

# Welcome to Benefits Manager

## Instruction Guide for Online Enrollment Management

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This instruction guide demonstrates how to navigate through Enrollment Management. Please make sure you are successfully logged into Benefits Manager before beginning this guide (Diagram 1).

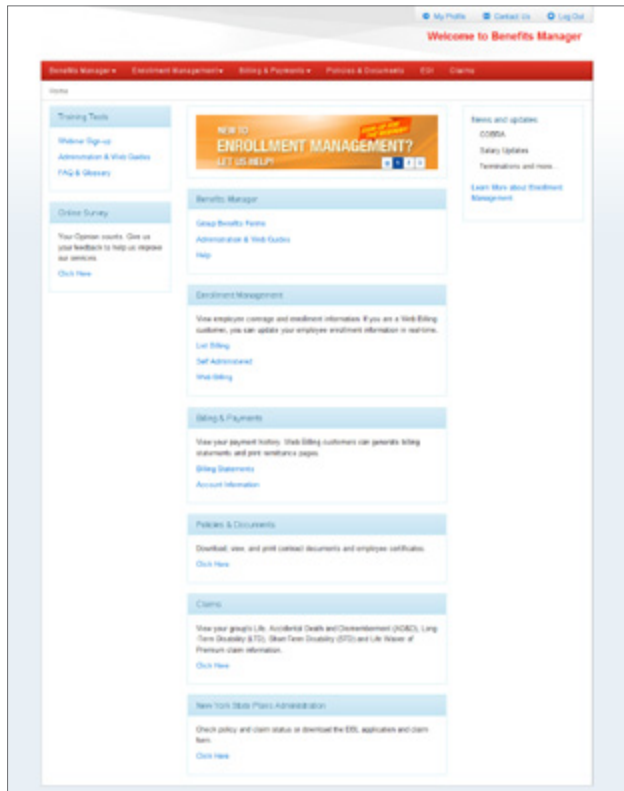


Diagram 1

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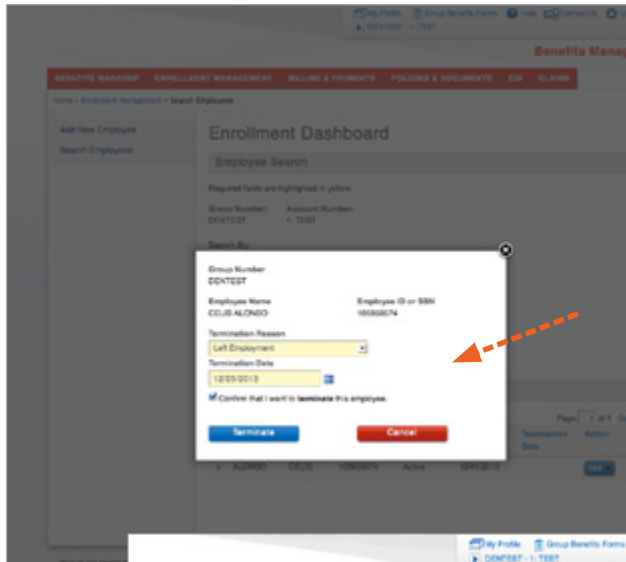


Diagram 2

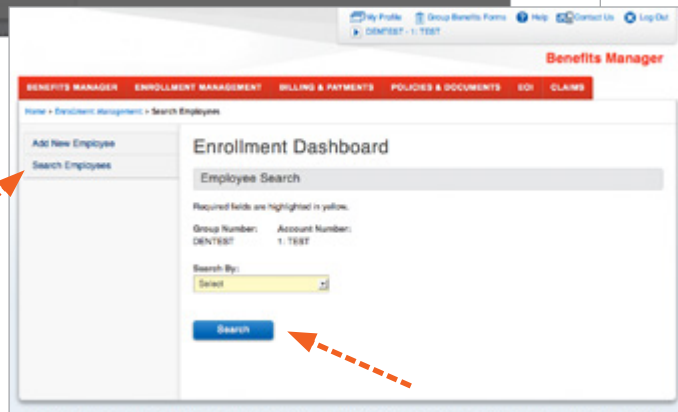


Diagram 3

## Section 1:

# Enrollment Management Overview

If you have access to multiple groups and/or accounts, you will be prompted to make your group and account selection upon first entering Enrollment Management. Information will automatically populate if you have access to one group and one account (Diagram 2). From the Enrollment Management page (Diagram 3) you may access the following transactions:

### 1. Add Employee

Click "Add Employee" to add an employee.

