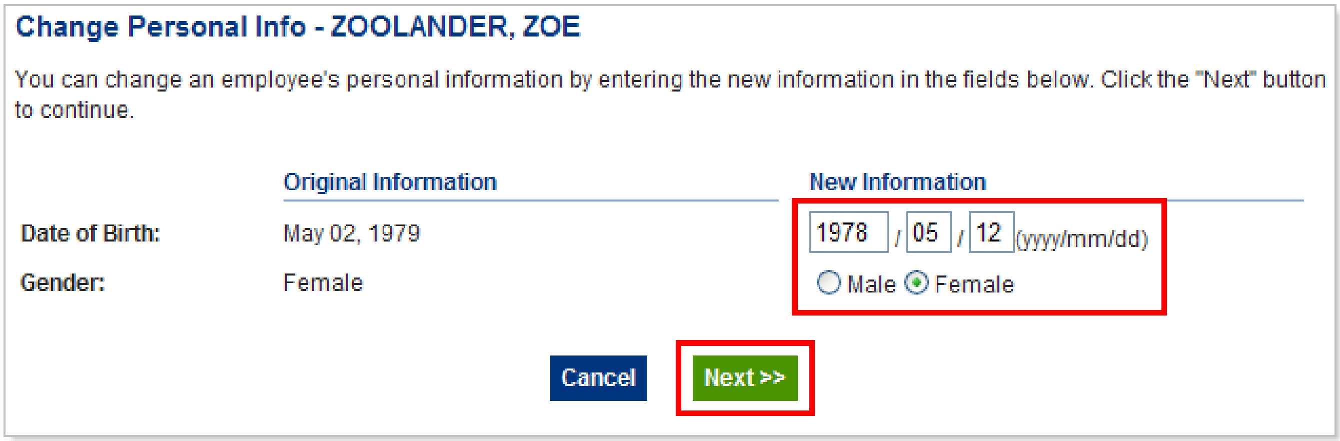



   - At the top right of the ***Employee Information*** page, click on the down arrow from the **I would like to** drop-down list and select **Update Personal Info**.

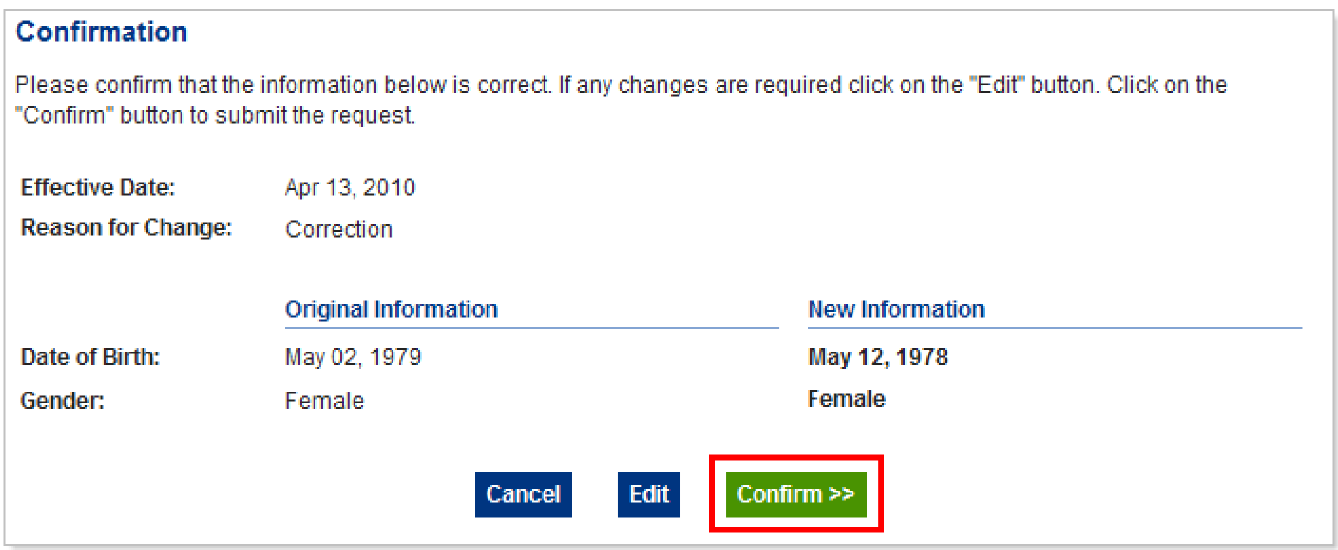


2. You will be taken to the **Change Personal Info** screen. The current **Date of Birth** and **Gender** will be showing under Original Information.

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

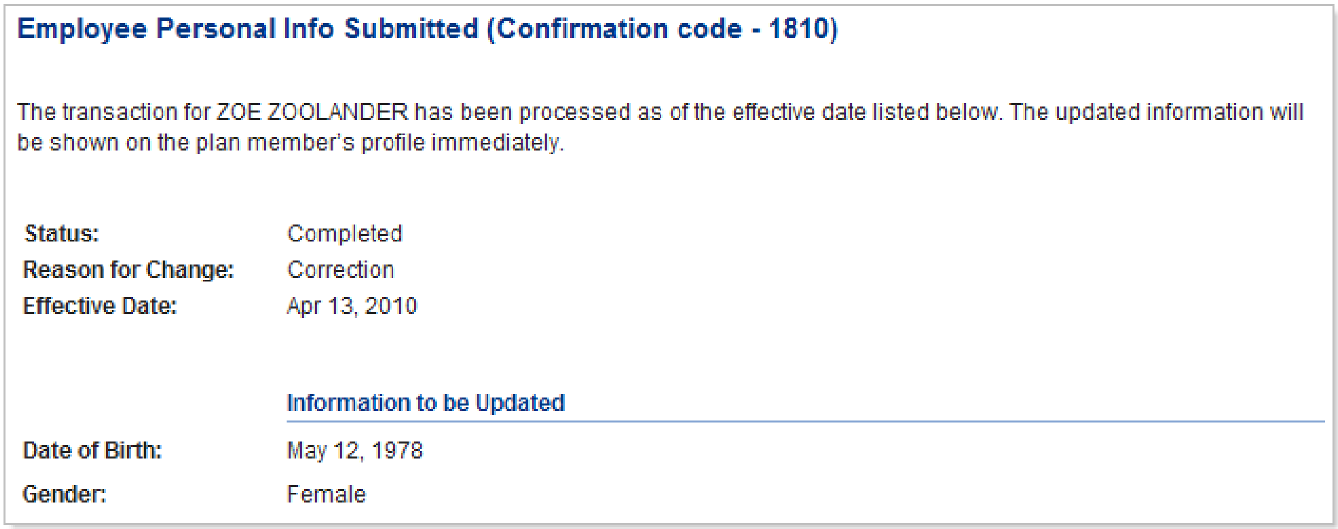



3. In the **Confirmation** screen, double check that all the new information has been entered correctly.

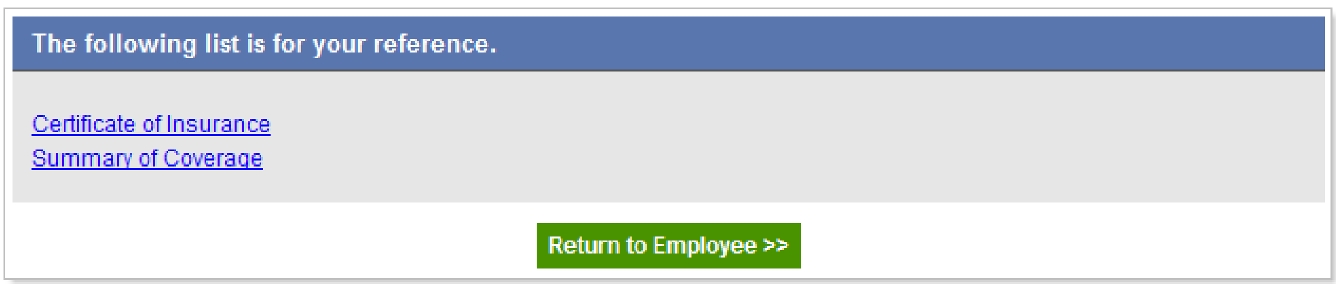



- If you need to make any changes, click on **Edit** to go back to the **Change Personal Info** edit screen.
- If the information is correct, click on **Confirm>>** to complete the changes.

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

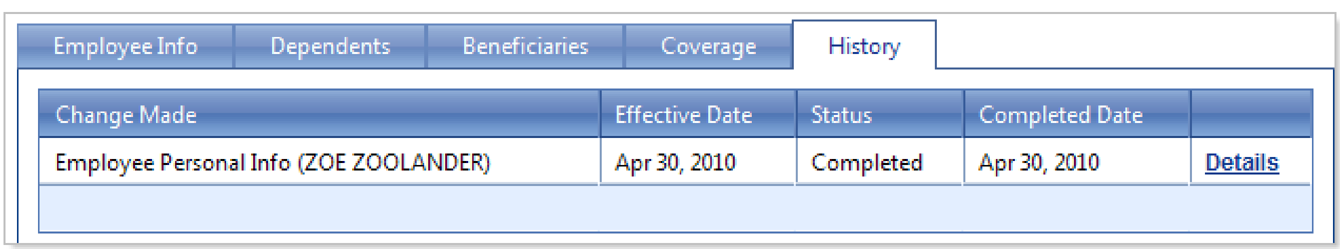



At the bottom of the page, documents are listed for your reference.




- Click on the **Certificate of Insurance** link to view an updated <u>Certificate of Insurance</u> for the employee.
- Click on the **Summary of Coverage** link to view an updated <u>Summary of Coverage</u> 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 **<u>Employee Personal Info Submitted</u>** screen.

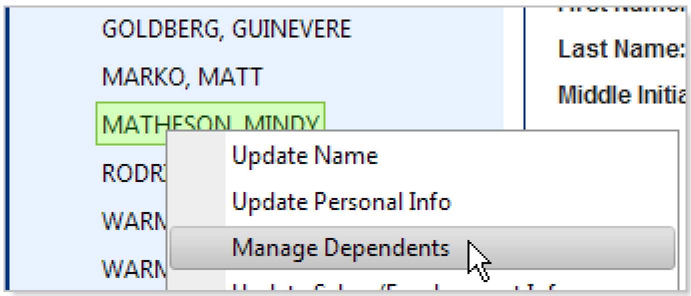


## Dependent Personal Information Changes

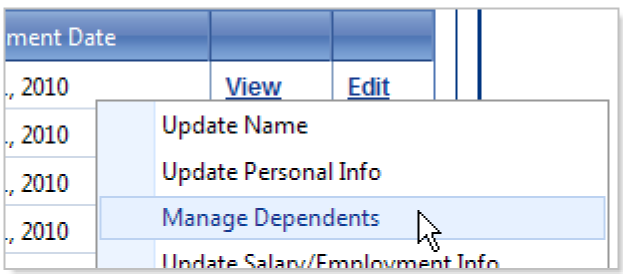
A dependent's personal information may be updated directly online. This can include changes to a dependent's name or correcting a dependent's gender, date of birth, or dependent type if it was entered incorrectly.

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

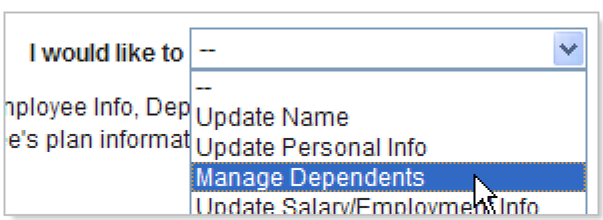
    - Right-click on the employee name from the navigation pane and select **Manage Dependents**.




    - 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**.



2. 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.

