



# **Benefits Platform**

## User Guide

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# Employer Guide

## Logging In & Registering for the Platform

### Registering for the Platform

1. You will receive an email containing registration instructions with an Access Code

*This is an automated response. Please do not reply to this message.*

Our portal is one-stop employee benefits source with valuable resources that can help enhance your benefits program <https://ihris.trionfoconnect.com/Portals> and login to your account for access to these important items:

- Manage your employee benefits
- Manage life events and ongoing maintenance
- Overall benefits administration and management
- Access reports
- Your billing statement with payments and adjustments

Follow the instructions below to complete registration!

**Employer Name: (Group Name)**  
**Your Access Code is: 1234567890 |**

Register:

1. Visit the website <https://ihris.trionfoconnect.com/Portals>
2. Click on **Employer**
3. Click on **Register Now**
4. Click on User Type **Employer**
5. Enter **Access Code**
6. Click on **Submit**
7. Complete your **Account Information**
8. Click on **Submit**

If you have any questions, you may contact your Agent, **(Agent Name)**.

2. Select "Register Now" to create a user profile as an "Account"

### Online Benefit Management

Automated enrollment and self-administration eliminates the headache of open enrollment. This means members can enroll on their time and include their family in the decision-making process.

The diagram illustrates three login options: Employee (red icon), Account (teal icon), and Back Office (orange icon). Dashed lines connect these icons to a screenshot of the login/register interface. In the interface, the 'Account' tab is selected, and a red arrow points to the 'Register Now' link. Another red arrow points to the 'Register Now' link in the interface.

**Employee**  
Employee can login by clicking this Icon

**Account**  
Account can login by clicking this Icon

**Back Office**  
Back Office administrators can login by clicking this Icon

**Account**

Account Employee Back Office

Username  
USERNAME|

Password  
.....

Register Now  
Forgot Username | Forgot Password

Login

# Logging In & Accessing Group

1. At the login screen, select "Account" and login with user credentials

**Online Benefit Management**

Automated enrollment and self-administration eliminates the headache of open enrollment. This means members can enroll on their time and include their family in the decision-making process.

**Employee**  
Employee can login by clicking this icon

**Account**  
Account can login by clicking this icon

**Back Office**  
Back Office administrators can login by clicking this icon

**Account**

Account Employee Back Office

Username  
USERNAME|

Password  
.....

[Register Now](#)  
[Forgot Username](#) | [Forgot Password](#)

Login

# Dashboard Navigation

This provides a snapshot view of all enrollees within the current plan year or for those in a special enrollment window

1. Benefit Cost Analysis – This breaks down the monthly premium by benefit type (the different benefit types are clickable tiles) and shows a full cost breakdown by employee
  - a. You can filter for specific employees via the funnel filters (shown by the red arrow below)
2. Quick Actions – Main functions on the platform are found here
  - a. "Add Employee", "Maintenance", Account Administration (Changing passwords, security questions, etc.), etc.

## Account Dashboard

### ENROLLMENT STATUS ?

**190**  
Days Left to Enroll

**457**  
Eligible Employees

**0**  
Completed Enroll

**0**  
Enroll In Progress

**457**  
Not Started Enroll

### BENEFIT COST ANALYSIS ?

Open Enrollment

**\$0.00**  
Total Monthly Health Premium

**\$0.00**  
Total Monthly Critical Illness Insurance Premium

**\$0.00**  
Total Monthly Accident Insurance Premium

**\$0.00**  
Total Monthly Hospital Indemnity Premium

**\$0.00**  
Total Monthly Voluntary Life Premium

### Health Plans - Employee Election

Status	Employee Name	Plan Name	Coverage Tier	Plan Cost	ER Contribution	EE Contribution
	Abdul Lambarton					
	Abdul Lambarton					
	Adaline Weed					
	Adams Sizzey					
	Adiana Straughan					
	Adrien Denyagin					

#### Quick Actions

- Manage Employer Benefits
- Employee Listing
- Add Employee ←
- Qualifying Event Requests
- Maintenance ←
- Change Password
- Change Email Address
- Change Security Questions
- Contact Us

#### Agent Details

For questions or help call us

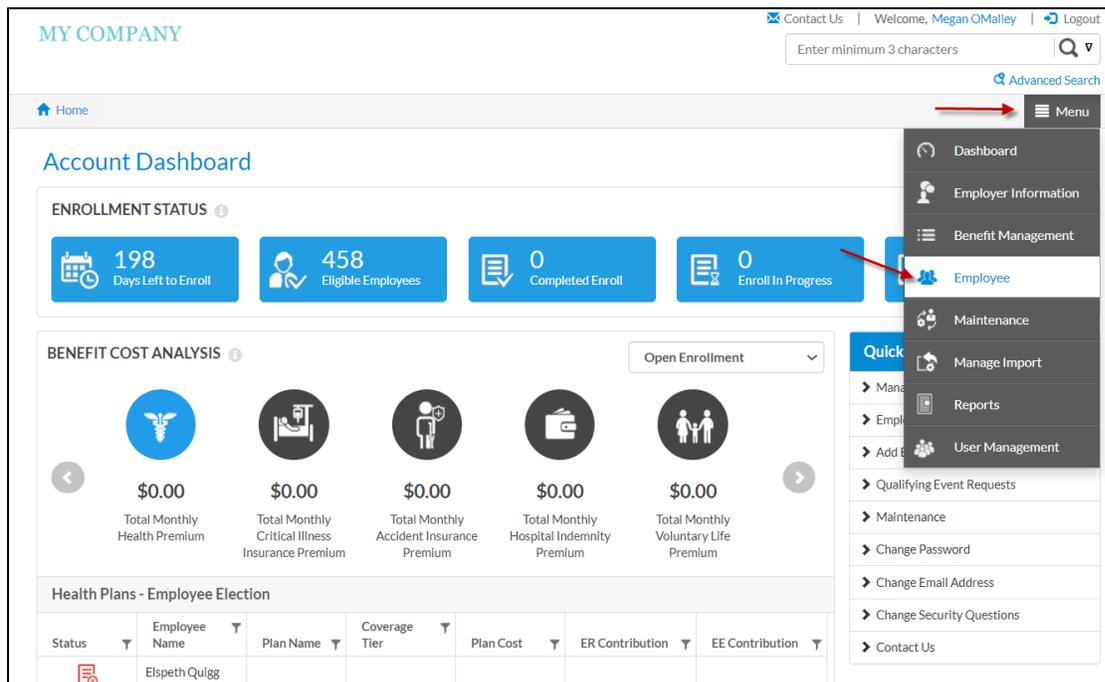
# Membership Maintenance

Maintenance is the main feature on the platform where all membership transactions take place. Any requests regarding membership – adding benefits, updating demographic details, terminations, etc. – MUST be completed here.

## Adding a New Employee

First, an employee’s demographics must be added to the system. Simply adding an employee’s demographics does NOT ensure enrollment of benefits.

1. Select the Menu and then select Employees



2. Click on "Add Employee"

MY COMPANY

Contact Us | Welcome, Megan O'Malley | Logout

Enter minimum 3 characters

Advanced Search

Home > Employee

Menu

### Employees Listing

Listing of all employees

Employer Name: Clear Cut LLC

Tax ID: 23-4189902

Access Code: F93E18859960

Employer Status: Active

Employees

Clear Filters Add Employee

Name	Alternate ID	Access Code	Date of Birth	SSN	Status
Abdul Lambarton	B08D162D09B	812DF86E0F40	11/11/1976	XXX-XX-4314	Employed
Adaline Weed	638D4D02BAC	E2DD3D25079A	08/12/1977	XXX-XX-1251	Employed
Adams Sizzey	78A78DDC241	53064EAA0D7D	08/06/1975	XXX-XX-9900	Employed
Adiana Straughan	31F3787E8A3	085C83FE0A84	01/12/1978	XXX-XX-4071	Employed
Adrien Denyagin	F433BDB6579	A9B54E490754	09/28/1977	XXX-XX-3669	Employed
Aguste Terrazzo	64A8CCB08F8	7F8637C30056	08/06/1976	XXX-XX-1355	Employed
Alli Schust	9A681E9A54E	B9037ECA039C	09/14/1976	XXX-XX-0682	Employed
Aimil Kingman	55533BDA89B	02DA40C00273	07/16/1978	XXX-XX-7836	Employed
Albina Behn	70D5BF0002F	736189F40639	07/07/1975	XXX-XX-5972	Employed
Alexa Gwinn	21C867FA7FD	FE1C67090D76	06/16/1998	XXX-XX-1186	Employed

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3. Fill out all required fields and **click** next. Required fields will be clearly marked with an asterisk \*. (see picture below)
- Leave the Effective Date as the defaulted present date when entering the employee. You will list the coverage/benefit effective dates at a later time.
  - Please note that the "annual salary" field is not required on the system but may be required if salary information pertains to your group's benefits – ex. Disability or Supplemental Life/AD&D

## Add Employee

This wizard will help you through the addition of an employee. You can also add a benefit for this employee or open up the enrollment to enable the employee make their own elections.