 **Tip:** Add Employee also covers adding Late Entrants and new employees during Annual Enrollment.

### 2. Change

Add New Employee or Search an existing employee to view or change their record (Diagram 3).

### 3. Search

View your Group's active and terminated insured lists and individual employee information.

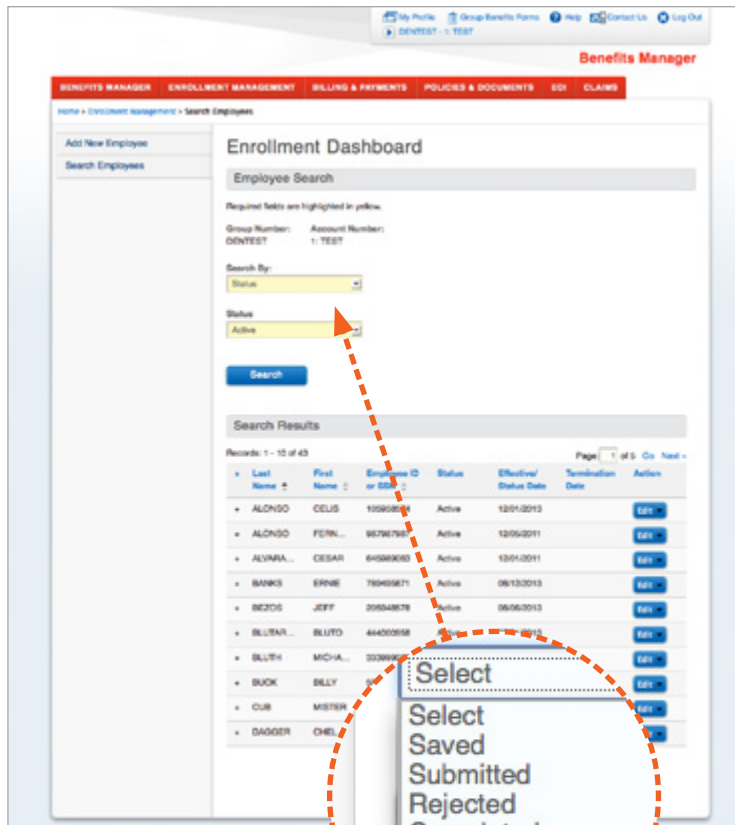


Diagram 4

## Section 2: Search

The Insured List and Recent Additions Search (Diagram 4) allows you to search by Name, Employee ID or SSN and Status.

The Status options are as follows:

- Save** – a saved incomplete record
- Submitted** – submission has not yet been processed by our system
- Rejected** – the system could not successfully process the record; call Customer Service for resolution
- Completed** – successfully processed
- Active** – employee with active benefits
- Terminated** – employee with terminated benefits