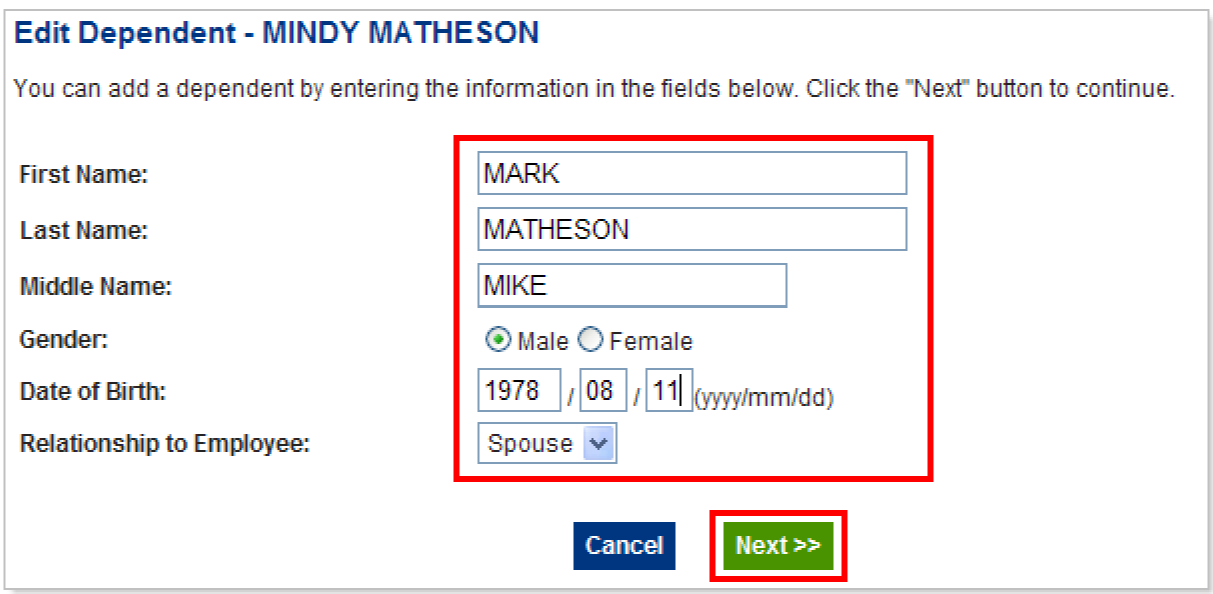
Manage Dependents - MINDY MATHESON

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

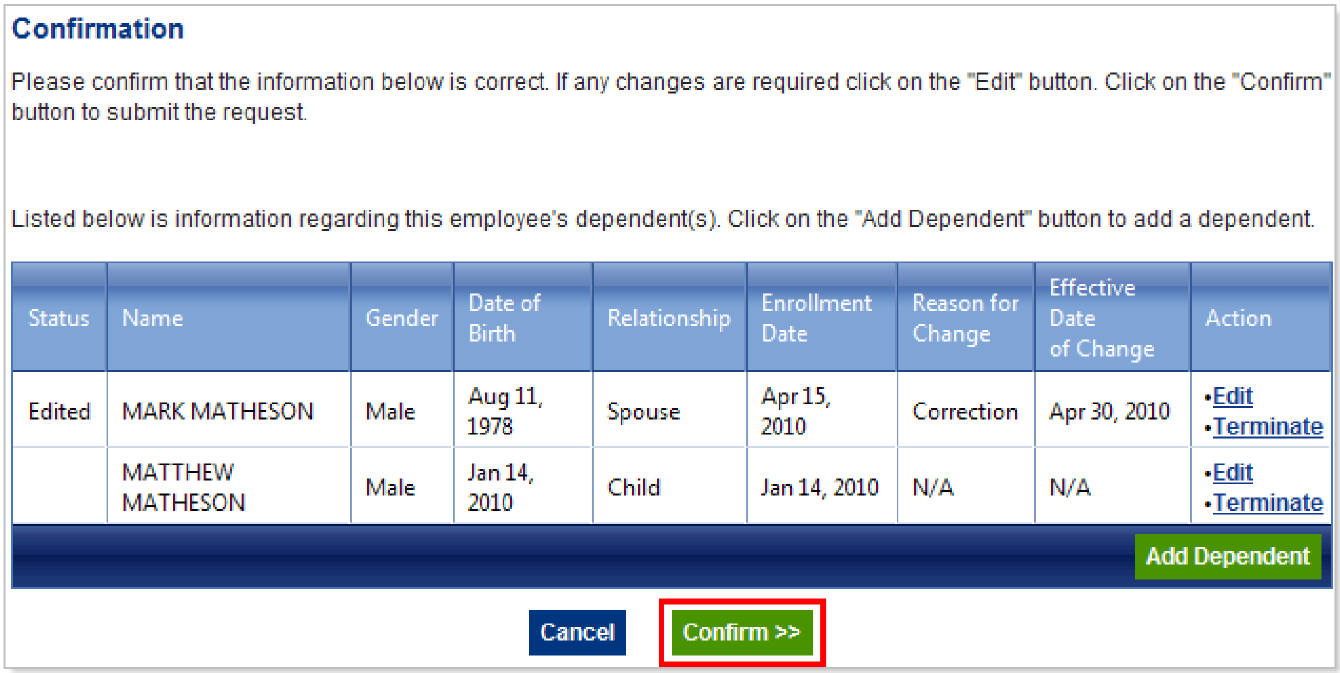
| Status | Name | Gender | Date of Birth | Relationship | Enrollment Date | Reason for Change | Effective Date of Change | Action |
|---|---|---|---|---|---|---|---|---|
| | MARK MATHESON | Male | Aug 11, 1979 | Spouse | Apr 15, 2010 | N/A | N/A | Edit Terminate |
| | MATTHEW MATHESON | Male | Jan 14, 2010 | Child | Jan 14, 2010 | N/A | N/A | Edit Terminate |



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

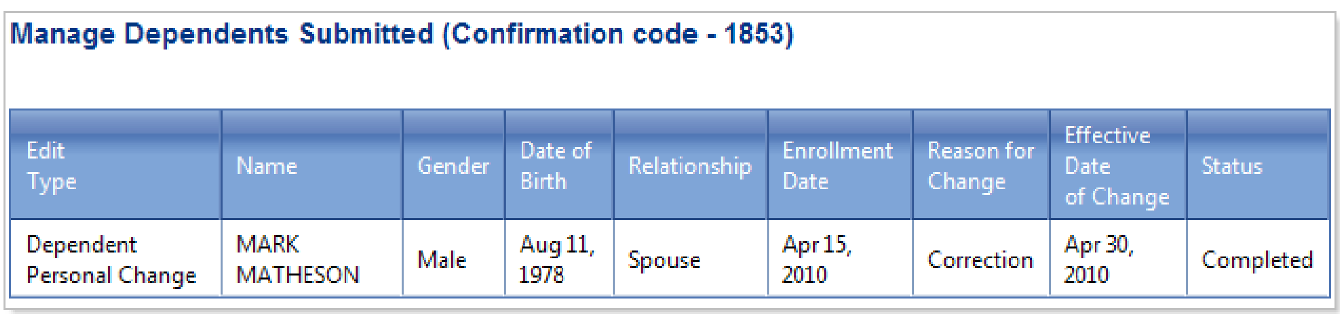
| Status | Name | Gender | Date of Birth | Relationship | Enrollment Date | Reason for Change | Effective Date of Change | Action |
|---|---|---|---|---|---|---|---|---|
| Edited | MARK MATHESON | Male | Aug 11, 1978 | Spouse | Apr 15, 2010 | Correction | Apr 30, 2010 | •Edit •Terminate |
| | MATTHEW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

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.



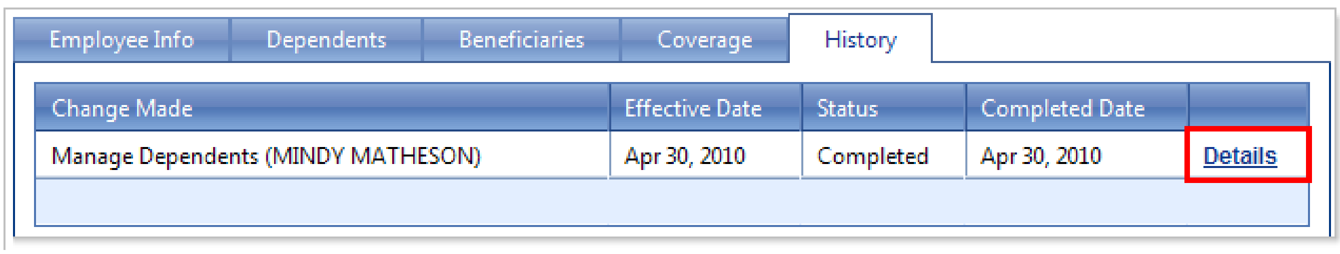
Manage Dependents Submitted (Confirmation code - 1853)

| 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 |

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


- 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.

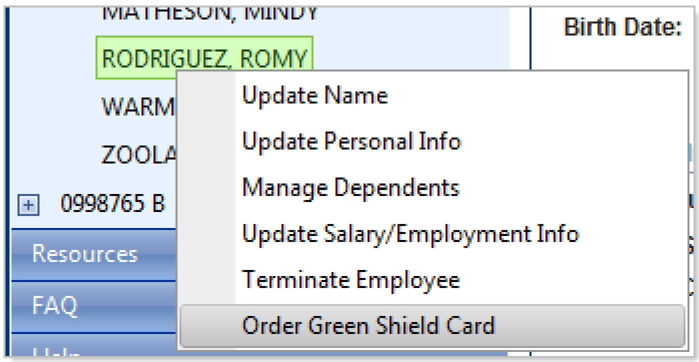


## Green Shield Cards

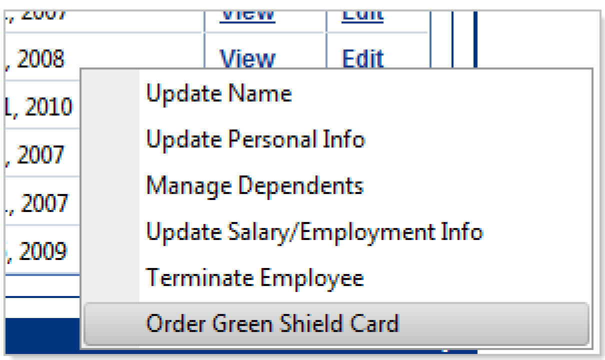
An employee's Green Shield Card may be re-ordered directly online. This can only be done for active employees with Health and/or Dental coverage.

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

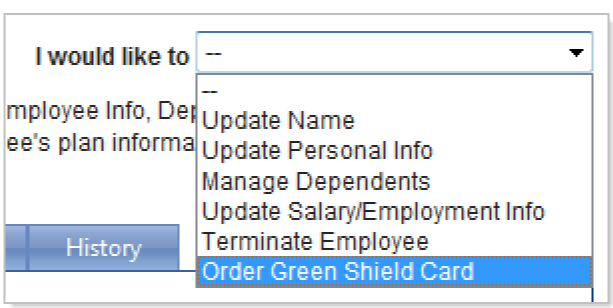
   - Right-click on the employee name from the navigation pane and select **Order Green Shield Card**.



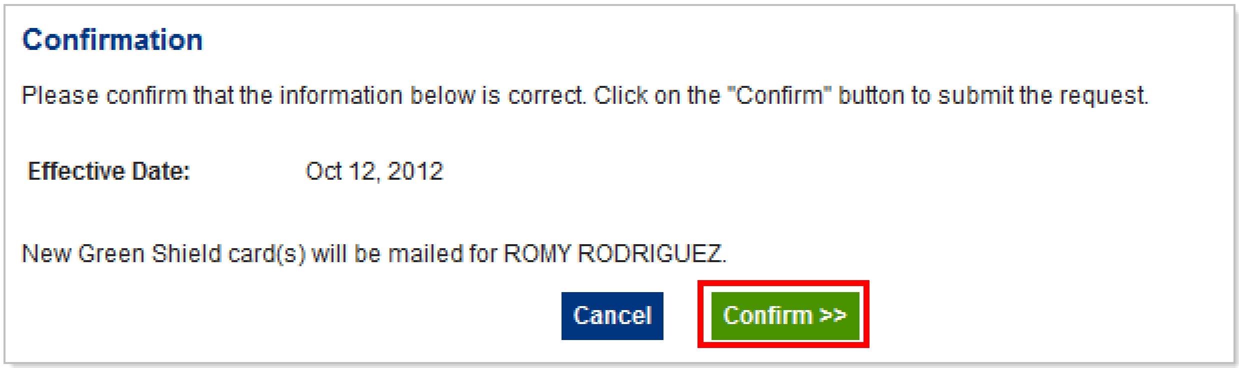

   - Go to the **Employees** tab on the ***Policy Information*** page, locate the employee from the list and click on **Edit** on the right. Select **Order Green Shield Card**.