\* - Mandatory fields

1 PERSONAL DETAILS 2 DEPENDENT DETAILS 3 SUMMARY

Employer Name: Clear Cut LLC	Tax ID: 23-4189902	Access Code: F93E18859960	Employer Status: Active
---------------------------------	-----------------------	------------------------------	----------------------------

### Personal Details

Salutation:

First Name: \*  MI:  Last Name: \*

Suffix:  SSN: \*  SSN Last 4Digit:  Gender: \*

Date of Birth: \*  Marital Status: \*  Date of Hire: \*

Email Address:  Alternate ID:  Access Code:

Division: \*  Class: \*  Payroll Schedule: \*

Height:  ft  in Weight:  lbs Title:

Effective From: \*  Termination Date:  Status: \*

Annual Salary: \*  Default Role:   Use Tobacco?  Disabled

### Employee Address

Address Type: \*  Address Name: \*  Primary Address: \*

Address 1: \*  Address 2:  City: \*

State: \*  Country: \*  Zipcode: \*

County \*  Phone:  Ext:  Fax:

4. Dependents can be added on the next screen by clicking on "Add Dependent". Dependents can be also be added at a later date if their demographic information is not provided at the time of entering the employee to the system.

MY COMPANY | Contact Us | Welcome, Megan O'Malley | Logout

Enter minimum 3 characters | Advanced Search

Home > Employees Listing > Add Employee | Menu

### Add Employee

This wizard will help you through the addition of an employee. You can also add a benefit for this employee or open up the enrollment to enable the employee make their own elections.

\* - Mandatory fields

1 PERSONAL DETAILS > 2 DEPENDENT DETAILS > 3 SUMMARY >

Dependents

[Add Dependent](#)

Relationship	First Name	Last Name	Gender	Date of Birth	SSN	Status
No Records Found!						

[Previous](#) [Next](#)

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Enter minimum 3 characters | Advanced Search

Home > Employees Listing > Add Employee | Menu

Dependent added successfully

### Add Employee

This wizard will help you through the addition of an employee. You can also add a benefit for this employee or open up the enrollment to enable the employee make their own elections.

\* - Mandatory fields

1 PERSONAL DETAILS > 2 DEPENDENT DETAILS > 3 SUMMARY >

Dependents

[Add Dependent](#)

Relationship	First Name	Last Name	Gender	Date of Birth	SSN	Status
Spouse	Jane	Doe	Female	01/01/1990	XXX-XX-2222	Active

No of Records : 1

[Previous](#) [Next](#)

- a. Enter Dependent Information, **click** "Save" & "Next"

5. Verify demographic details are correct

MY COMPANY

[Contact Us](#) | 
 [Welcome, Megan O'Malley](#) | 
 [Logout](#)

Advanced Search

Home > Employees Listing > Add Employee
Menu

### Add Employee

This wizard will help you through the addition of an employee. You can also add a benefit for this employee or open up the enrollment to enable the employee make their own elections.

\* - Mandatory fields

1 PERSONAL DETAILS
2 DEPENDENT DETAILS
3 SUMMARY

Employer Name: Clear Cut LLC	Tax ID: 23-4189902	Access Code: F93E18859960	Employer Status: Active
---------------------------------	-----------------------	------------------------------	----------------------------

#### Personal Details

Salutation:

First Name: John	MI:	Last Name: Doe
Suffix:	SSN: <span style="color: yellow;">⚠</span> XXX-XX-1111	SSN Last 4 Digit: 1111
Gender: Male	Date of Birth: 01/01/1990	Marital Status: None
Date of Hire: 01/01/2020	Email Address: JohnDoe@Test.com	Alternate ID: E8A92D1E3DA8
Access Code: 24FD8795C578	Division: Main Division	Class: FullTime
Payroll Schedule: 2020-BI_Weekly	Height:	Weight:
Title:	Effective From: 06/16/2020	Termination Date:
Status: Employed	Annual Salary: \$75,000.00	Default role: EE-System

#### Employee Address

Address Type: Home	Address Name: Home	Primary Address: Yes
Address 1: 8700 W Bryn Mawr Ave	Address 2:	City: Chicago
State: IL	Country: USA	Zipcode: 60631
County: Cook	Phone:	Ext:
Fax:		

Dependents						
Relationship	First Name	Last Name	Gender	Date of Birth	SSN	Status
Spouse	Jane	Doe	Female	01/01/1990	XXX-XX-2222	Active

No of Records : 1

How would you like to proceed next?

Open an enrollment window for benefits  
 Add a benefit to the employee  
 None

← Previous
Next →

6. Select "none" under 'How would you like to proceed next?' – **Do not select any other options**

Dependents						
Relationship	First Name	Last Name	Gender	Date of Birth	SSN	Status
Spouse	Jane	Doe	Female	01/01/1990	XXX-XX-2222	Active

No of Records : 1

How would you like to proceed next?

Open an enrollment window for benefits

Add a benefit to the employee

None

[← Previous](#) [Finish →](#)

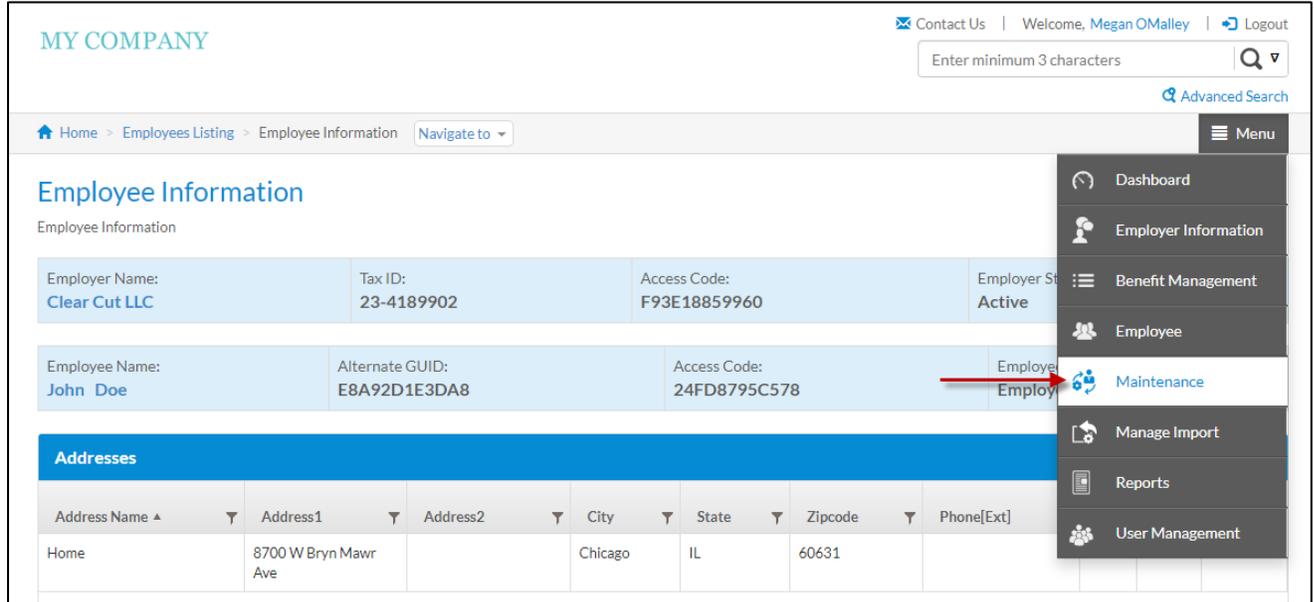
7. **Click** finish

\*The employee has been entered into the system. For all membership needs, transactions should be completed via "**Maintenance**".

## Adding a Benefit to an Existing Employee

Benefit listing will show all applicable benefits per Employer/Account and the premium by selected employee. The cost breakdown will show annual, monthly, and per pay period options – the per pay period is subject to the details laid out by the agent during the group setup

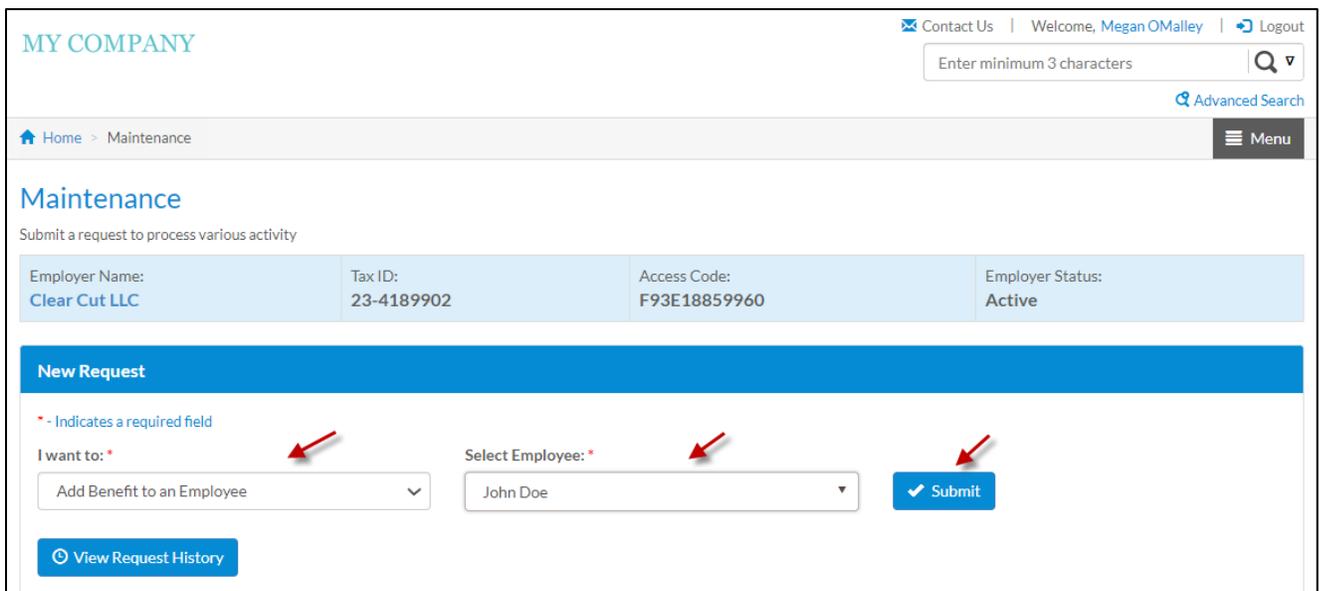
1. Select the menu icon and **click** on “Maintenance”



The screenshot shows the 'Employee Information' page for 'Clear Cut LLC'. The page displays employee details for 'John Doe' and a table of addresses. A 'Menu' icon in the top right corner is open, showing a list of navigation options. A red arrow points to the 'Maintenance' option in the menu.