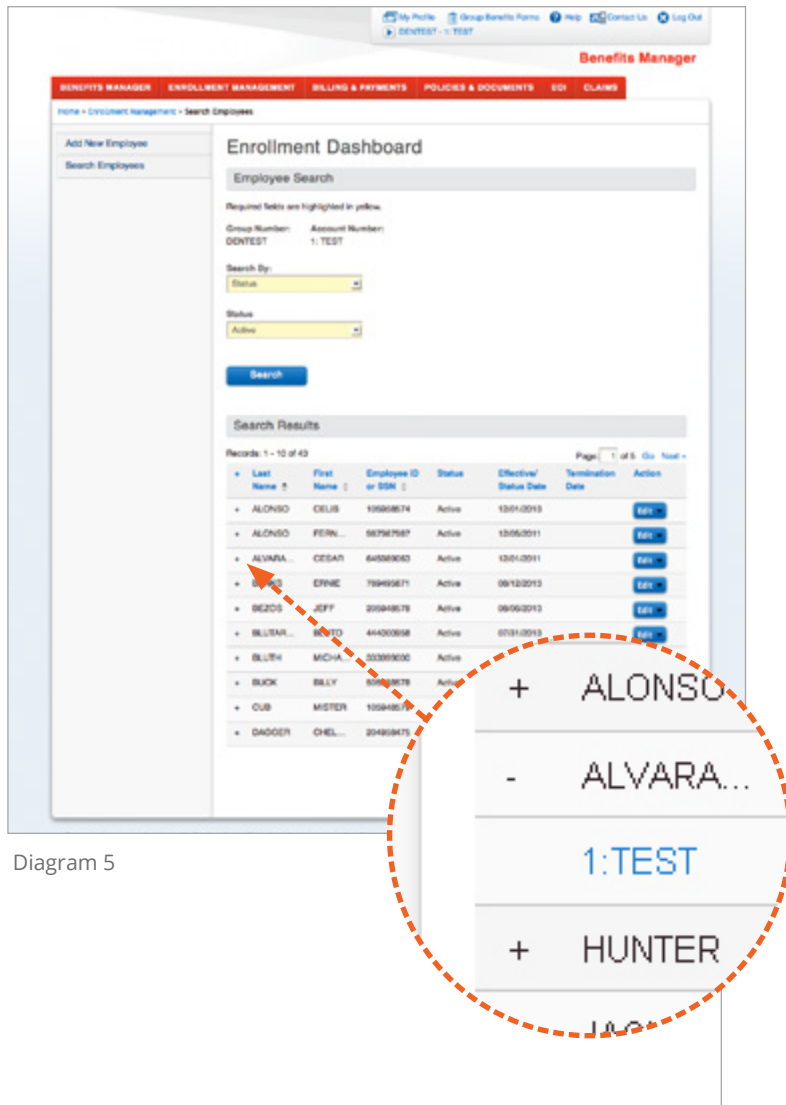


Diagram 5

The Search results appear on the bottom of the same page.

To view the employees current benefits information, click on the “+” sign at the left of the employee name and then the Group and Account number link (Diagram 5).