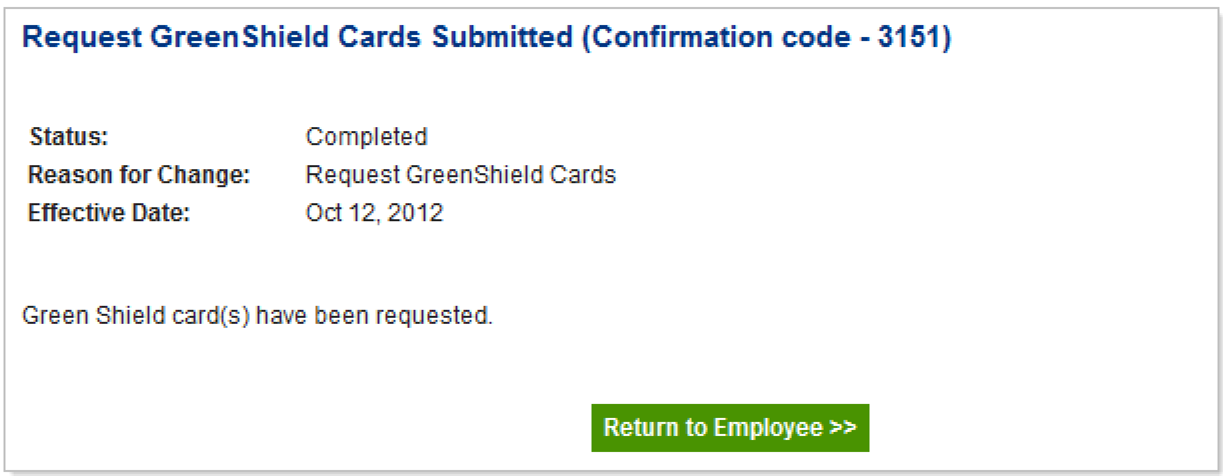

   - At the top right of the ***Employee Information*** page, click on the down arrow from the **I would like to** drop-down list and select **Order Green Shield Card**.



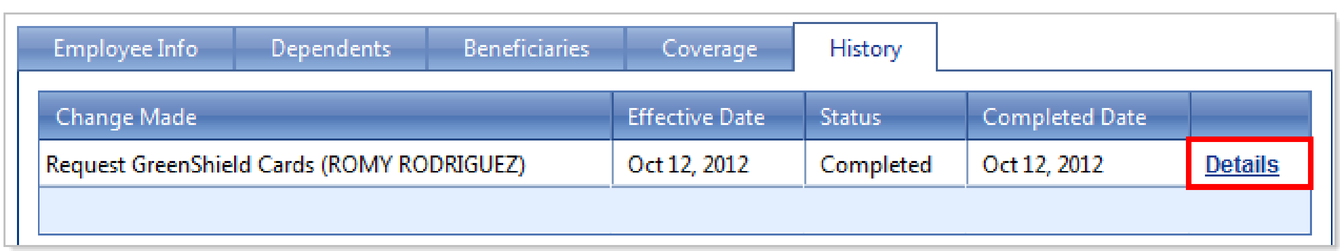
2. The **Confirmation** screen will appear. Click on the **Confirm>>** button to complete the request.




3. 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.




4. 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.



# Terminations

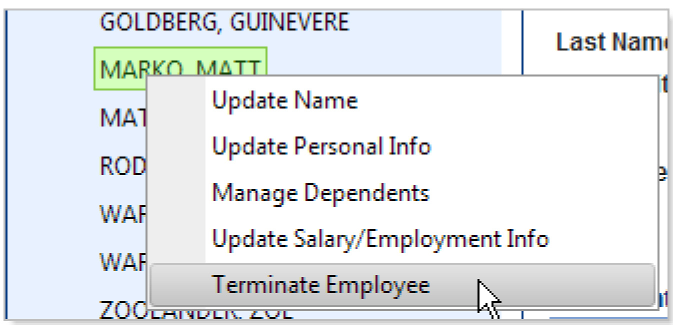
## Employee Terminations

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.

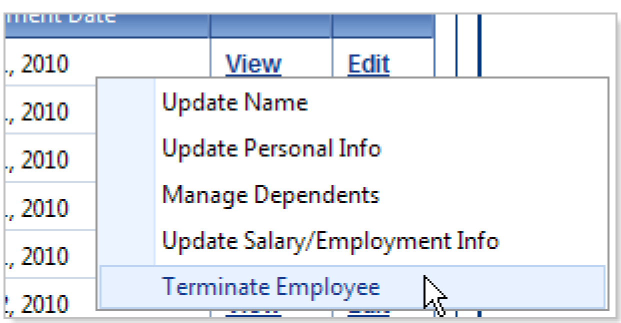
> For further information regarding when an employee's coverage will terminate, please refer to the Termination section of your Administration Guide.

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

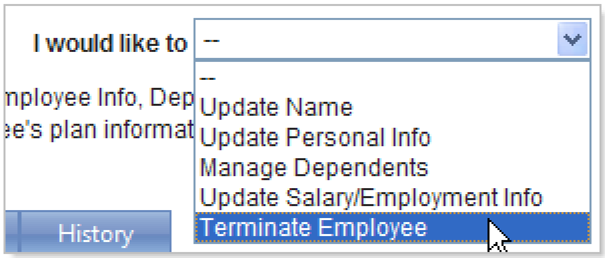
   - Right-click on the employee's name from the navigation pane and select **Terminate Employee**.



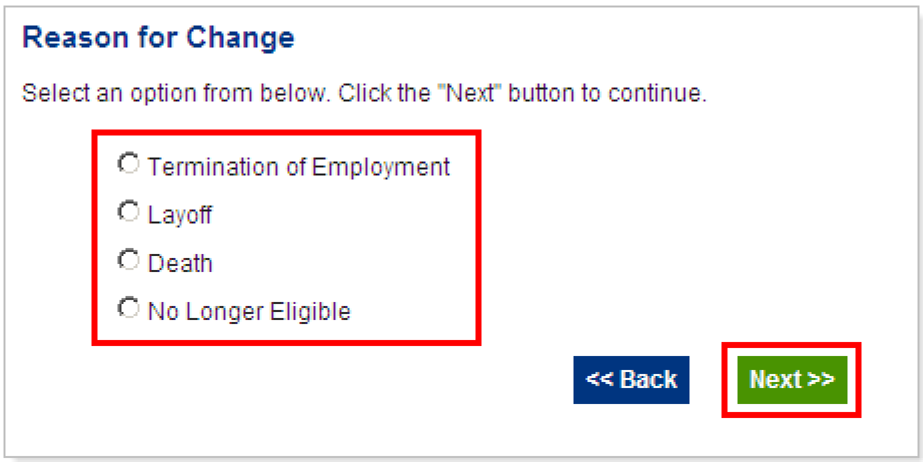

   - Go to the **Employees** tab on the ***Policy Information*** page, locate the employee from the list and click on **Edit** on the right. Select **Terminate Employee**.



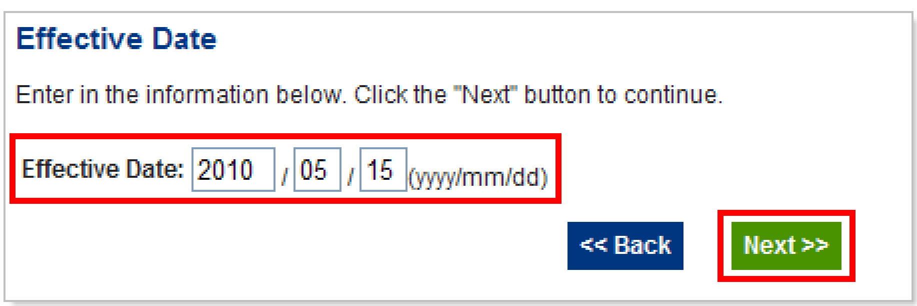

   - At the top right of the ***Employee Information*** page, click on the down arrow from the **I would like to** drop-down list and select **Terminate Employee**.



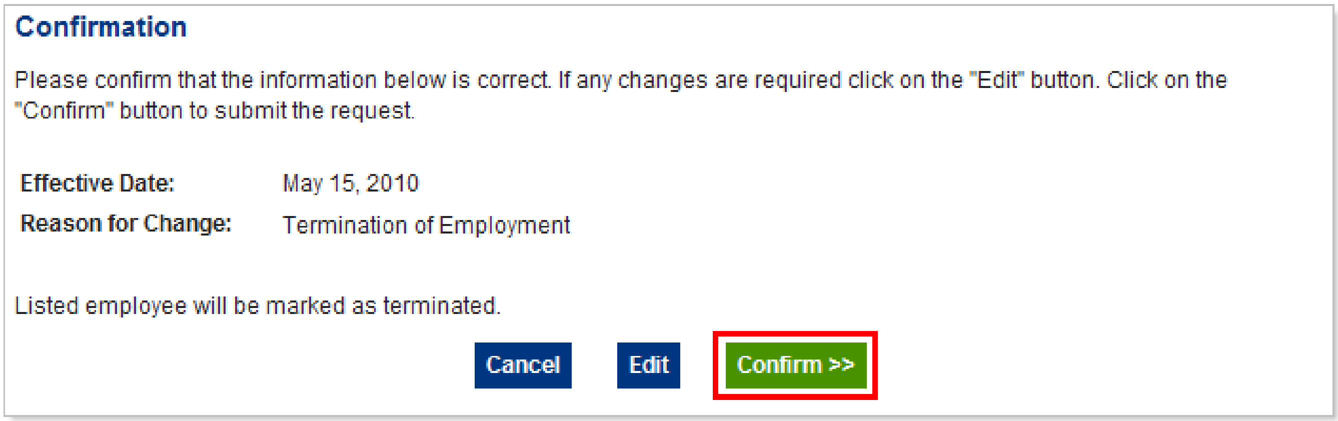

2. You will be taken to the **Reason for Change** screen. Select the appropriate option from the list and click on **Next>>**.




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.



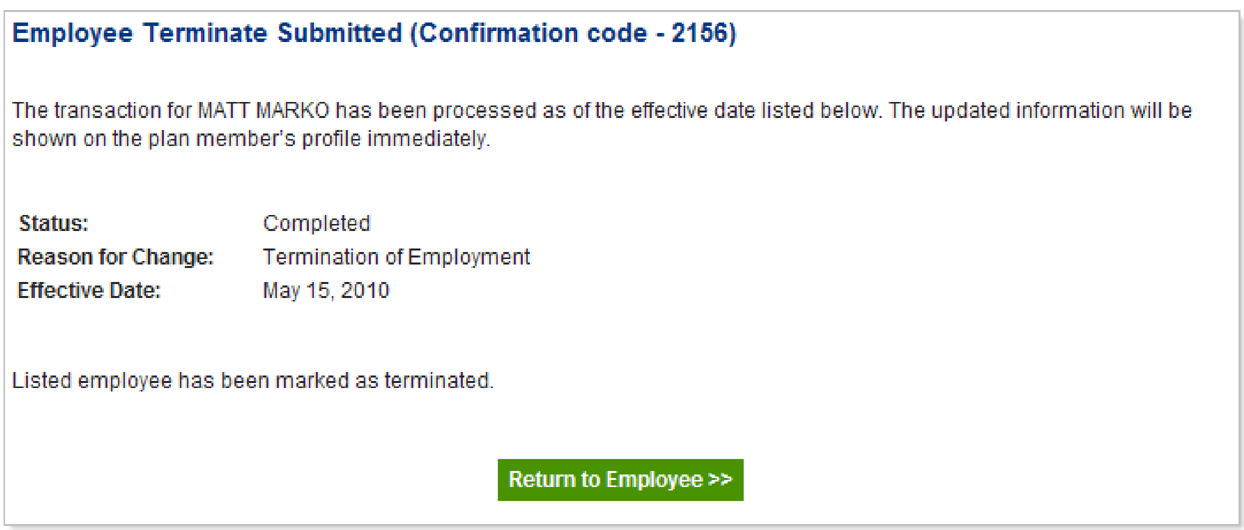
4. The **<u>Confirmation</u>** screen will appear next. If the employee has dependents, you will receive a warning at the bottom of the screen reminding you that the dependents will also be terminated.