Address Name	Address1	Address2	City	State	Zipcode	Phone[Ext]
Home	8700 W Bryn Mawr Ave		Chicago	IL	60631	

2. Select “Add Benefit to an Employee” under “I want to”
  - a. Select Employee by typing in the name which will auto populate some options to pick from
  - b. Select “Submit”



The screenshot shows the 'Maintenance' page. The 'New Request' section has three dropdown menus: 'I want to:', 'Select Employee:', and 'Submit'. The 'I want to:' dropdown is set to 'Add Benefit to an Employee', and the 'Select Employee:' dropdown is set to 'John Doe'. A red arrow points to the 'Submit' button.

3. Enter parameters for the transaction – Effective Date, Qualifying Event Date, & Reason

### Maintenance

Submit a request to process various activity

Employer Name: Clear Cut LLC	Tax ID: 23-4189902	Access Code: F93E18859960	Employer Status: Active
---------------------------------	-----------------------	------------------------------	----------------------------

#### New Request

\* - Indicates a required field

I want to: \*      Select Employee: \*

Add Benefit to an Employee      John Doe     

#### Add Benefit to Employee

\* - Indicates a required field

Benefit Effective Date \*      Event Date \*      Reason \*

01/01/2020      12/01/2019      Others

Comments \*      New Hire

#### Benefits

4. Select "Show" under "Benefits"

**New Request**

\* - Indicates a required field

I want to:  Select Employee:

---

**Add Benefit to Employee**

\* - Indicates a required field

Benefit Effective Date:  Event Date:  Reason:

Comments:

---

**Benefits** Hide

How would you like your costs to be represented?  Annual  Monthly  Pay Per Period Show all Hide all

**Group - Health** Hide



**Choice Silver PPO 024-00**  
Effective Date: 01/01/2020 - 12/31/2020

Deductible : \$3000  
Plan Type : PPO  
Doctors Office Visits : \$40

**Who is Covered?**

Covered	Name	Relationship	Date of Birth	Age
<input checked="" type="checkbox"/>	Jane Doe	Spouse	01/01/1990	28



**BlueCross BlueShield of Texas**

\$399.49/month

[Cost Break Down](#)

Tax Type: Pre Tax
[Waive Coverage](#) | [View Plan Details](#)

- Any respective benefit summaries available for the group will be made available to download/viewing real time under each benefit as an attachment.
- Basic Plan information will be listed whenever available/applicable
- Premium listed on the window is the EE cost – select "Cost Break Down" to view any employer contributions and the total monthly premium cost

- Apply/Waive benefits as requested by the employee. Any benefits that are not selected or actively waived will simply not appear under the employee's benefit listing

**Benefits** Hide

How would you like your costs to be represented? [Annual](#) | [Monthly](#) | [Pay Per Period](#) Show all Hide all

**Group - Health** Hide

**Choice Silver PPO 024-00**  
Effective Date: 01/01/2020 - 12/31/2020

Deductible : \$3000  
Plan Type : PPO  
Doctors Office Visits : \$40

**Who is Covered?**

Covered	Name	Relationship	Date of Birth	Age
<input checked="" type="checkbox"/>	Jane Doe	Spouse	01/01/1990	28

**BlueCross BlueShield of Texas**

**\$399.49/month**  
Cost Break Down

Selected

Tax Type: Pre Tax Waive Coverage | View Plan Details

---

**TX Blue HDHP**  
Effective Date: 01/01/2020 - 12/31/2020

Deductible : \$1250  
Plan Type : HDHP  
Doctors Office Visits : \$30

**Who is Covered?**

Covered	Name	Relationship	Date of Birth	Age
<input checked="" type="checkbox"/>	Jane Doe	Spouse	01/01/1990	28

**BlueCross BlueShield of Texas**

**\$440.79/month**  
Cost Break Down

Apply

Relationship	First Name	Last Name	Date of Birth	Amount
Self				\$30,000

Tax Type: Pre Tax

**Group - Accident Insurance** Show

**Group - Hospital Indemnity** Show

**Group - Voluntary Life** Show

**Group - Dental** Hide

**Dental PPO DTXHM09**  
Effective Date: 01/01/2020 - 12/31/2020

**Who is Covered?**  
No dependents found!

**\$23.89/month**  
Cost Break Down

Apply

Waive Coverage | View Plan Details

**Waiver Reason**

Reason \*

- Select
- Covered by individual policy
- Covered by Medicare
- Covered by spouse's/domestic partner's group coverage
- Enrolled in another Insurance Carrier Plan
- Other

**Group - Dental** Hide

**Dental PPO DTXHM09**  
Effective Date: 01/01/2020 - 12/31/2020

**Who is Covered?**  
No dependents found!

**MetLife**

**\$0.00/month**

**You have waived this coverage**

Reason: Covered by spouse's/domestic partner's group coverage

Tax Type: Pre Tax Remove Waive | Change Waive Reason | View Plan Details

6. Select "Submit"

**Maintenance**  
Submit a request to process various activity

Employer Name: Clear Cut LLC	Tax ID: 23-4189902	Access Code: F93E18859960	Employer Status: Active
---------------------------------	-----------------------	------------------------------	----------------------------

**New Request**

\* - Indicates a required field

I want to: \*  
Add Benefit to an Employee

Select Employee: \*  
John Doe

Submit

View Request History

**Add Benefit to Employee**

\* - Indicates a required field

Benefit Effective Date \*  
01/01/2020

Event Date \*  
12/01/2019

Reason \*  
Others

Comments \*  
New Hire

Benefits Show

Cancel Submit Request

Allow a few minutes for the submission to sync, and you will be able to view the benefits in the employee's record and/or the Dashboard

## Terminating an Employee

\*This function will terminate an employee's status **and** their respective benefits. Once an employee's status is marked as "terminated" you will no longer be able to perform Maintenance requests on your own.

1. Select the menu icon and **click** on "Maintenance"

The screenshot shows the 'Employee Information' page for 'Clear Cut LLC'. The page includes fields for Employer Name, Tax ID, Access Code, and Employee Name. A dropdown menu is open on the right side, with 'Maintenance' highlighted. The menu items are: Dashboard, Employer Information, Benefit Management, Employee, Maintenance, Manage Import, Reports, and User Management. The 'Employee Name' field is populated with 'John Doe'.

Address Name	Address1	Address2	City	State	Zipcode	Phone[Ext]
Home	8700 W Bryn Mawr Ave		Chicago	IL	60631	

2. Select "Term Employee" under "I want to"
  - a. Select Employee by typing in the name which will auto populate some options to pick from
  - b. Select "Submit"

The screenshot shows the 'Maintenance' page with the 'New Request' form. The form includes fields for Employer Name, Tax ID, Access Code, and Employer Status. The 'I want to:' dropdown is set to 'Term Employee', and the 'Select Employee:' dropdown is set to 'John Doe'. The 'Submit' button is highlighted with a red arrow. A 'View Request History' button is also visible.

\* - Indicates a required field

I want to: \*

3. Enter parameters – Qualifying Event Date, Term Date, & Reason
  - a. The “Term Date” will be the LAST day the member should have active coverage

**Term An Employee**

\* - Indicates a required field

Employee Name: *	Date of Birth: *	SSN: *	SSN Last 4Digit: *
<input type="text" value="John Doe"/>	<input type="text" value="01/01/1990"/>	<input type="text" value="XXX-XX-1111"/>	<input type="text" value="1111"/>
Gender: *	Date of Hire: *		
<input type="text" value="Male"/>	<input type="text" value="01/01/2020"/>		

Event Date: *	Term Date: *	Reason: *
<input type="text" value="06/16/2020"/>	<input type="text" value="06/30/2020"/>	<input type="text" value="Others"/>

Comments: \*

4. All respective benefits will be pre-selected and the effective till date will auto-fill

**Term An Employee**

\* - Indicates a required field

Employee Name: *	Date of Birth: *	SSN: *	SSN Last 4Digit: *
<input type="text" value="John Doe"/>	<input type="text" value="01/01/1990"/>	<input type="text" value="XXX-XX-1111"/>	<input type="text" value="1111"/>
Gender: *	Date of Hire: *		
<input type="text" value="Male"/>	<input type="text" value="01/01/2020"/>		

Event Date: *	Term Date: *	Reason: *
<input type="text" value="06/16/2020"/>	<input type="text" value="06/30/2020"/>	<input type="text" value="Others"/>

Comments: \*

**Benefits**

	Segment	Benefit Type	Benefit Name	Effective From	Effective Till
<input checked="" type="checkbox"/>	Group	Critical Illness Insurance	Critical Illness Insurance	<input type="text" value="01/01/2020"/>	<input type="text" value="06/30/2020"/>
<input checked="" type="checkbox"/>	Group	Life	Term Life- EM- Life 1-B w/ AD&D	<input type="text" value="01/01/2020"/>	<input type="text" value="06/30/2020"/>

No of Records : 2

5. **Click** on submit request & confirm action

**Term An Employee**

\* - Indicates a required field

Employee Name: \*  Date of Birth: \*  SSN: \*  SSN Last 4Digit: \*

Gender: \*  Date of Hire: \*

Event Date: \*  Term Date: \*  Reason: \*

Comments: \*

Benefits					
<input checked="" type="checkbox"/>	Segment	Benefit Type	Benefit Name	Effective From	Effective Till
<input checked="" type="checkbox"/>	Group	Critical Illness Insurance	Critical Illness Insurance	<input type="text" value="01/01/2020"/>	<input type="text" value="06/30/2020"/>
<input checked="" type="checkbox"/>	Group	Life	Term Life- EM- Life 1-B w/ AD&D	<input type="text" value="01/01/2020"/>	<input type="text" value="06/30/2020"/>

No of Records : 2

**Term An Employee**

\* - Indicates a required field

Employee Name: \*  SSN Last 4Digit: \*

Gender: \*

**Confirm**

Termination of Employee will remove all the active benefits and corresponding covered dependents. Make Reinitiate Employee Request to activate the Employee again. Are you sure to Term the Employee?