 **Tip:** To update an employee’s information click on the “Edit” button to the right.



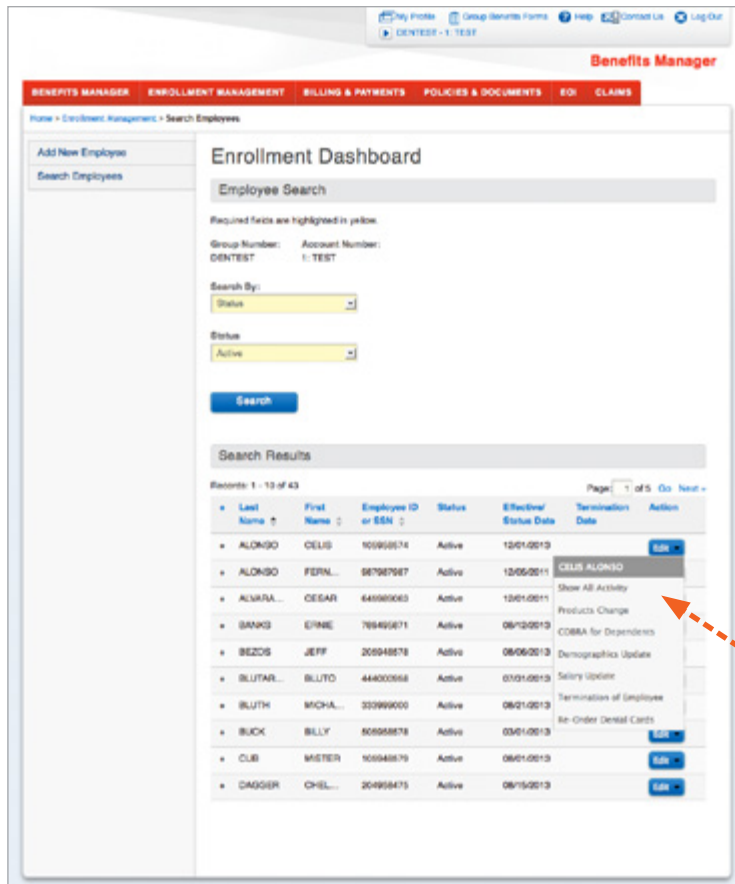
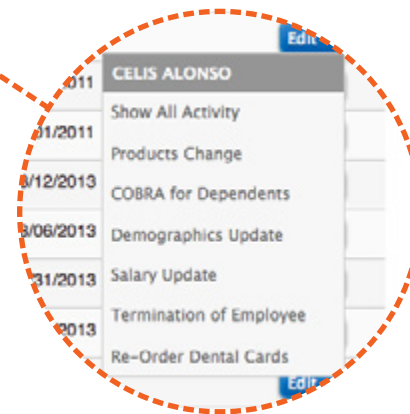


Diagram 6

## Section 3: Change

The following changes and requests can be submitted depending on the group's products (Diagram 6):

- Products Change
- COBRA for Dependents
- Demographic Update
- Salary Update
- Termination of Employee



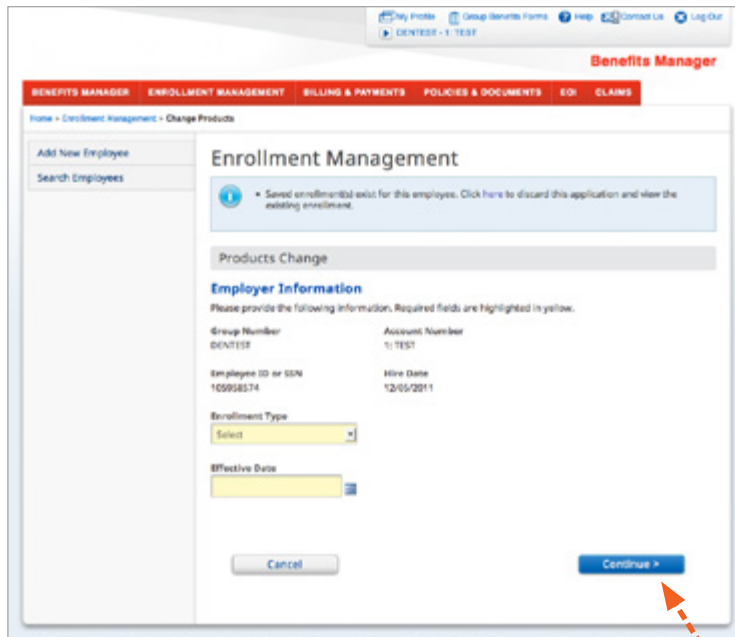


Diagram 7

## 1. Products Change

**Step 1:** Use Products Change (Diagram 7) to make any changes to an existing employee's coverage, including:

- Product additions / terminations
- Dependent additions / terminations
- Class changes and coverage option changes.

**Step 2:** Once you have completed your modification click Continue.

Group Number  
ABC GROUP

Employee Name  
JOHN SMITH

Employee ID or SSN  
1234567890

Salary  
45000

Salary Period  
Annually

Effective Date  
12/25/2013

Submit Cancel

Diagram 8

Group Number  
ABC GROUP

Employee Name  
JOHN SMITH

Employee ID or SSN  
1234567890

Termination Reason  
Left Employment

Termination Date  
12/25/2013

Confirm that I want to terminate this employee.