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

5. Once you click **Confirm>>**, the **<u>Employee Terminate Submitted</u>** screen will appear.
**<u>Note:</u>** 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.



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 |

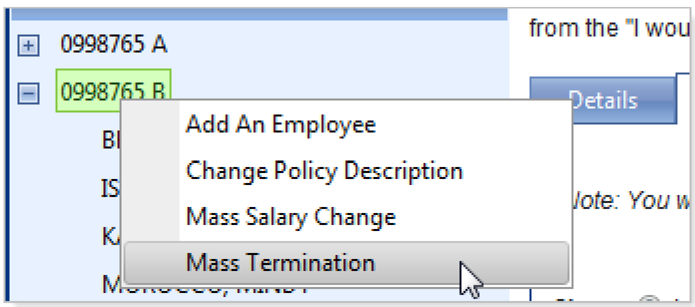
Listed employee has been marked as terminated.

## Mass Employee Terminations

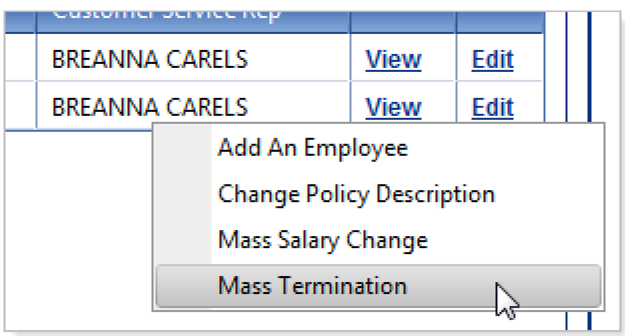
If there are several employee terminations to perform, they can be done online using the Mass Termination feature. All active dependents for the employee will be terminated at the same time as the employee. If the effective date of the termination is more than 3 days in the future, the employee termination 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:

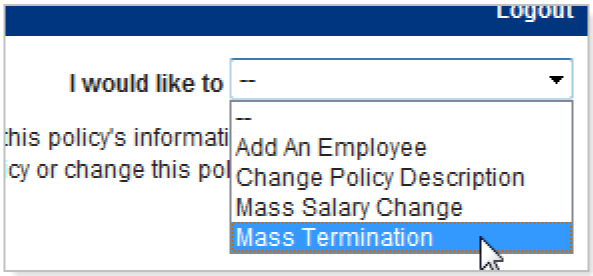
   a. Right-click on the Policy number/description from the navigation pane and select **Mass Termination** from the pop-up menu.

   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.

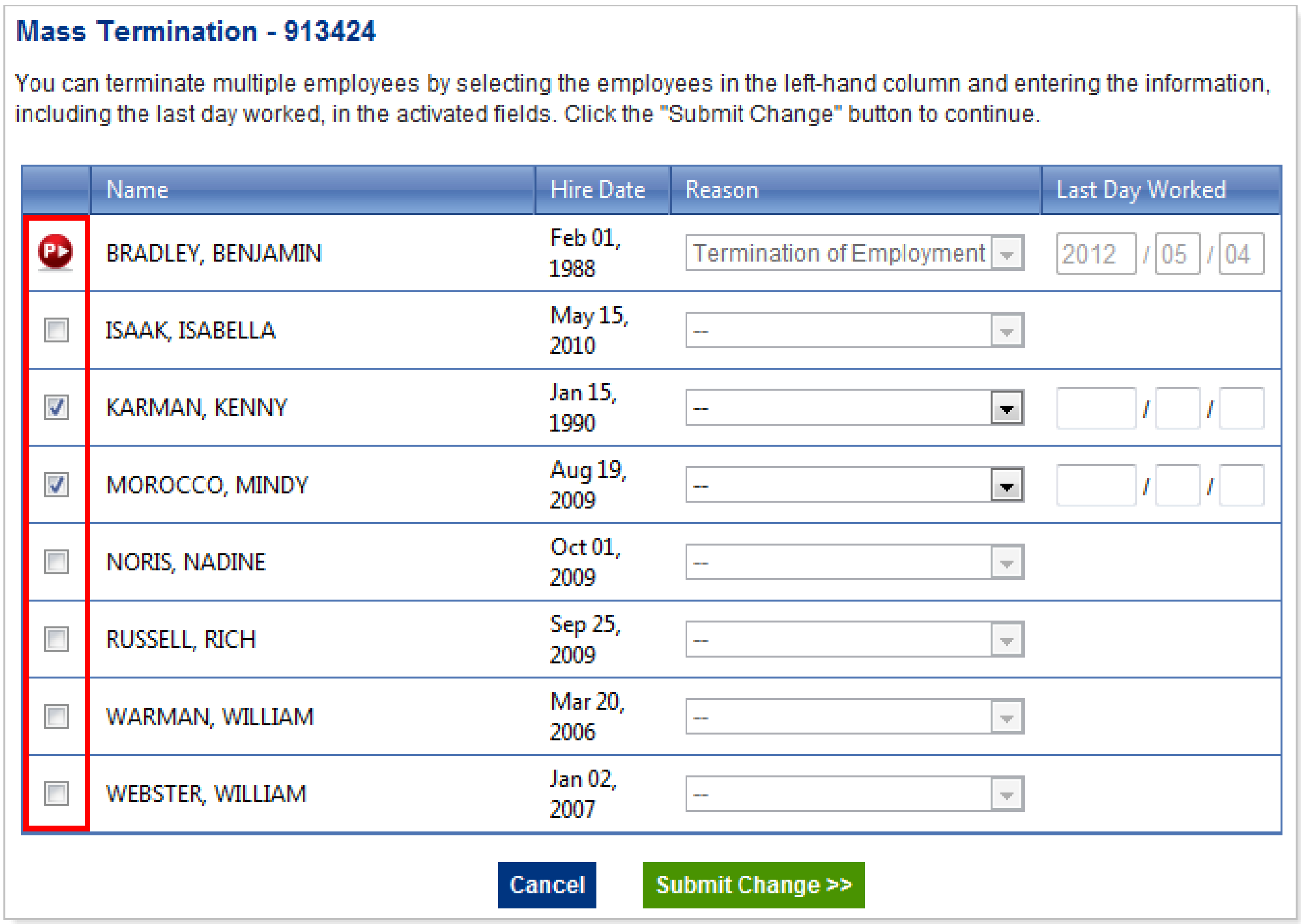
   
   

   c. While viewing the ***Policy Information*** page, at the top right, click on the down arrow from the **I would like to** drop-down list and select **Mass Termination**.




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

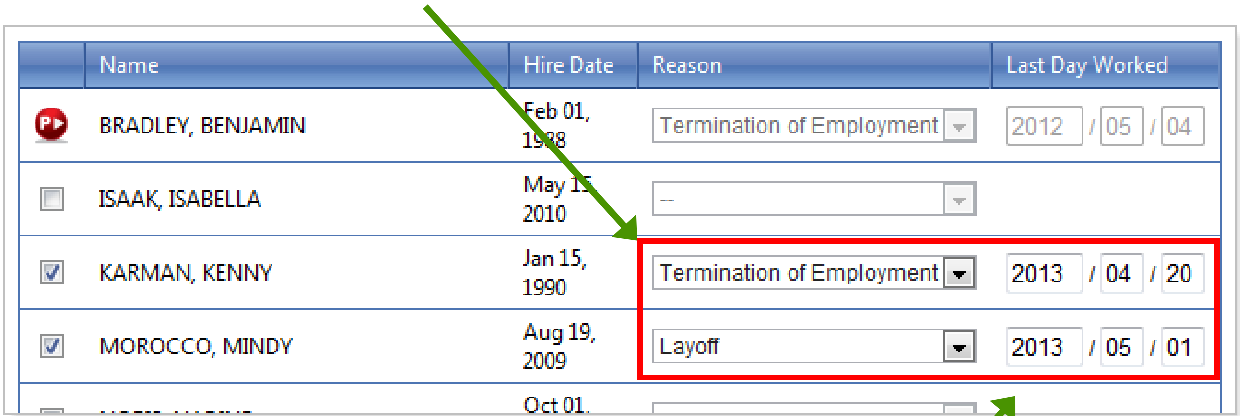
   Click the checkboxes in front of the employees to be terminated.




**Note:** The 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 in front of their name) or those on survivor benefits (has an in front of their name).

3. For each employee with a checkmark:

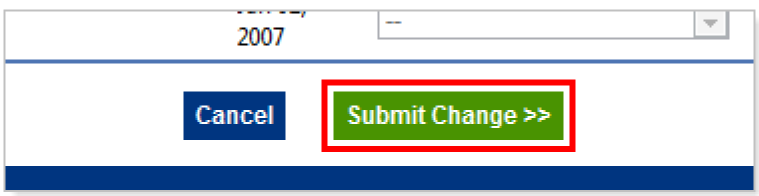
   a. Select the **Reason** for termination.




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

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

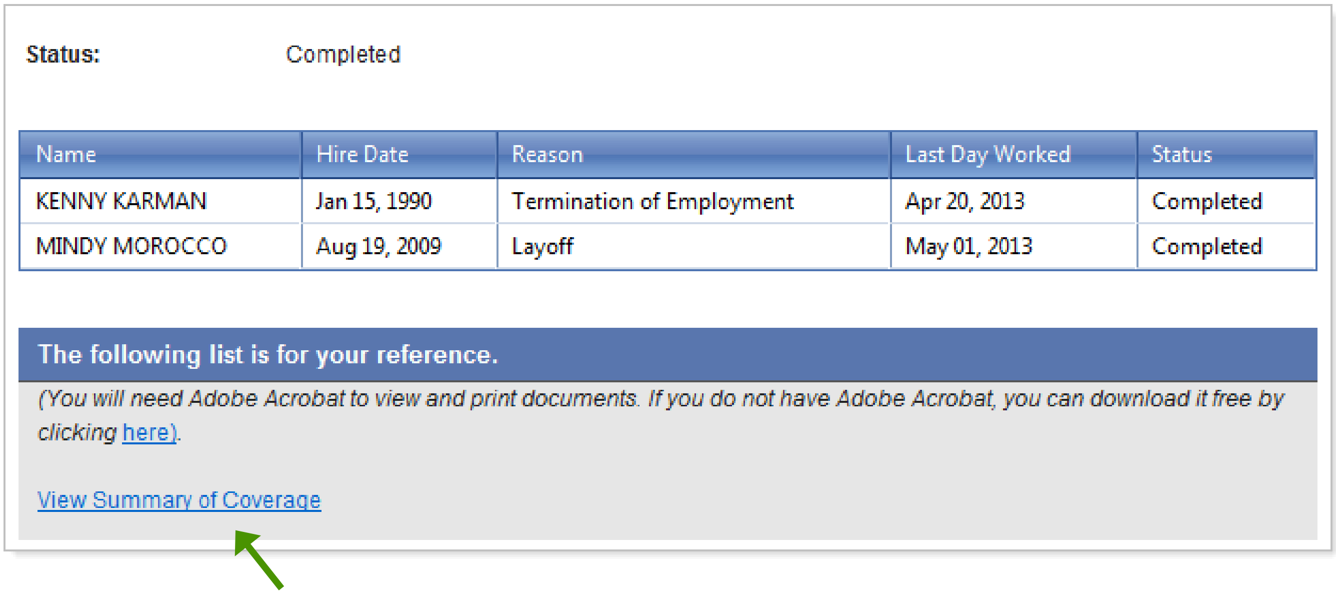
4. Once the information has been entered for the selected employees, click on **Submit Change>>**.




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.


- 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.