Home > Maintenance Menu

Request is successfully queued for processing.

**Maintenance**

Submit a request to process various activity

Employer Name: Clear Cut LLC	Tax ID: 23-4189902	Access Code: F93E18859960	Employer Status: Active
---------------------------------	-----------------------	------------------------------	----------------------------

**New Request**

\* - Indicates a required field

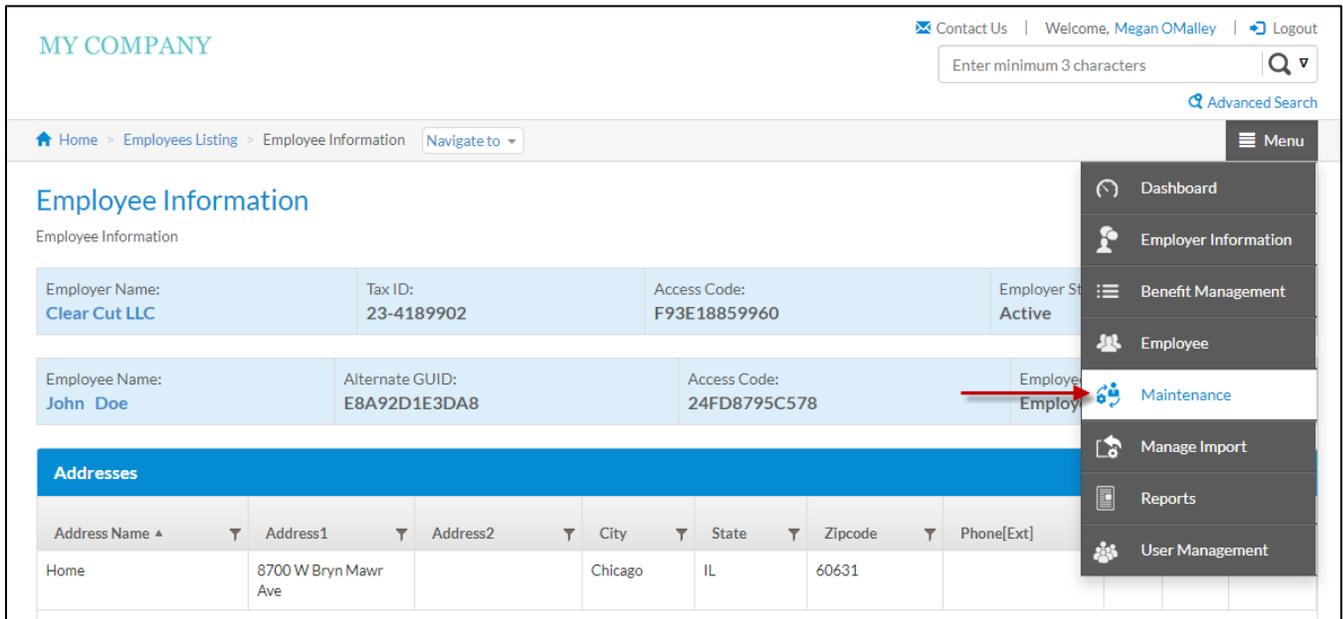
I want to: \*  Select Employee: \*

Allow a few minutes for the submission to sync and you will be able to view the benefits in the employee's record and/or the Dashboard

# Termining Employee Benefit

\*This function will only term an employee's benefits. Their status will remain as "employed"

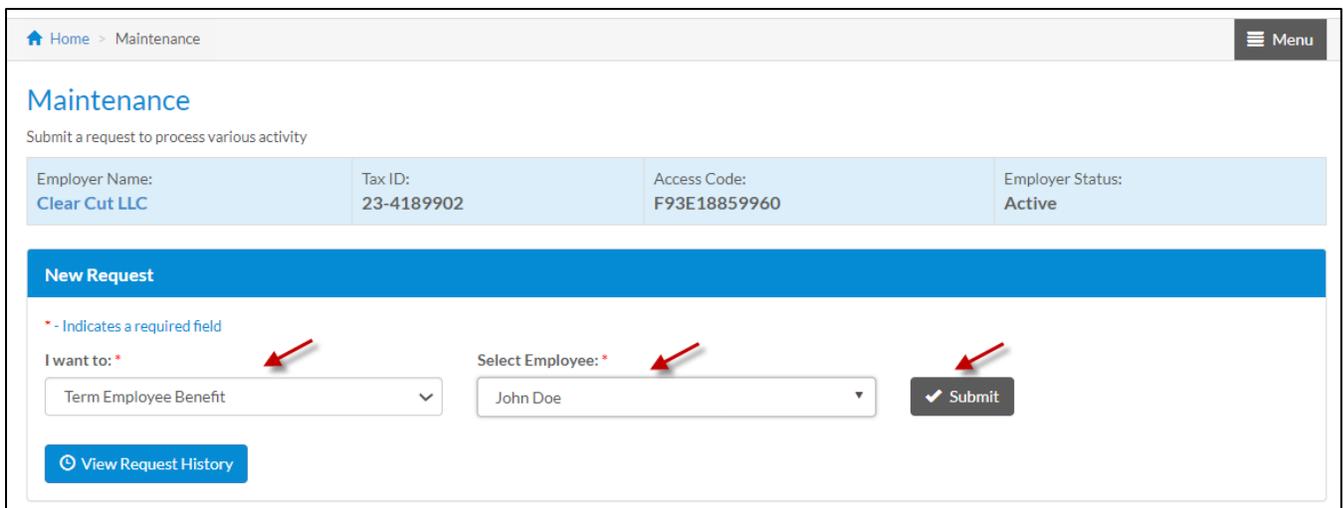
1. Select the menu icon and **click** on "Maintenance"



The screenshot shows the 'Employee Information' page for 'Clear Cut LLC'. The page includes fields for Employer Name, Tax ID, Access Code, and Employee Name. A 'Maintenance' menu item is highlighted in the dropdown menu, indicated by a red arrow.

Address Name	Address1	Address2	City	State	Zipcode	Phone[Ext]
Home	8700 W Bryn Mawr Ave		Chicago	IL	60631	

2. Select "Term Employee Benefit" under "I want to"
  - a. Select Employee by typing in the name which will auto populate some options to pick from
  - b. Select "Submit"



The screenshot shows the 'Maintenance' page with the 'New Request' form. The 'I want to:' dropdown is set to 'Term Employee Benefit' and the 'Select Employee:' dropdown is set to 'John Doe'. A red arrow points to the 'Submit' button.

**New Request**

\* - Indicates a required field

I want to: \*

Select Employee: \*

3. Enter parameters – Qualifying Event Date, Term Date, & Reason
  - a. The “Term Date” will be the LAST day the member should have active coverage

Home > Maintenance Menu

## Maintenance

Submit a request to process various activity

Employer Name: Clear Cut LLC	Tax ID: 23-4189902	Access Code: F93E18859960	Employer Status: Active
---------------------------------	-----------------------	------------------------------	----------------------------

**New Request**

\* - Indicates a required field

I want to: \* Select Employee: \*

Term Employee Benefit John Doe Submit

[View Request History](#)

4. Select benefits to terminate and the effective till date will auto-fill

**New Request**

\* - Indicates a required field

I want to: \* Select Employee: \*

Term Employee Benefit John Doe Submit

[View Request History](#)

**Term Employee Benefits**

\* - Indicates a required field

Event Date\* Term Date\* Reason\*

06/16/2020 06/30/2020 Marriage

**Benefits**

<input type="checkbox"/>	Segment	Benefit Type	Benefit Name	Effective From	Effective Till
<input checked="" type="checkbox"/>	Group	Critical Illness Insurance	Critical Illness Insurance	01/01/2020	06/30/2020
<input type="checkbox"/>	Group	Life	Term Life- EM- Life 1-B w/ AD&D	01/01/2020	06/30/2020

No of Records : 2

[Cancel](#) [Save](#)

5. **Click** on submit request

The screenshot shows a web application interface. At the top, there is a breadcrumb navigation: Home > Maintenance. A green notification banner at the top states "Request is successfully queued for processing." Below this, the page title is "Maintenance" with the subtitle "Submit a request to process various activity". A table displays employer information: Employer Name: Clear Cut LLC, Tax ID: 23-4189902, Access Code: F93E18859960, and Employer Status: Active. A blue header for "New Request" is followed by a legend: "\* - Indicates a required field". The form contains two dropdown menus: "I want to:" with the selected option "Term Employee Benefit", and "Select Employee:" with the selected option "John Doe". A blue "Submit" button with a checkmark is to the right of the second dropdown. Below the form is a blue button labeled "View Request History".