Terminate Cancel

Diagram 9

## 2. Salary Updates

**Step 1:** Make the desired edits to the Salary Update (Diagram 8).

Please note: Salary, Salary Period, and Effective Date are required.

**Step 2:** When edits are complete, click submit.

## 3. Terminations

**Step 1:** Make the edits to the Termination of Employee (Diagram 9).

 **Tip:** For Termination of Employees we simply require the reason and termination date.

**Step 2:** When edits are complete, click submit.



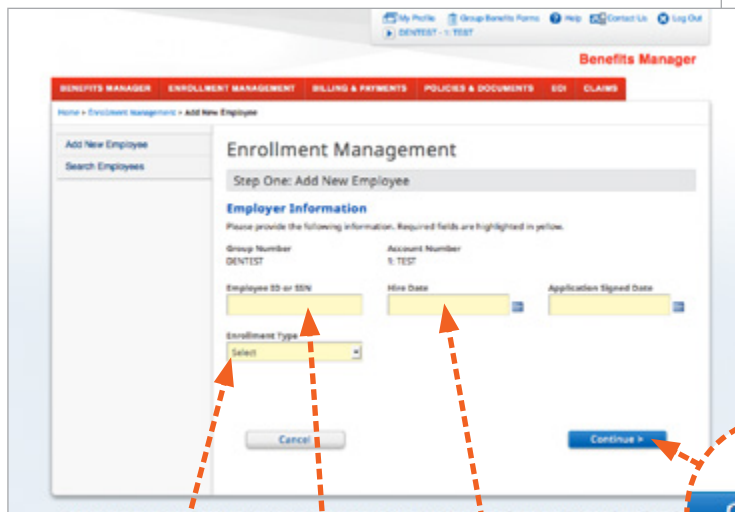


Diagram 10

## Section 4:

# Add Employee

- Step 1:** Enter your Employee's ID or SSN, Date of Hire and Application Signed Date.
- Step 2:** The Class field will then populate with the appropriate selections based on the dates entered.

**Please note:** you *MUST* enter the Employee ID or SSN, Hire Date, and Application Signed Date in order for Class to populate.

 **Tip:** Only choose a "Life Event" if that is the main reason for the addition.

If the Enrollment is taking place during the group's anniversary period, Anniversary will display as an option in Enrollment Type.

- Step 3:** Click Continue (Diagram 10).