6. Once you click **Confirm>>**, the **<u>Mass Termination Submitted</u>** 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***.
   <u>Note:</u> 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 |

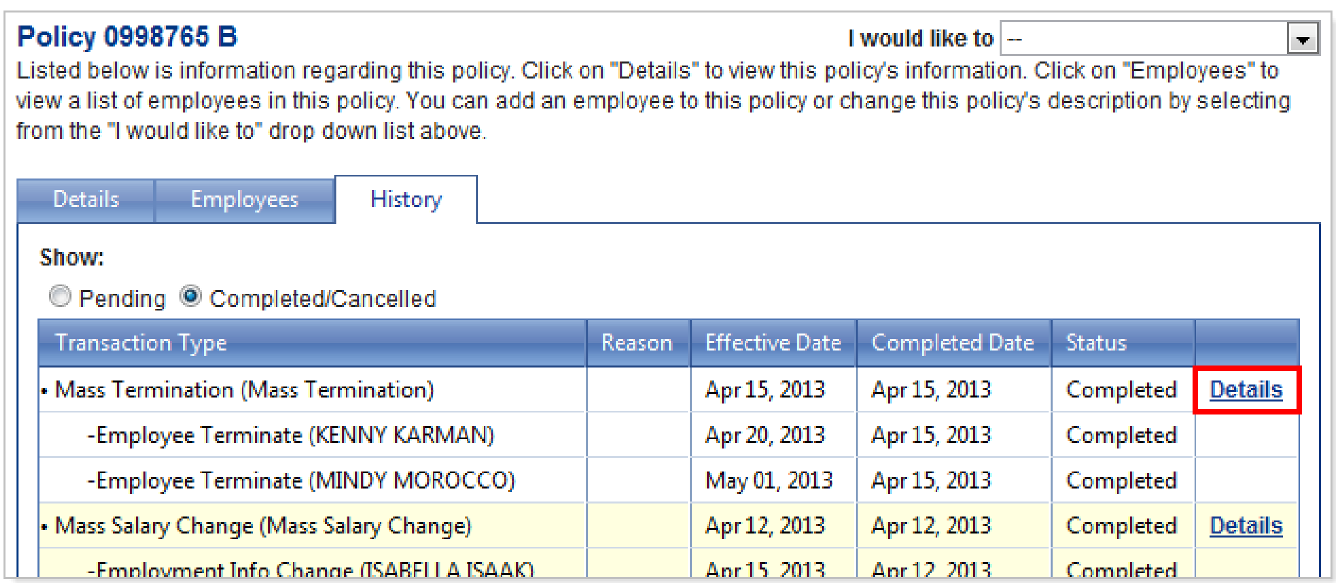
**The following list is for your reference.**

*(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 <u>Summary of Coverage</u> 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 **<u>Mass Termination Submitted</u>** 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

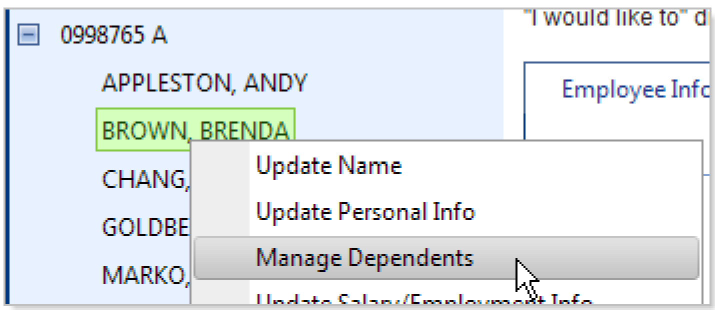
| Transaction Type | Reason | Effective Date | Completed Date | Status | |
|---|---|---|---|---|---|
| • Mass Termination (Mass Termination) | | Apr 15, 2013 | Apr 15, 2013 | Completed | Details |
| -Employee Terminate (KENNY KARMAN) | | Apr 20, 2013 | Apr 15, 2013 | Completed | |
| -Employee Terminate (MINDY MOROCCO) | | May 01, 2013 | Apr 15, 2013 | Completed | |
| • Mass Salary Change (Mass Salary Change) | | Apr 12, 2013 | Apr 12, 2013 | Completed | Details |
| -Employment Info Change (ISABELLA ISAAK) | | Apr 15, 2013 | Apr 12, 2013 | Completed | |

## Dependent Terminations

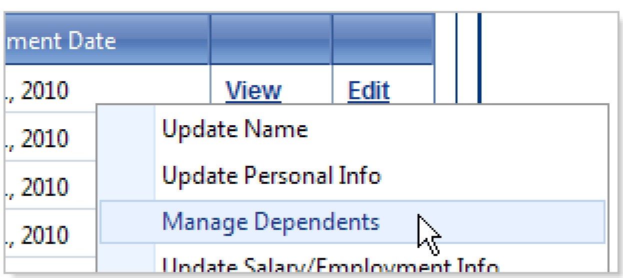
Dependent terminations may be performed directly online. If an employee has only one active dependent, their **Family Status** will automatically change to ***Single*** effective on the effective date of the dependent termination. If the effective date of the termination is more than 3 days in the future, 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:

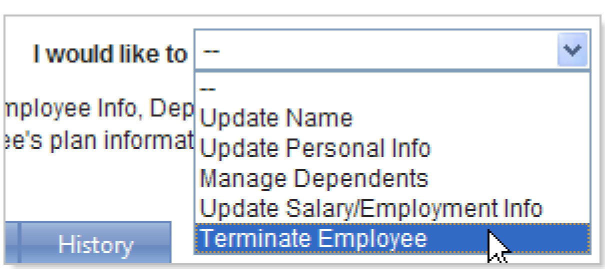
    - Right-click on the employee name from the navigation pane and select **Manage Dependents**.



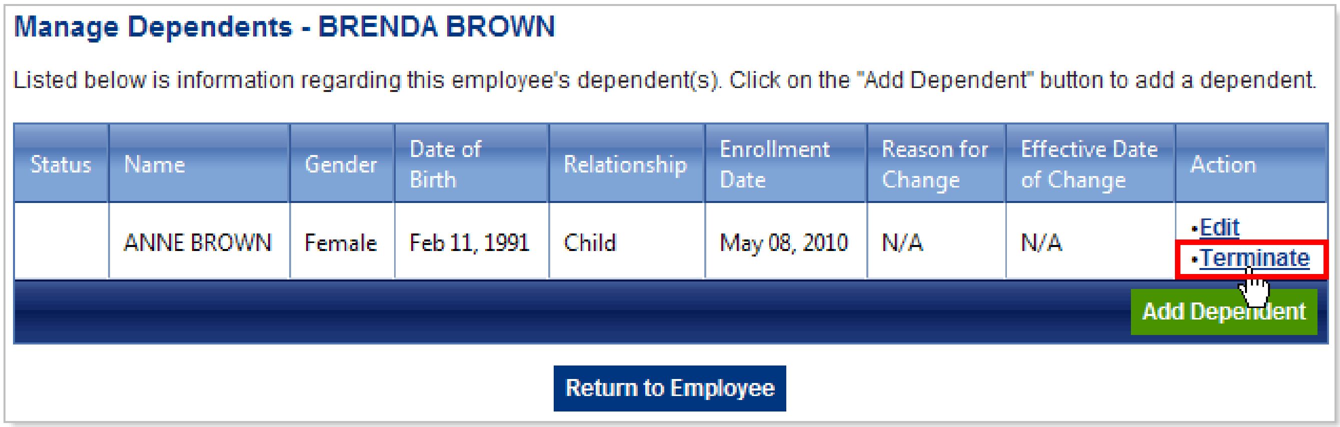

    - Go to the **Employees** tab on the ***Policy Information*** page, locate the employee from the list and click on **Edit** on the right. Select **Manage Dependents**.




    - 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**.



2. 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.

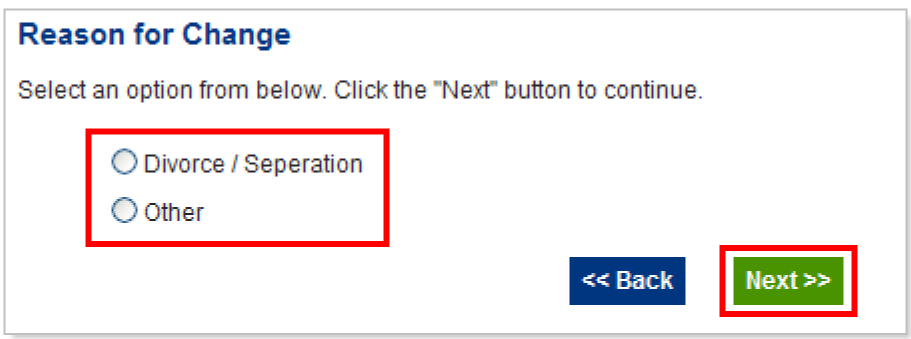
| Status | Name | Gender | Date of Birth | Relationship | Enrollment Date | Reason for Change | Effective Date of Change | Action |
|---|---|---|---|---|---|---|---|---|
| | ANNE BROWN | Female | Feb 11, 1991 | Child | May 08, 2010 | N/A | N/A | •Edit •Terminate |

Add Dependent

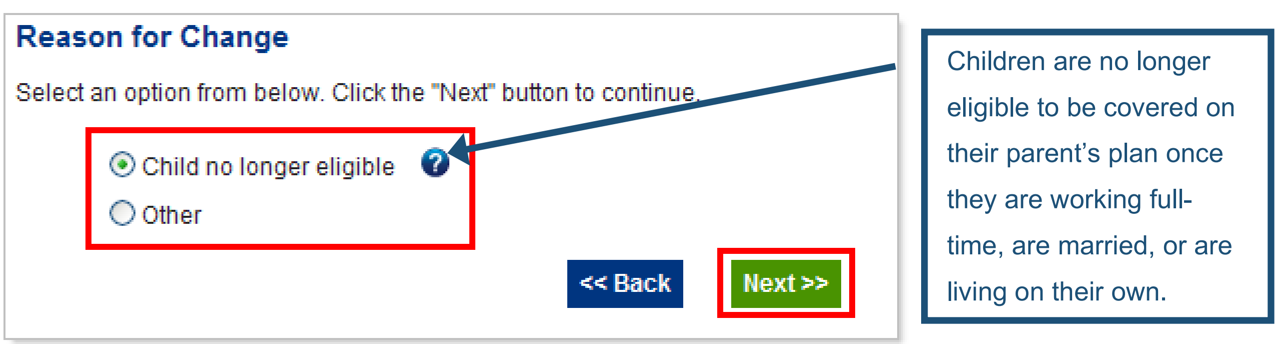
Return to Employee

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

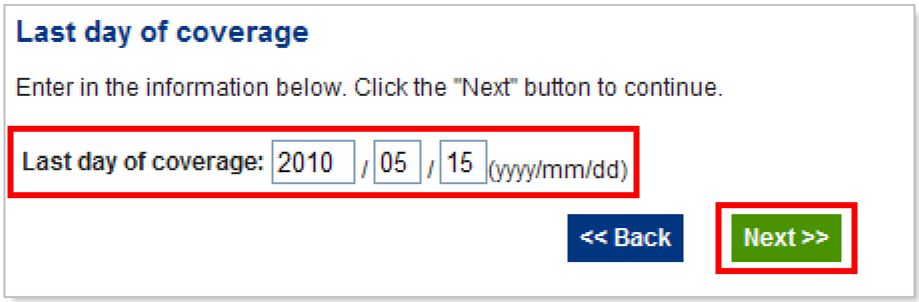
- If you are terminating a **Spouse**, you will see the following options:



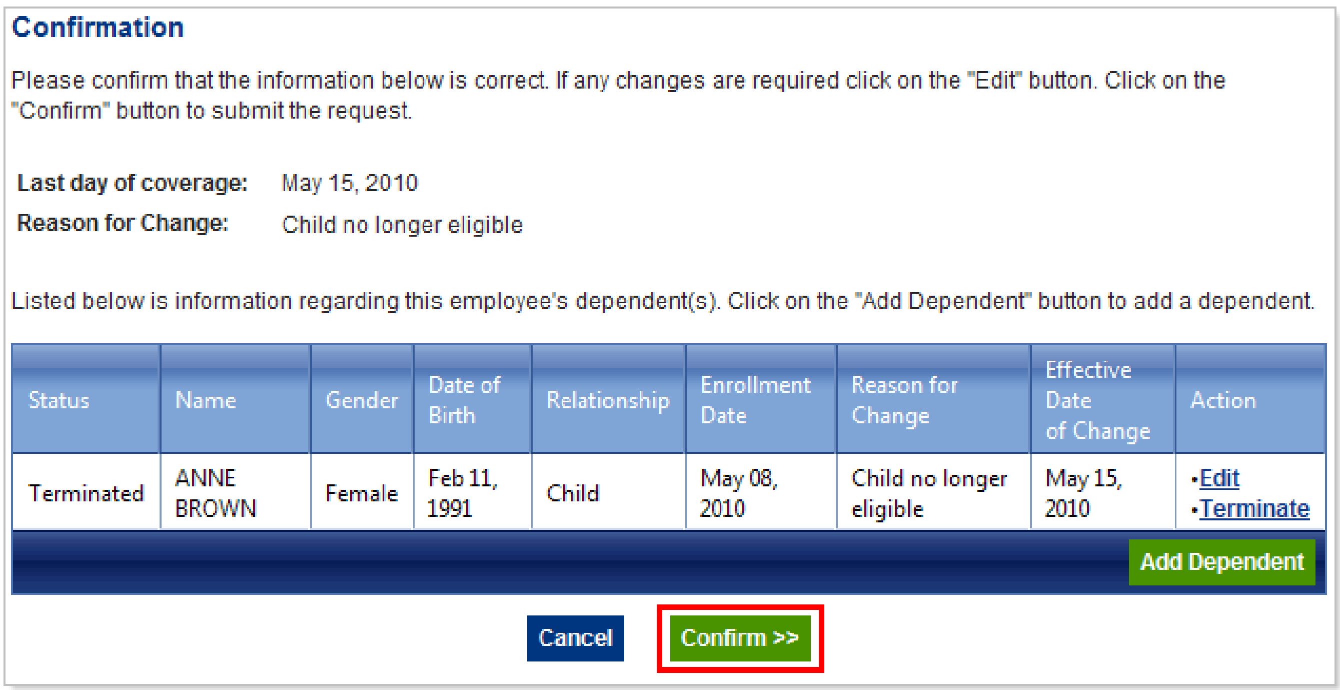

- If you are terminating a **Child**, you will see the following options



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




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




| 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 | •Edit •Terminate |

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

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 |

7. 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

View Summary of Coverage    View Certificate of Insurance

| 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 | $ . |
| **Total Premium** | | | | **$ .** |

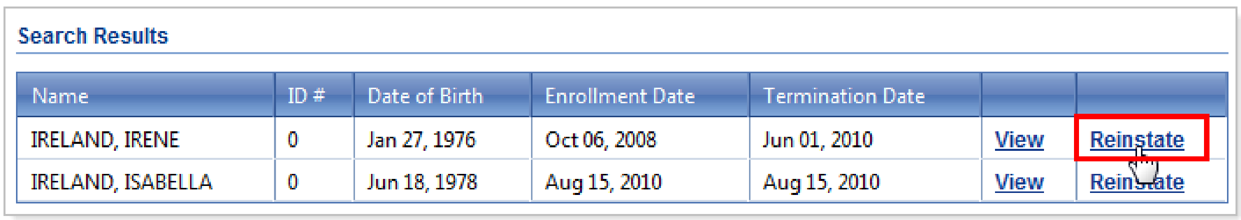
8. On the employee's **History** tab, the dependent termination will be listed. You can click on **Details** to again view the **Manage Dependents Submitted** screen.

## Employee 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:

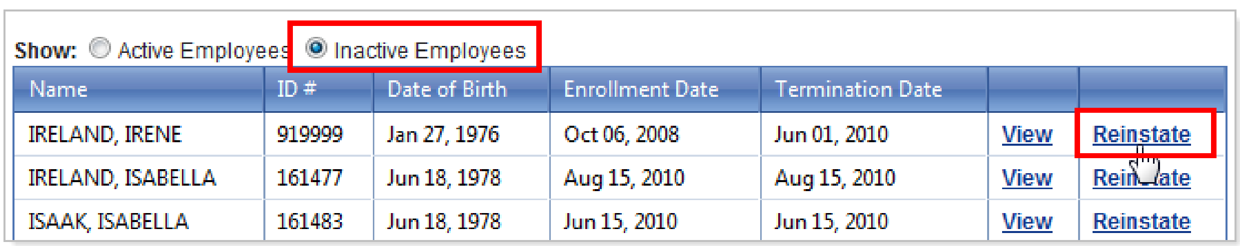
    - Click on the ***Employee Search*** page to search for the employee.  In the search results, for terminated employees, you can click on **Reinstate** to the right of the employee.



Search Results

| Name | ID # | Date of Birth | Enrollment Date | Termination Date | | |
|---|---|---|---|---|---|---|
| IRELAND, IRENE | 0 | Jan 27, 1976 | Oct 06, 2008 | Jun 01, 2010 | View | Reinstate |
| IRELAND, ISABELLA | 0 | Jun 18, 1978 | Aug 15, 2010 | Aug 15, 2010 | View | Reinstate |

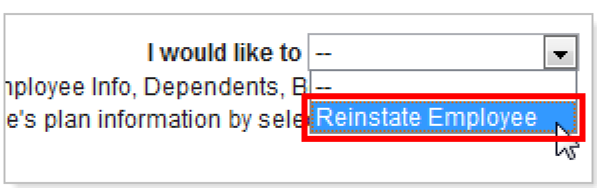
    - Go to the **Employees** tab on the ***Policy Information*** page then select **Inactive Employees** to view the list of terminated employees.  Click on **Reinstate** to the right of the employee.



Show: Active Employees Inactive Employees

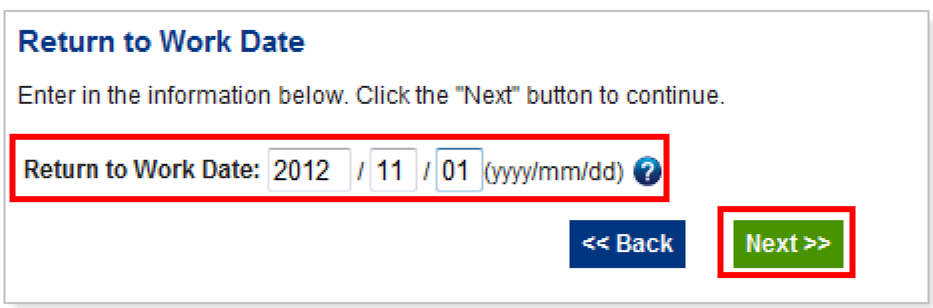
| Name | ID # | Date of Birth | Enrollment Date | Termination Date | | |
|---|---|---|---|---|---|---|
| IRELAND, IRENE | 919999 | Jan 27, 1976 | Oct 06, 2008 | Jun 01, 2010 | View | Reinstate |
| IRELAND, ISABELLA | 161477 | Jun 18, 1978 | Aug 15, 2010 | Aug 15, 2010 | View | Reinstate |
| ISAAK, ISABELLA | 161483 | Jun 18, 1978 | Jun 15, 2010 | Jun 15, 2010 | View | Reinstate |

    - 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**.

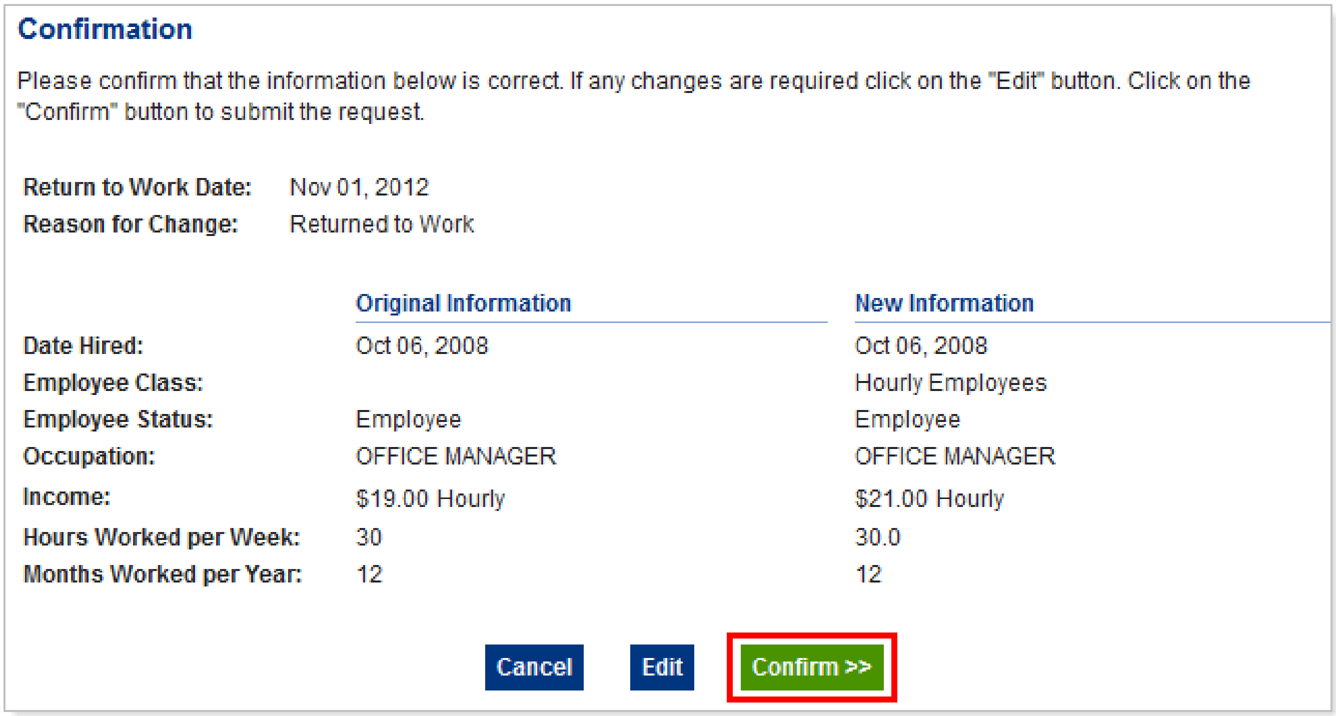


2. You will be taken to the **Employee Reinstatement** screen. The previous salary information will be listed. Update this information as required then click on **Next>>**.


3. 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.



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 |
|---|---|---|
| **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 | $21.00 Hourly |
| **Hours Worked per Week:** | 30 | 30.0 |
| **Months Worked per Year:** | 12 | 12 |

Cancel Edit Confirm >>

- 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

6. 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.

Employee Info | Dependents | Beneficiaries | Coverage | History

View Certificate of Insurance  View Summary of Coverage

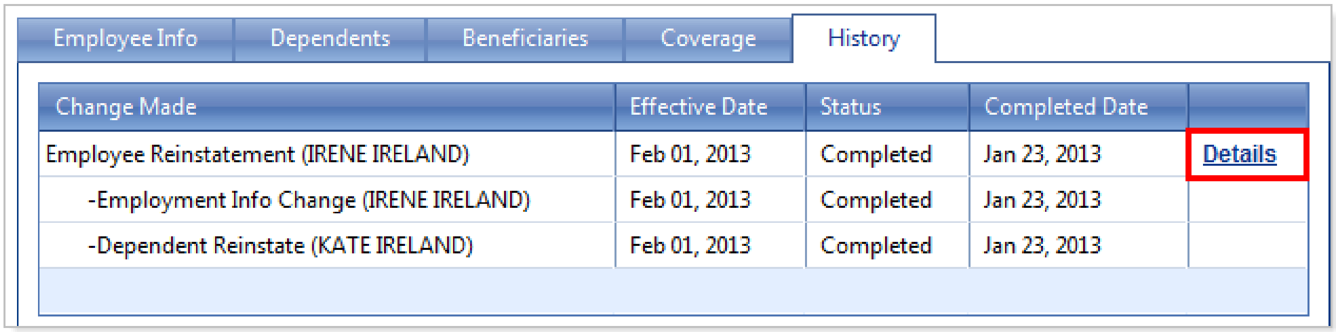
*(Note: You will need Adobe Reader to view and print the above links. If you do not have Adobe Reader, you can download it free by clicking here.)*

| 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 | $ . |
| **Total Premium** | | | | **$ .** |

**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.

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.