Allow a few minutes for the submission to sync and you will be able to view the benefits in the employee's record and/or the Dashboard

## Updating Employee Demographic Details

This action is used when updating names, salaries, addresses, etc.

1. Select the menu icon and **click** on "Maintenance"

The screenshot shows the 'Employee Information' page for 'Clear Cut LLC'. The page displays employee details for 'John Doe' and a table of addresses. A 'Menu' icon in the top right corner is open, showing a list of navigation options. The 'Maintenance' option is highlighted with a red arrow.

Address Name	Address1	Address2	City	State	Zipcode	Phone[Ext]
Home	8700 W Bryn Mawr Ave		Chicago	IL	60631	

2. Select "Update Employee Demographic Details" under "I want to"
  - a. Select Employee by typing in the name which will auto populate some options to pick from
  - b. Select "Submit"

The screenshot shows the 'Maintenance' page with the 'New Request' form. The form has three dropdown menus: 'I want to:', 'Select Employee:', and 'Submit'. Red arrows point to each of these fields. The 'I want to:' dropdown is set to 'Update Employee Demographic Details', and the 'Select Employee:' dropdown is set to 'John Doe'.

3. "Update Personal Details" - Expand sub-sections titled "Personal Information" & "Manage Address"
  - a. Select "show" to expand these sections

**Maintenance**  
Submit a request to process various activity

Employer Name: Clear Cut LLC    Tax ID: 23-4189902    Access Code: F93E1B859960    Employer Status: Active

**New Request**

I want to: \* Update Employee Demographic Details    Select Employee: \* John Doe   

**Update Personal Details**

Personal Information

Manage Address

4. Update demographic details as necessary (annual salary, address, last name, etc.)

I want to: \* Update Employee Demographic Details    Select Employee: \* John Doe   

**Update Personal Details**

**Personal Information**

\* - Indicates a required field

Salutation:

First Name: \* John    MI:     Last Name: \* Smith

Suffix:     SSN: \* XXX-XX-1111    SSN Last 4 Digit: 1111    Gender: \* Male

Date of Birth: \* 01/01/1990    Marital Status: \* None    Date of Hire: \* 01/01/2020

Email Address: JohnDoe@test.com    Alternate ID: \* E8A92D1E3DA8    Access Code: \* 24FD8795C578

Height: 0 ft 0 in    Weight: 0 lbs    Title:

Division: \* Main Division    Class: \* FullTime    Payroll Schedule: \* 2020-Bi\_Weekly

Effective From: \* 06/16/2020    Termination Date: \* mm/dd/yyyy    Status: \* Employed

Annual Salary: \* \$90,000.00    Default Role: EE-System     Use Tobacco?     Disabled

**Manage Address**

**Addresses**

Address Name	Address 1	Address 2	City	State	Zipcode	Phone[Ext]	Fax	Type	Primary
Home	8700 W Bryn Mawr Ave		Chicago	IL	60631			Home	Yes

No of Records: 1

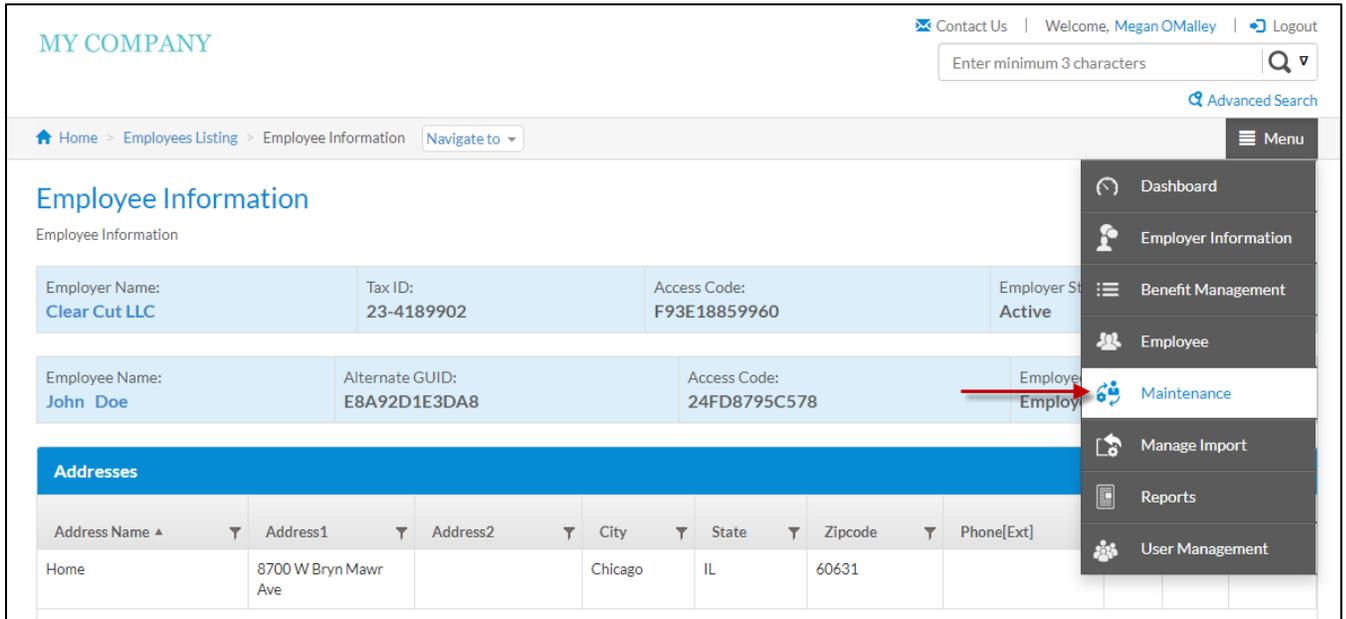
5. **Click** on Submit Request

The screenshot shows a web application interface for 'Maintenance'. At the top, there is a breadcrumb trail 'Home > Maintenance' and a 'Menu' button. A green notification box at the top states 'Request is successfully queued for processing.' Below this, the page title is 'Maintenance' with the subtitle 'Submit a request to process various activity'. A table displays employer information: Employer Name: Clear Cut LLC, Tax ID: 23-4189902, Access Code: F93E18859960, and Employer Status: Active. A blue header for 'New Request' is followed by a legend '\* - Indicates a required field'. The form includes two dropdown menus: 'I want to:' with 'Update Employee Demographic Details' selected, and 'Select Employee:' with 'John Doe' selected. A blue 'Submit' button with a checkmark is to the right. A 'View Request History' button is located at the bottom left of the form area.

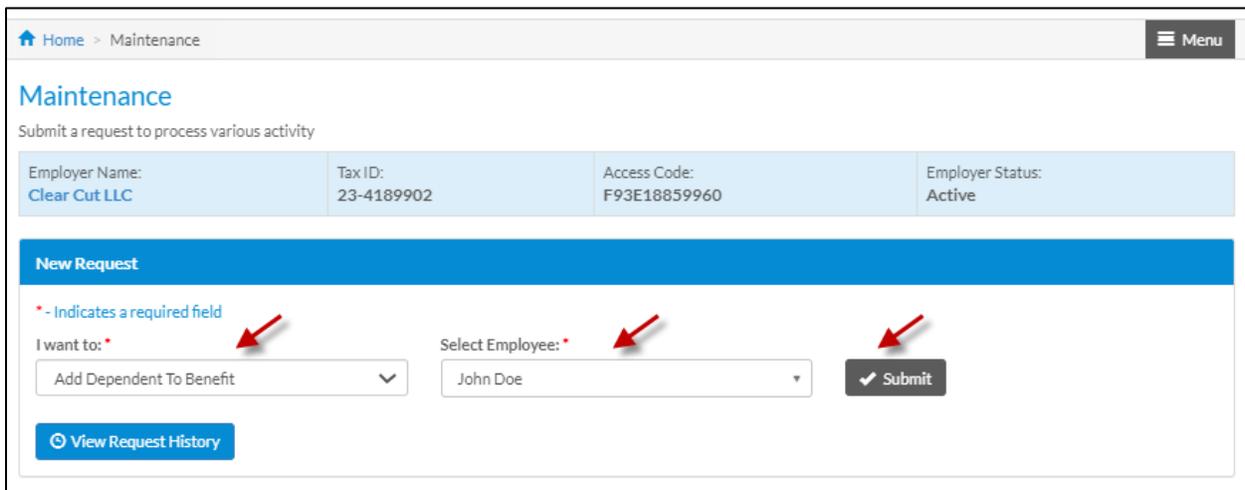
Allow a few minutes for the submission to sync and you will be able to view the benefits in the employee's record and/or the Dashboard

# Adding Dependent to Benefit

1. Select the menu icon and **click** on "Maintenance"



2. Select "Add Dependent to Benefit" under "I want to"
  - a. Select Employee by typing in the name which will auto populate some options to pick from
  - b. Select "Submit"