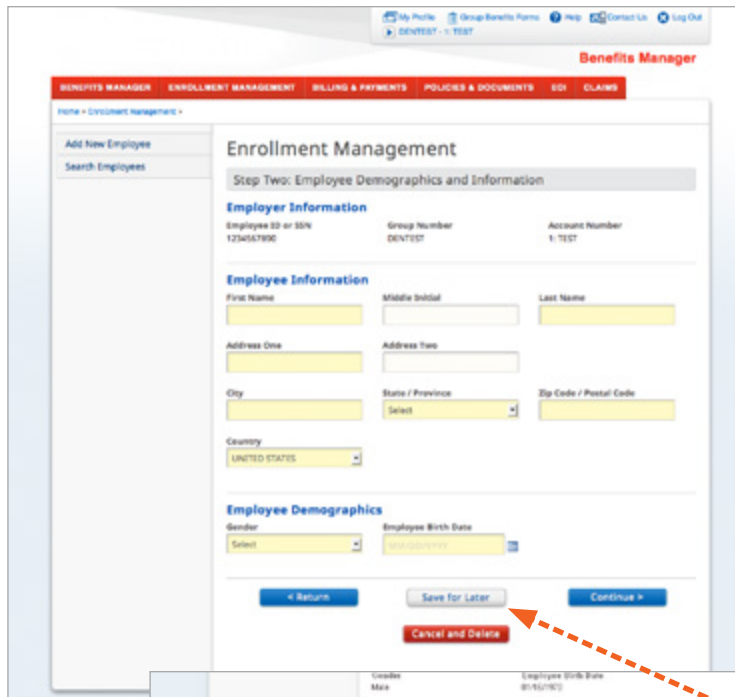


Diagram 11

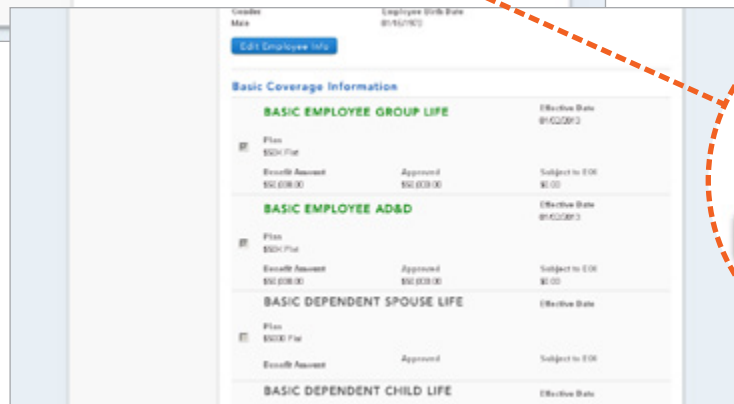


Diagram 12

**Step 4:** Enter the employee's name, address and demographics. These are all required fields (Diagram 11).

**Step 5:** Enter the appropriate coverage information. Based on the previous information entered, the fields will default to the benefits available for that employee (Diagram 12). Supporting coverage information will only be required if salary based or tobacco rated plans are elected.

**Tip:** If you choose to "Save for Later" you will be able to access the record in Search by choosing the Status "Saved."

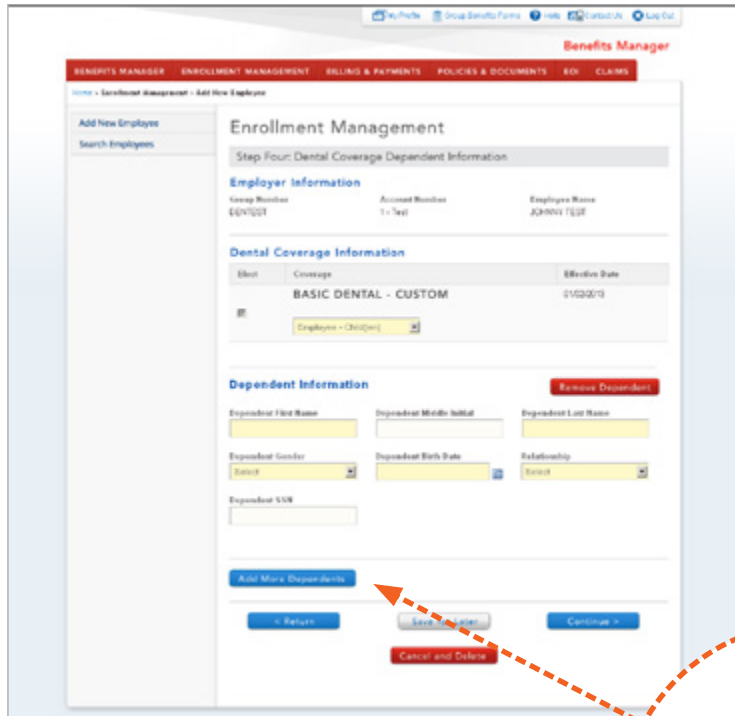



Diagram 7

## Step 6: Dental and Vision Coverage Dependent Information

If a coverage option for spouse and/or family dental is selected, you will be asked for Dependent information.