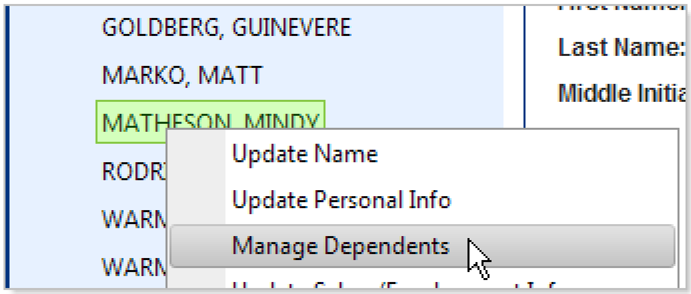

| Change Made | Effective Date | Status | Completed Date | |
|---|---|---|---|---|
| Employee Reinstatement (IRENE IRELAND) | Feb 01, 2013 | Completed | Jan 23, 2013 | Details |
| -Employment Info Change (IRENE IRELAND) | Feb 01, 2013 | Completed | Jan 23, 2013 | |
| -Dependent Reinstate (KATE IRELAND) | Feb 01, 2013 | Completed | Jan 23, 2013 | |

## Dependent Reinstatements

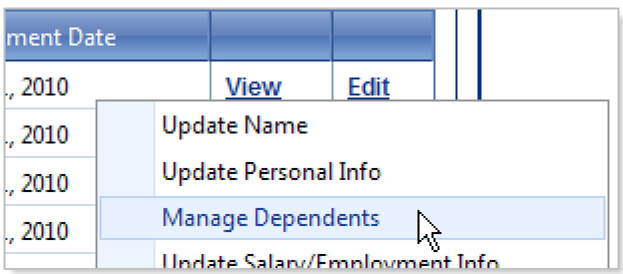
Terminated dependents who were previously on an employee's plan may be reinstated directly online.

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

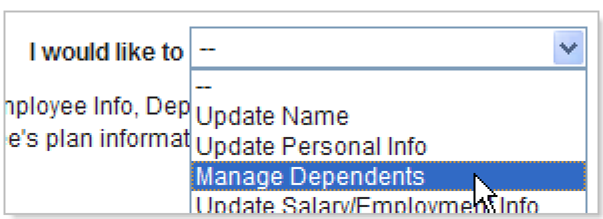
   - Right-click on the employee name from the navigation pane and select **Manage Dependents**.




   - 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**.

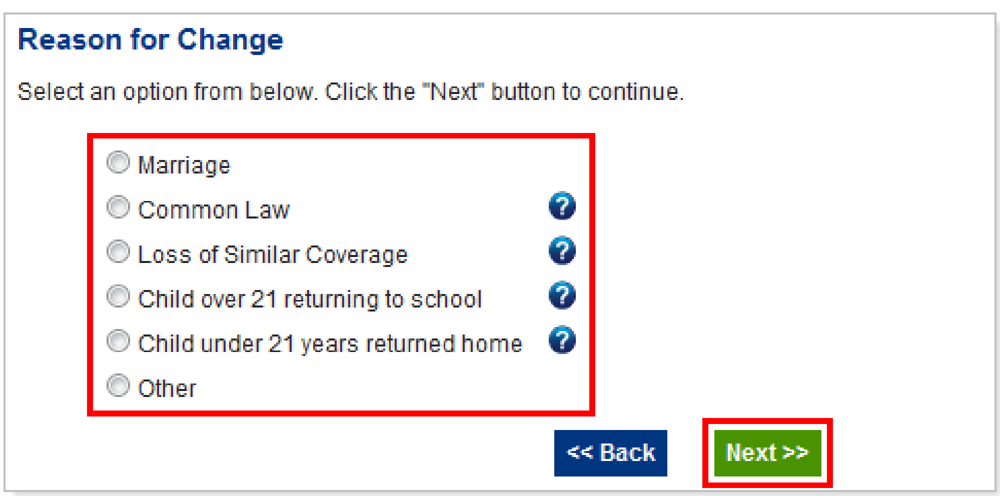


2. You will be taken to the **<u>Manage Dependents</u>** screen where all of the employee's previous dependents will be listed in grey. Click on the **Reinstate** link to the right of the inactive dependent you wish to reinstate.

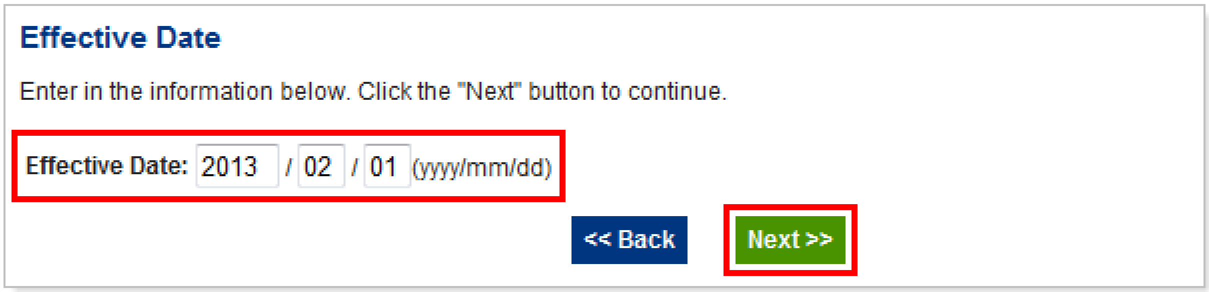

3. In the next screen, select the reason for the dependent addition and click on **Next>>**.

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

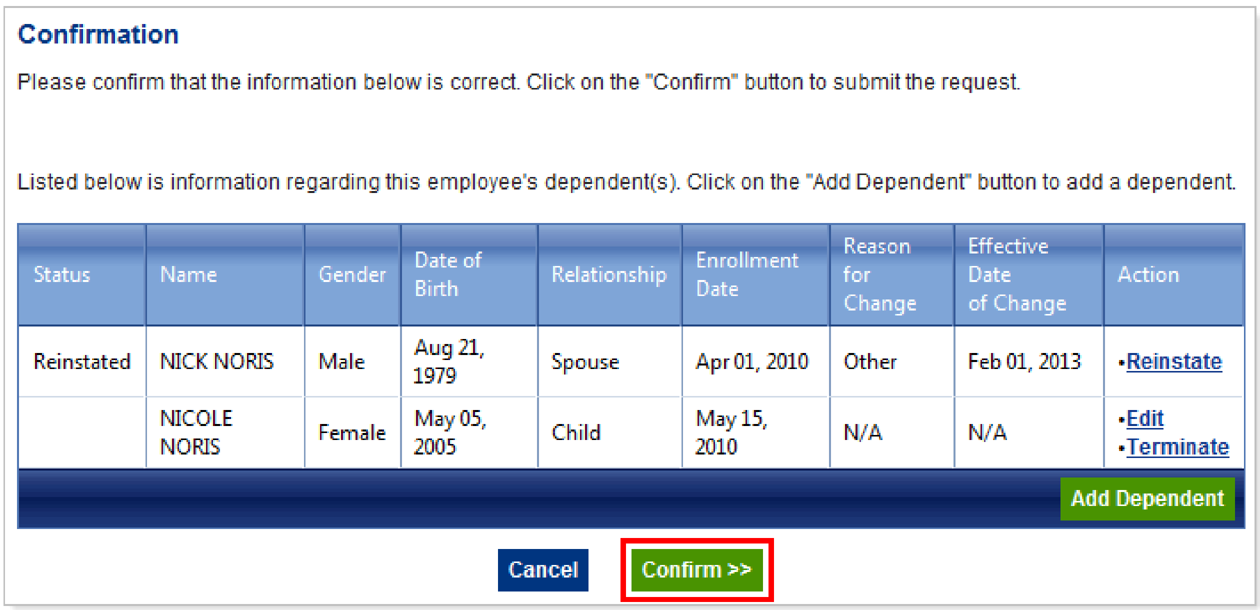

- If you are reinstating a **Child**, you will see the following options:



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>>.**




5. The **<u>Confirmation</u>** screen will appear next.




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

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

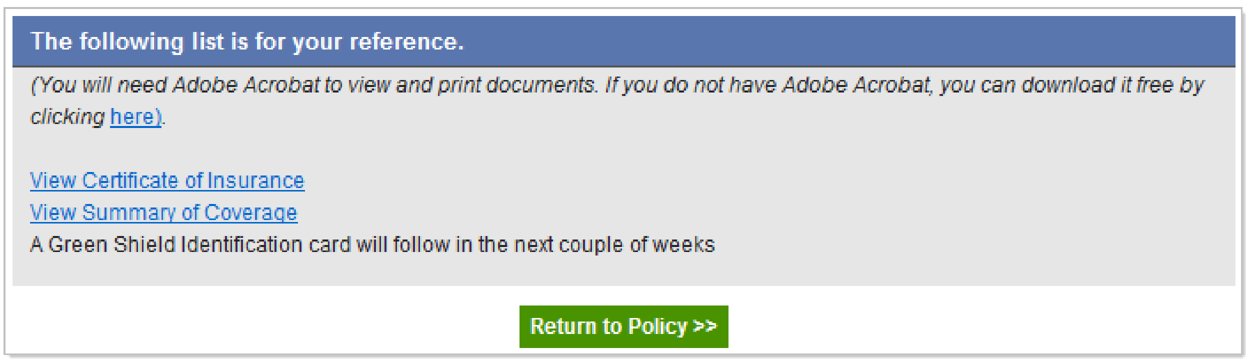
   - If the request was completed successfully, the **Status** of the dependent reinstatement will show as ***Completed***. The **Effective Date** will be automatically calculated based on the dependent information provided. The reinstated dependent will now appear as active in the employee's dependent 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 Reinstate | 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.




- Click on the **Certificate of Insurance** link to view a <u>Certificate of Insurance</u> for the new employee.
- Click on the **Summary of Coverage** link to view a <u>Summary of Coverage</u> 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 Reinstate | NICK NORIS | Male | Aug 21, 1979 | Spouse | Feb 01, 2013 | Other | Feb 01, 2013 | Pending |

Return to Employee >>

7. 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.

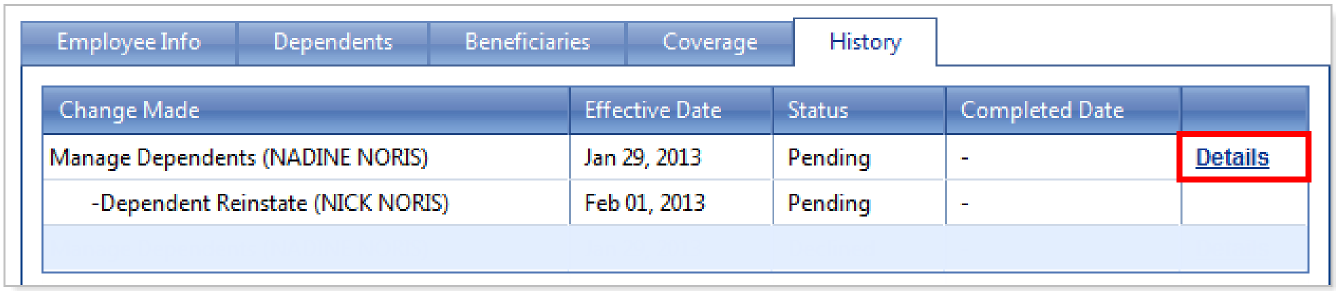
Employee Info | Dependents | Beneficiaries | Coverage | History

View Certificate of Insurance    View 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.)*

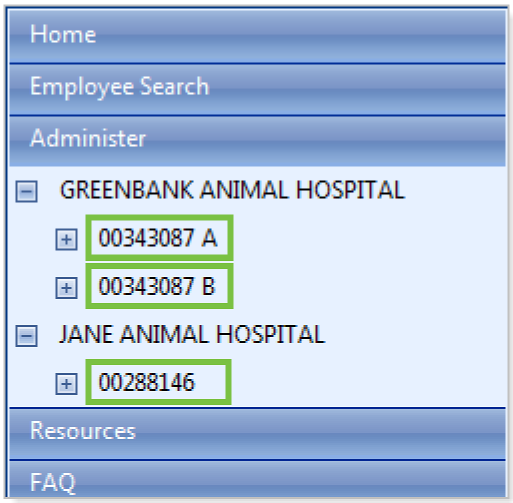
| Benefit | Effective Date | Expiration Date | Coverage | Premium |
|---|---|---|---|---|
| ACCIDENTAL DEATH & DISMEMBERMENT | May 01, 2010 | | $52,000 | $ . |
| LONG TERM DISABILITY | May 01, 2010 | | $1,445 | $ . |
| DENTAL | Feb 01, 2013 | | FAMILY | $ . |
| DEPENDANT LIFE | Feb 01, 2013 | | INCLUDED | $ . |
| 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 | $ . |
| **Total Premium** | | | | **$ .** |

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 Transfers

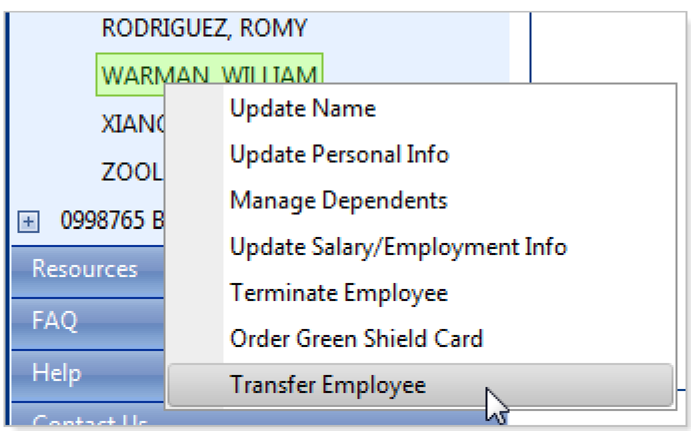
If you are the administrator for more than one policy, you are able to transfer an employee between policies using online administration.