3. Enter parameters – Effective Date, Qualifying Event Date, & Reason

**New Request**

\* - Indicates a required field

I want to: \*  
Add Dependent To Benefit

Select Employee: \*  
John Doe

Submit

View Request History

---

**Add Dependent to Benefit**

\* - Indicates a required field

Effective Date \* 07/01/2020

Event Date \* 07/10/2020

Reason \* Marriage

Manage Dependent Show

Benefits Show

Cancel Submit Request

4. Select "show" under "Manage Dependent"

- a. Can add dependent in this field if dependent is missing from profile.
- b. Enter dependents' demographic details and hit **save**

**New Request**

\* - Indicates a required field

I want to: \*  
Add Dependent To Benefit

Select Employee: \*  
John Doe

Submit

View Request History

---

**Add Dependent to Benefit**

\* - Indicates a required field

Effective Date \* 07/01/2020

Event Date \* 07/10/2020

Reason \* Marriage

Manage Dependent Hide

Dependents Add Dependent

Relationship	First Name	Last Name	Gender	Date of Birth	SSN	Status
Spouse	Jane	Doe	Female	01/01/1990	222-22-2222	Active

No of Records :1

Benefits Show

Cancel Submit Request

5. Select "show" to expand the Benefits section.

a. Apply desired benefits

**New Request**

\* - Indicates a required field

I want to: \*  
Add Dependent To Benefit

Select Employee: \*  
John Doe

Submit

View Request History

**Add Dependent to Benefit**

\* - Indicates a required field

Effective Date: \*  
07/01/2020

Event Date: \*  
07/10/2020

Reason: \*  
Marriage

Manage Dependent Show

Benefits Hide

Group - Dental Hide

Dental PPO DTXHM09  
Effective Date: 01/01/2020 - 12/31/2020

Who is Covered?

Covered	Name	Relationship	Date of Birth
<input checked="" type="checkbox"/>	Jane Doe	Spouse	01/01/1990

\$47.77/month  
Cost Break Down

Group - Life Show

Group - Critical Illness Insurance Show

Cancel Submit Request

6. Click on Submit Request

Home > Maintenance

Request is successfully queued for processing.

**Maintenance**

Submit a request to process various activity

Employer Name: Clear Cut LLC	Tax ID: 23-4189902	Access Code: F93E18859960	Employer Status: Active
---------------------------------	-----------------------	------------------------------	----------------------------

**New Request**

\* - Indicates a required field

I want to: \*  
Add Dependent To Benefit

Select Employee: \*  
John Doe

Submit

View Request History

Allow a few minutes for the submission to sync and you will be able to view the benefits in the employee's record and/or the Dashboard

# Termining Dependent Benefits

1. Select the menu icon and **click** on "Maintenance"

The screenshot shows the 'Employee Information' page for 'Clear Cut LLC'. The page includes a header with 'MY COMPANY', navigation links, and a search bar. The main content area displays employee details for 'John Doe' and a table of addresses. A sidebar menu is open, with 'Maintenance' highlighted. A red arrow points to the 'Maintenance' menu item.

Address Name	Address1	Address2	City	State	Zipcode	Phone[Ext]
Home	8700 W Bryn Mawr Ave		Chicago	IL	60631	

2. Select "Term Dependent Benefit" under "I want to"
  - a. Select Employee by typing in the name which will auto populate some options to pick from
  - b. Select "Submit"

The screenshot shows the 'Maintenance' page with the 'New Request' form. The form includes a 'I want to:' dropdown menu with 'Term Dependent Benefit' selected, a 'Select Employee:' dropdown menu with 'John Doe' selected, and a 'Submit' button. Red arrows point to the dropdown menus and the 'Submit' button. A 'View Request History' button is also visible.

3. Enter parameters – Qualifying Event Date, Term Date, & Reason
  - a. The “Term Date” will be the LAST day the member should have active coverage

4. Select “Show” under “Benefits”

5. Select dependents to terminate and the effective till date will auto-fill

**Term Dependent Benefit**

\* - Indicates a required field

Event Date\*  Term Date\*  Reason\*

Comments\*

**Benefits** Hide

**Group - Health** Hide

**Choice Silver PPO 024-00**  
Effective Date: 01/01/2020 - 12/31/2020  
BlueCross BlueShield of Texas

Deductible: \$3000  
Plan Type: PPO  
Doctors Office Visits: \$40

**Select Dependent to Terminate**

Covered	Name	Relationship	Date of Birth
<input checked="" type="checkbox"/>	Jane Doe	Spouse	01/01/1990

\$27.26/month  
[Cost Break Down](#)

**Group - Dental** Show

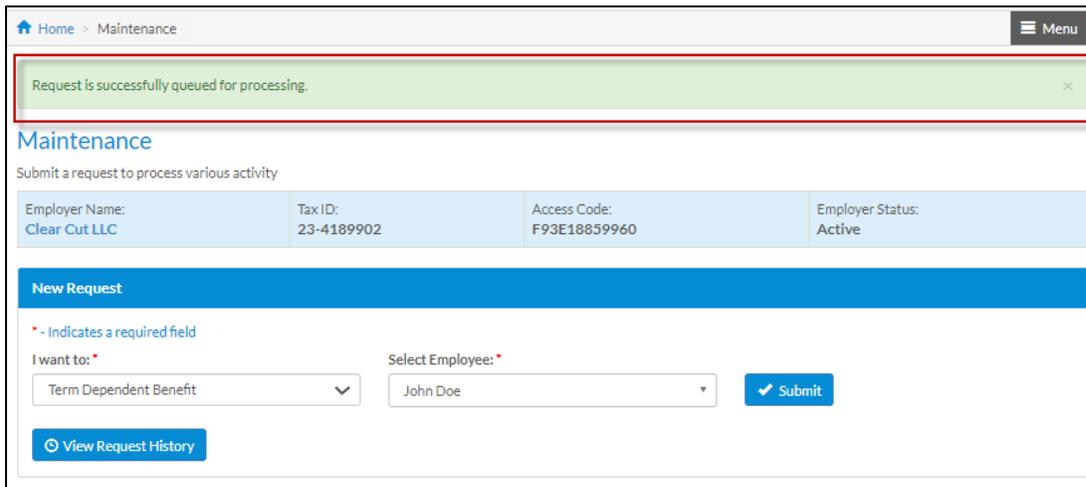
**Group - Life** Show

**Group - Critical Illness Insurance** Hide

**Critical Illness Insurance**  
Effective Date: 01/01/2020 - 12/31/2020  
MetLife

\$4.20/month  
[Cost Break Down](#)

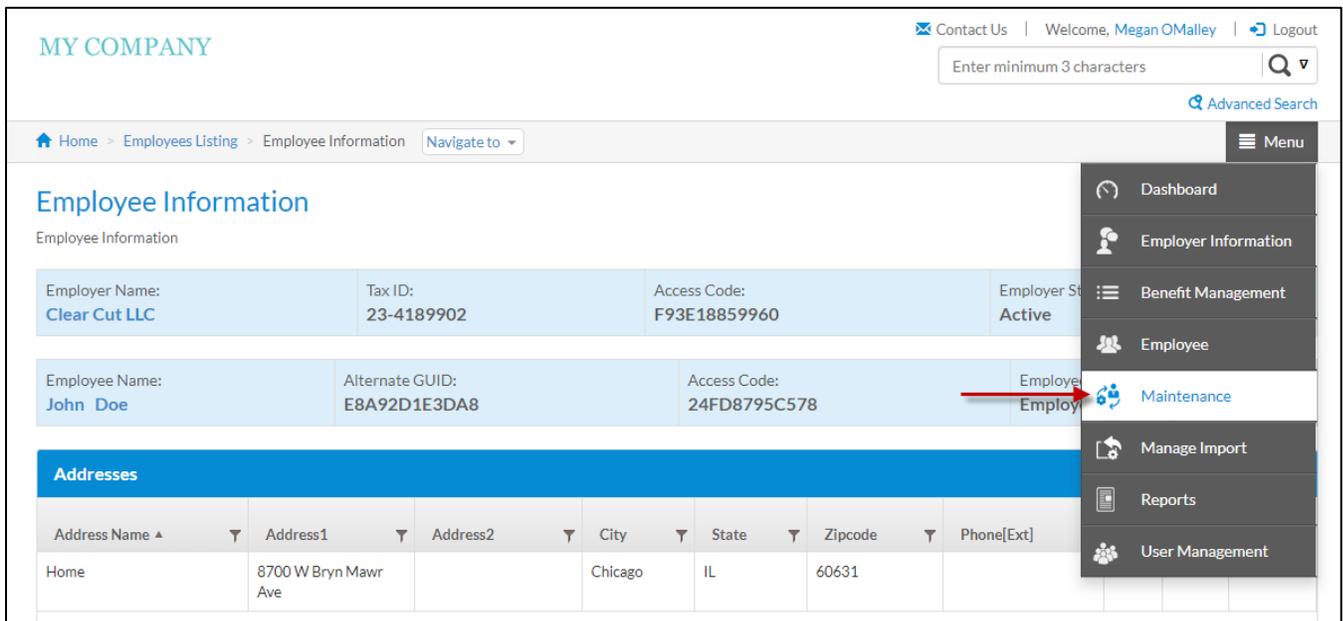
6. **Click** on Submit Request



## Opening Special Enrollment Window for an Employee

\*This function is for Employers who wish their employees to enroll in benefits on the platform directly. Prior to creating an “open enrollment window”, employers must send the Pre-Registration Link to the employees so they can create user profiles. Pre-Registration link can be found under the Notes & Documents section on the platform.