 **Tip:** You can continue to “Add More Dependents” as needed.

Add More Depe

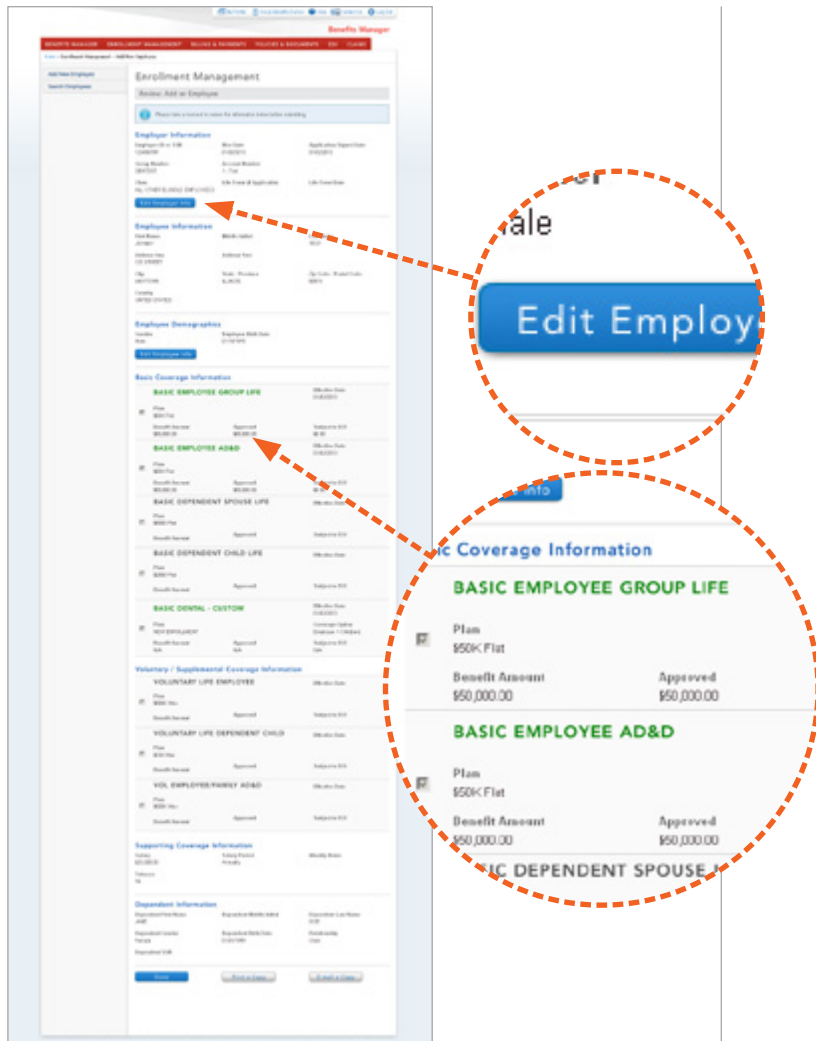


Diagram 13

## Review: Add an Employee

Upon review, Edit and Save for Later options will be available (Diagram 13).

 **Tip:** Selected products will appear in Green.

The system will indicate if the requested amount requires an EOI application.