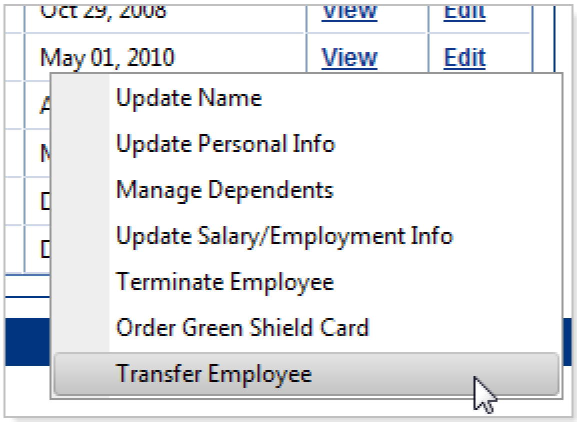

If you administer more than one company account online and/or there are multiple policies per account, you can transfer an employee between any of the listed policies.

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

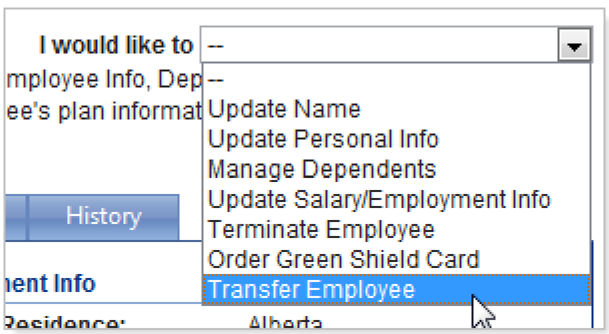
    - Right-click on the employee's name from the navigation pane and select **Transfer Employee**.



- 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** drop-down list and select **Transfer Employee**.



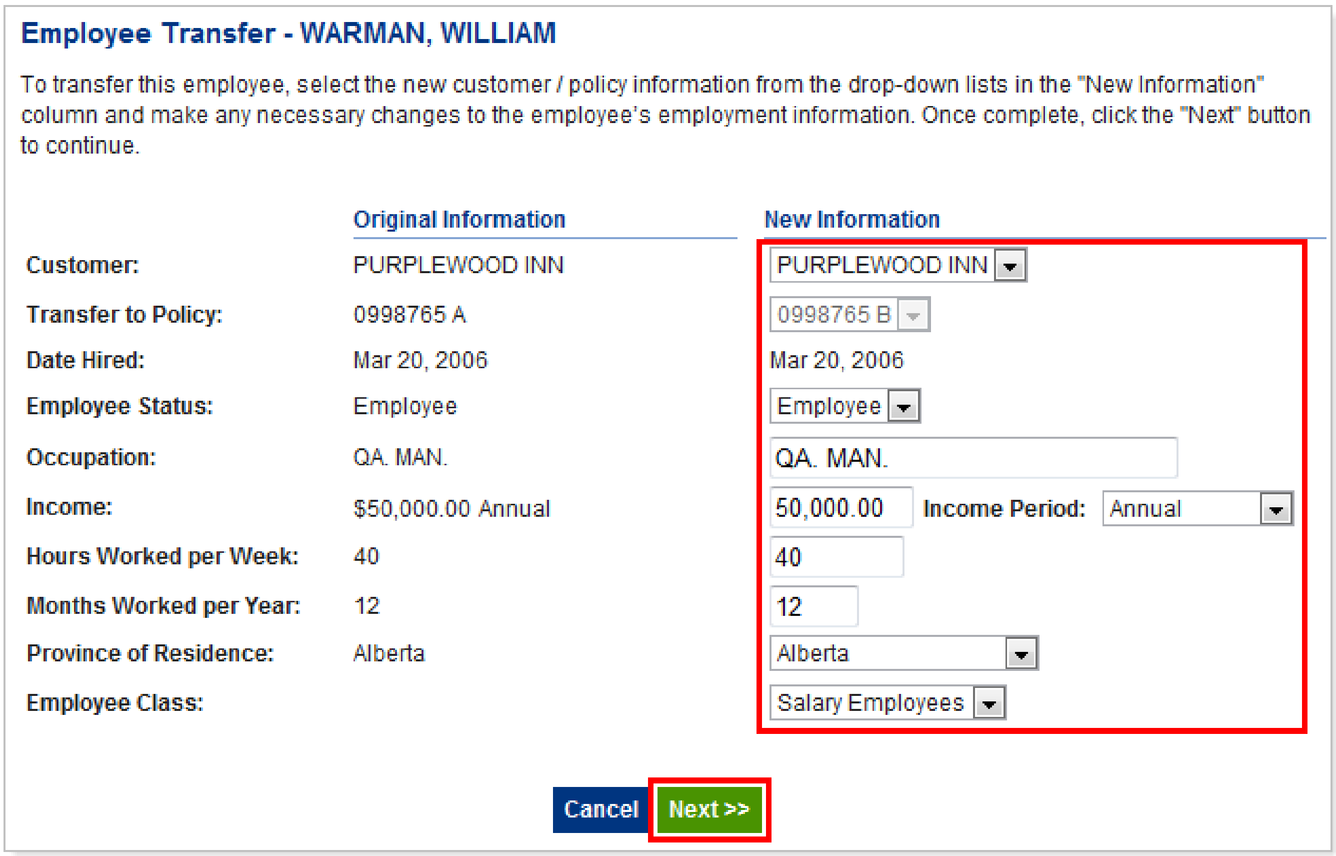
2. You will be taken to the **Employee Transfer** screen. The current salary information will be listed on the left.

   a. Select the **Customer** name and **Transfer to Policy** as required.

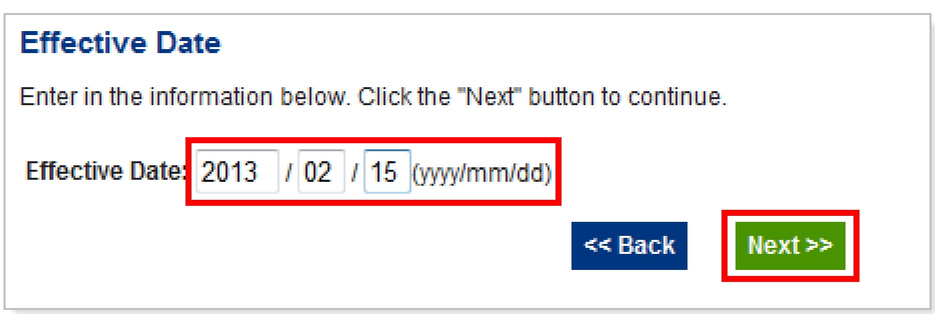
   b. You will need to select the **Employee Status** as the allowable options may change between policies.

   c. Update the other salary information as required.

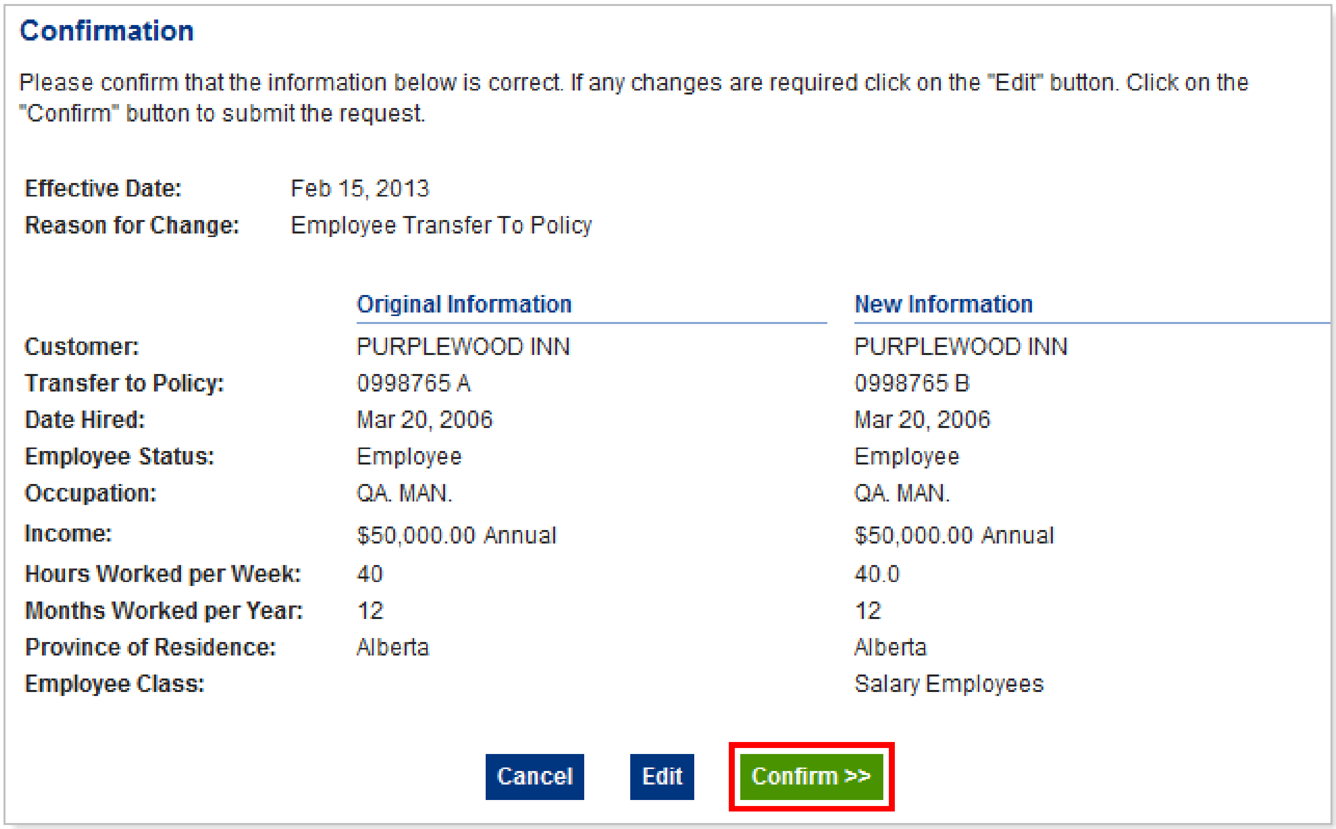
   d. Click on **Next>>**.




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.



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




- 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 <u>**Manage Employee Transfer Submitted**</u> 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.

| | |
|---|---|
| **Status:** | Completed |
| **Reason for Change:** | Manage Employee Transfer |
| **Effective Date:** | Feb 15, 2013 |

| | Information to be Updated |
|---|---|
| **Customer:** | PURPLEWOOD INN |
| **Transfer to Policy:** | 0998765 B |
| **Date Hired:** | Mar 20, 2006 |
| **Employee Status:** | Employee |
| **Occupation:** | QA. MAN. |
| **Income:** | $50,000.00 Annual |
| **Hours Worked per Week:** | 40 |
| **Months Worked per Year:** | 12 |
| **Province of Residence:** | Alberta |
| **Employee Class:** | 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 <u>Certificate of Insurance</u> for the new employee.
- Click on the **Summary of Coverage** link to view a <u>Summary of Coverage</u> 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 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

View Certificate of Insurance    View 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.)*

| 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 | $ . |
| **Total Premium** | | | | **$ .** |

**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.