1. Select the menu icon and **click** on “Maintenance”



2. Select “Open Special Enrollment Window” under “I want to”
  - a. Select Employee by typing in the name which will auto populate some options to pick from
  - b. Select “Submit”

Home > Maintenance Menu

## Maintenance

Submit a request to process various activity

Employer Name: Clear Cut LLC	Tax ID: 23-4189902	Access Code: F93E18859960	Employer Status: Active
---------------------------------	-----------------------	------------------------------	----------------------------

**New Request**

\* - Indicates a required field

I want to: \*  Select Employee: \*  Submit

[View Request History](#)

3. Enter parameters – Effective Date, Qualifying Event Date, Reason, & Enrollment Start & End Dates

**Open Special Enrollment Window**

\* - Indicates a required field

Benefit Effective Date \*  Event Date \*  Reason \*

Comments \*  Enrollment Start Date  Enrollment End Date

4. Select all applicable benefits

### New Request

\* - Indicates a required field

I want to: \*

Open Special Enrollment Window

Select Employee: \*

John Doe

Submit

View Request History

### Open Special Enrollment Window

\* - Indicates a required field

Benefit Effective Date \*

07/01/2020

Event Date \*

06/16/2020

Reason \*

Others

Comments \*

New Hire

Enrollment Start Date

06/16/2020

Enrollment End Date

06/30/2020

### Benefit

<input checked="" type="checkbox"/>	Segment	Benefit Type	Benefit Name	Effective From	Effective Till	Enrollment Start Date	Enrollment End Date
<input checked="" type="checkbox"/>	Group	Accident Insurance	Accident Insurance	07/01/2020	12/31/2020	06/16/2020	06/30/2020
<input checked="" type="checkbox"/>	Group	Cancer Insurance	Cancer Insurance - 15,000	07/01/2020	12/31/2020	06/16/2020	06/30/2020
<input checked="" type="checkbox"/>	Group	Critical Illness Insurance	Critical Illness Insurance	07/01/2020	12/31/2020	06/16/2020	06/30/2020

5. **Click** on Submit Request

- a. The employee and primary employer contact will receive an email notification of this open enrollment window being created. \*The employee must receive the *registration* instructions from the admin. The email sent by the system will not include login instructions but is simply a notification the window has been created
- b. \*The employee will only receive the notification if their email has been entered in their Personal Details

The screenshot shows a web application interface. At the top, there is a breadcrumb trail: Home > Maintenance. A green notification box at the top states: "Request is successfully queued for processing." Below this, the page title is "Maintenance" with the subtitle "Submit a request to process various activity". A table displays employer information:

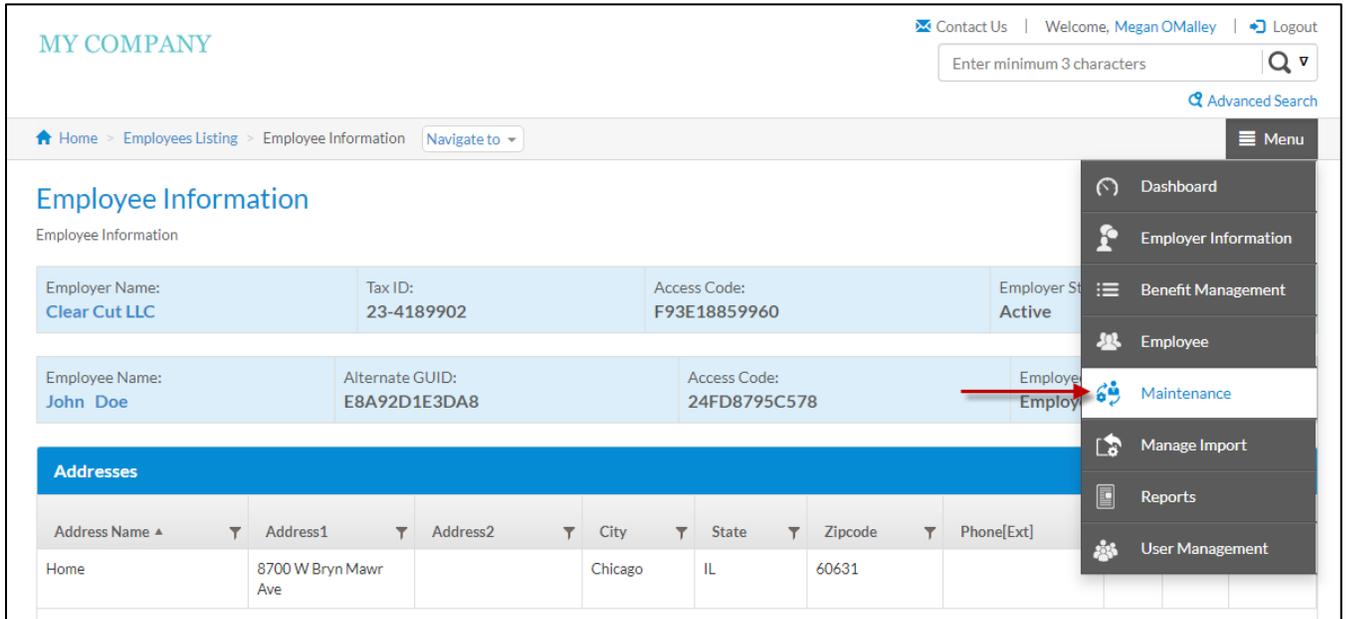
Employer Name: Clear Cut LLC	Tax ID: 23-4189902	Access Code: F93E18859960	Employer Status: Active
---------------------------------	-----------------------	------------------------------	----------------------------

Below the table is a "New Request" section. It includes a legend: "\* - Indicates a required field". There are two dropdown menus: "I want to:" with the selected option "Open Special Enrollment Window", and "Select Employee:" with the selected option "John Doe". A blue "Submit" button is to the right of the second dropdown. At the bottom left of this section is a blue button labeled "View Request History".

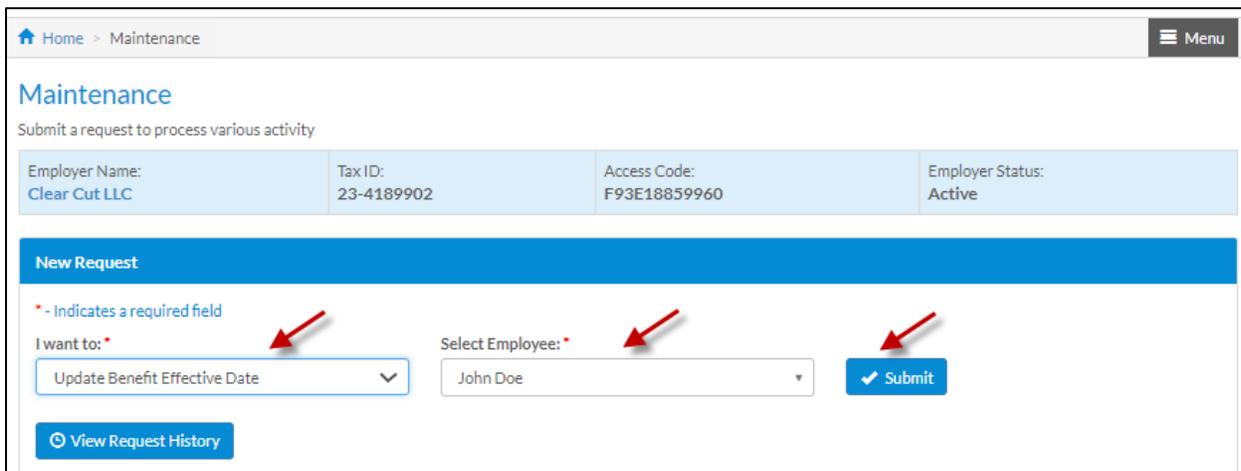
# Updating Benefit Effective Date

This function is useful when a mistake has been made in the initial adding of a benefit to an employee

1. Select the menu icon and **click** on "Maintenance"



2. Select "Update Benefit Effective Date" under "I want to"
  - a. Select Employee by typing in the name which will auto populate some options to pick from
  - b. Select "Submit"



3. Enter Parameters – Effective Date, Qualifying Event Date, & Reason

The screenshot shows the 'New Request' form with the following fields and values:

- I want to:** Update Benefit Effective Date
- Select Employee:** Megan O'Malley
- Submit:** [Submit]
- View Request History:** [View Request History]
- Update Benefit Effective Date:**
  - Effective Date:** 07/01/2020
  - Event Date:** 06/16/2020
  - Reason:** Others
  - Comments:** Benefit Correction

Red arrows point to the Effective Date, Event Date, Reason, and Comments fields.

4. Select benefits to update and the effective date will auto-fill

The screenshot shows the 'New Request' form with the following fields and values:

- I want to:** Update Benefit Effective Date
- Select Employee:** John Doe
- Submit:** [Submit]
- View Request History:** [View Request History]
- Update Benefit Effective Date:**
  - Effective Date:** 07/01/2020
  - Event Date:** 06/16/2020
  - Reason:** Others
  - Comments:** Benefit Correction
- Benefits Table:**

Segment	Benefit Type	Benefit Name	Effective From	Effective Till
<input checked="" type="checkbox"/>	Group	Critical Illness Insurance	07/01/2020	12/31/2020
<input type="checkbox"/>	Group	Dental	01/01/2020	12/31/2020
<input type="checkbox"/>	Group	Life	01/01/2020	12/31/2020

Red arrows point to the 'Effective From' column of the 'Critical Illness Insurance' row and the 'Submit Request' button.