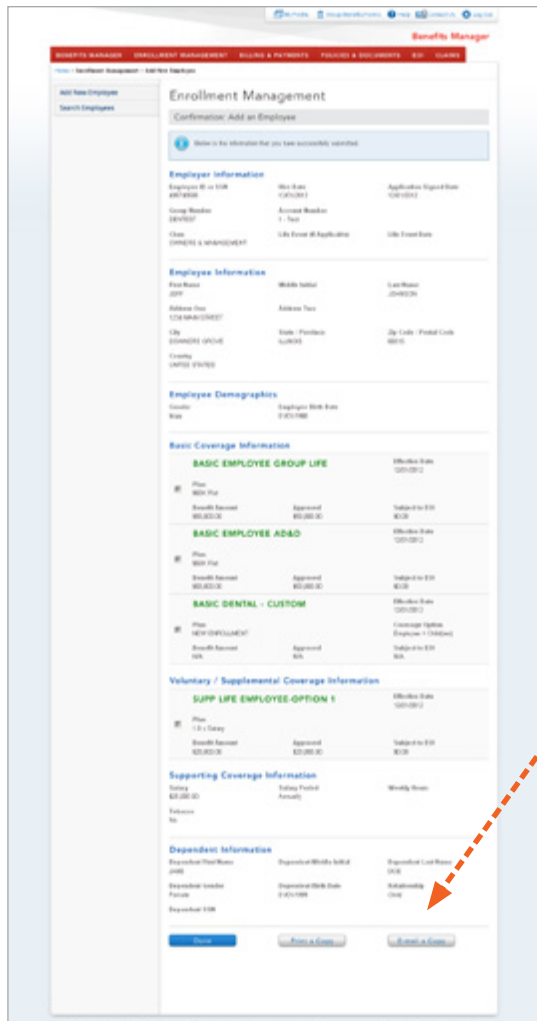


Diagram 14

## Confirmation: Add an Employee

Here you can Print or email a copy of the confirmation to an employee or yourself (Diagram 14).

Print a Copy

E-mail a Copy

## Evidence of Insurability (EOI)

If Evidence of Insurability (EOI) is required, the Confirmation page will present two options for notifying the employee to complete the necessary form.

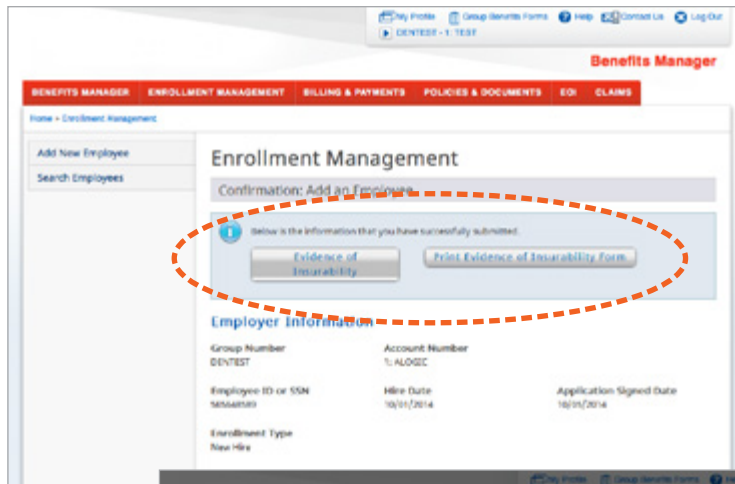


Diagram 15

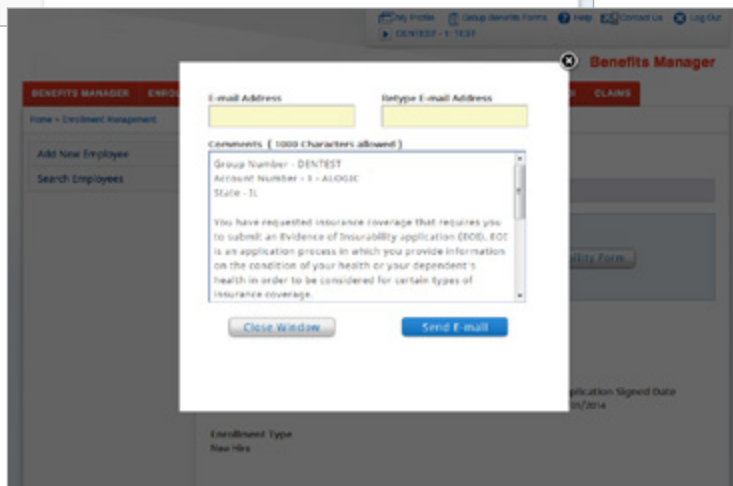


Diagram 16

## Evidence of Insurability (EOI) (continued)

Clicking on “Print Evidence of Insurability Form” will print a paper copy of the EOI form (Diagram 15). Clicking on “Evidence of Insurability” will launch a window in which you may enter and confirm the employee’s email address (Diagram 16). This will send an email to the employee containing a link to the online EOI form, as well as instructions for completing the application.

**This concludes the Enrollment Management Guide.**

Thank you for using Benefits Manager.