5. Click on Submit Request

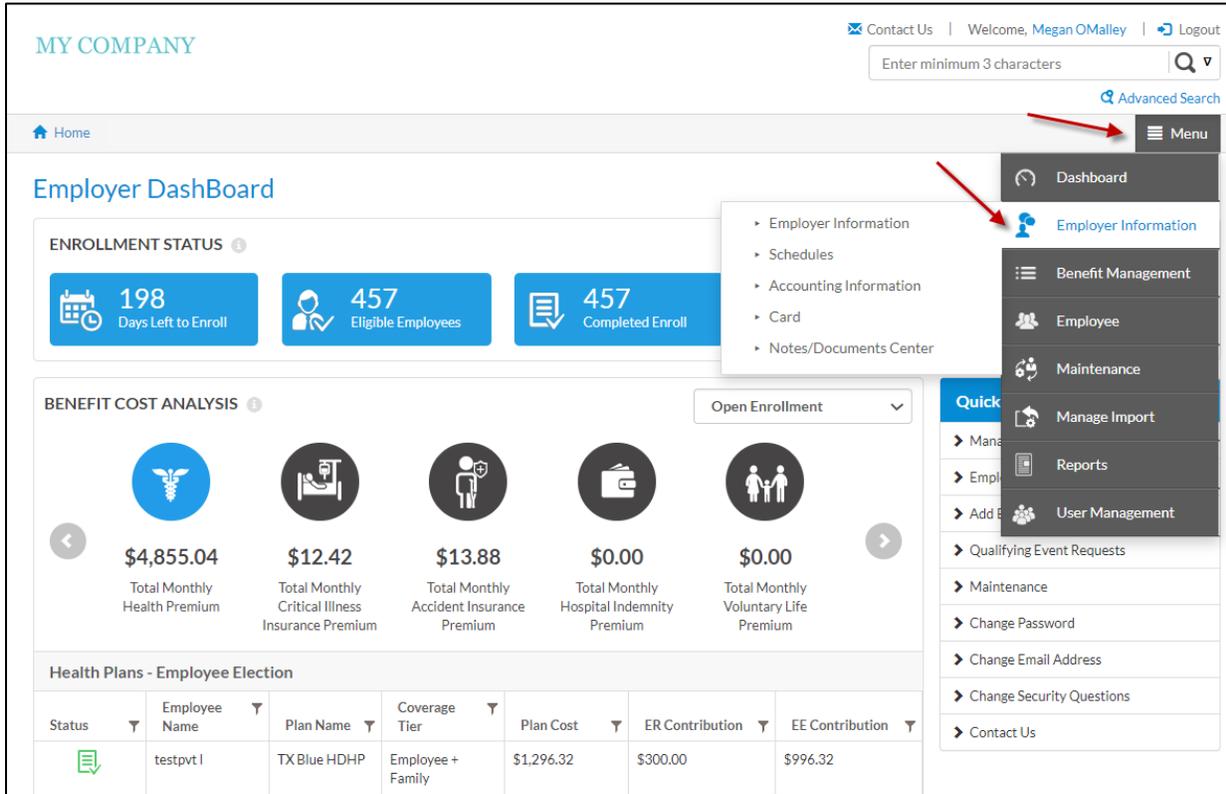
The screenshot shows the 'Maintenance' page with the following elements:

- Home > Maintenance** (with a Menu icon)
- Request is successfully queued for processing.** (Message box)
- Maintenance** (Section header)
- Submit a request to process various activity** (Text)
- Employer Name:** Clear Cut LLC
- Tax ID:** 23-4189902
- Access Code:** F93E18859960
- Employer Status:** Active
- New Request:**
  - I want to:** Update Benefit Effective Date
  - Select Employee:** John Doe
  - Submit:** [Submit]
  - View Request History:** [View Request History]

# Invoices & Payment History

## How to Download an Invoice

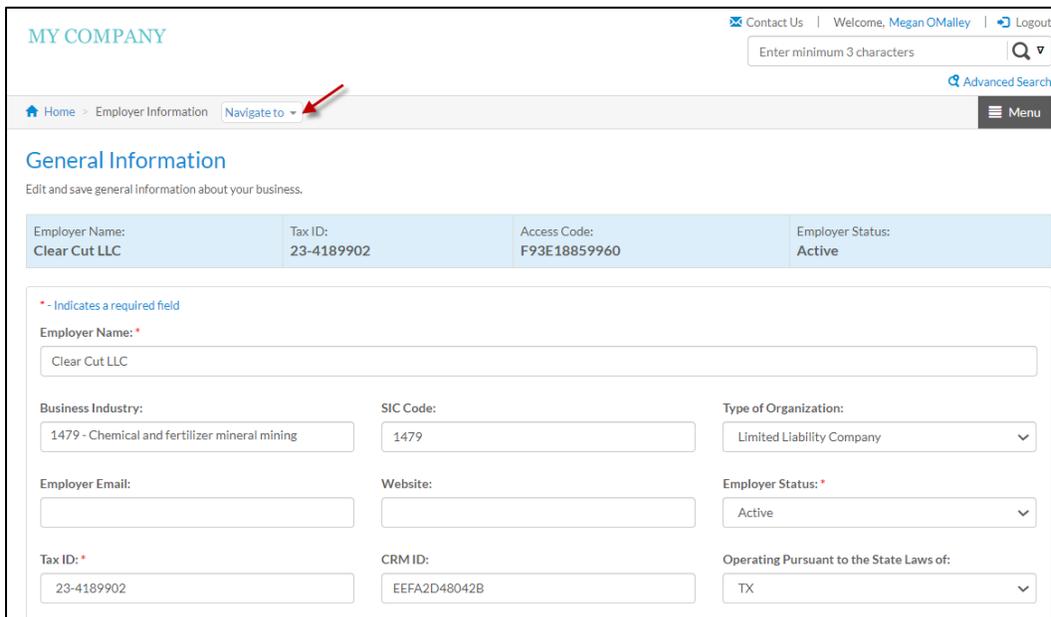
1. Select the menu icon and **click** on “Employer Information”



The screenshot shows the 'MY COMPANY' dashboard. At the top right, there are links for 'Contact Us', 'Welcome, Megan OMalley', and 'Logout'. A search bar is present with the text 'Enter minimum 3 characters'. Below this is an 'Advanced Search' link. The main navigation bar includes a 'Home' link and a 'Menu' icon. The 'Menu' dropdown is open, showing options: Dashboard, Employer Information (highlighted with a red arrow), Benefit Management, Employee, Maintenance, Manage Import, Reports, User Management, Qualifying Event Requests, Change Password, Change Email Address, Change Security Questions, and Contact Us. The dashboard content includes an 'ENROLLMENT STATUS' section with three cards: '198 Days Left to Enroll', '457 Eligible Employees', and '457 Completed Enroll'. Below this is a 'BENEFIT COST ANALYSIS' section with five cards showing various premium amounts: \$4,855.04 (Health), \$12.42 (Critical Illness), \$13.88 (Accident Insurance), \$0.00 (Hospital Indemnity), and \$0.00 (Voluntary Life). At the bottom, there is a 'Health Plans - Employee Election' table.

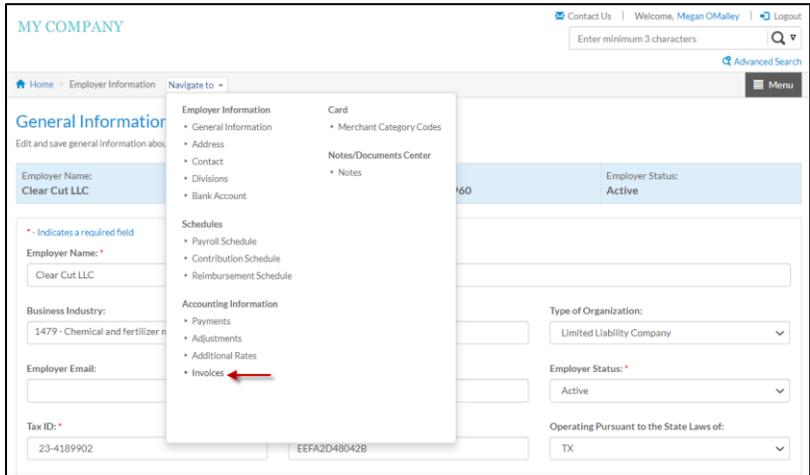
Status	Employee Name	Plan Name	Coverage Tier	Plan Cost	ER Contribution	EE Contribution
	testpvt I	TX Blue HDHP	Employee + Family	\$1,296.32	\$300.00	\$996.32

2. A new “Navigate To” dropdown menu appears
3. Select “Navigate To”



The screenshot shows the 'MY COMPANY' 'General Information' page. At the top right, there are links for 'Contact Us', 'Welcome, Megan OMalley', and 'Logout'. A search bar is present with the text 'Enter minimum 3 characters'. Below this is an 'Advanced Search' link. The main navigation bar includes a 'Home' link, 'Employer Information', and a 'Navigate to' dropdown menu (highlighted with a red arrow). The 'Menu' icon is also visible. The page content includes a header 'General Information' and a sub-header 'Edit and save general information about your business.' Below this is a table with employer details: Employer Name: Clear Cut LLC, Tax ID: 23-4189902, Access Code: F93E18859960, Employer Status: Active. Below the table is a form with various fields: Employer Name (required), Business Industry (1479 - Chemical and fertilizer mineral mining), SIC Code (1479), Type of Organization (Limited Liability Company), Employer Email, Website, Employer Status (required, Active), Tax ID (required, 23-4189902), CRM ID (EEFA2D48042B), and Operating Pursuant to the State Laws of (TX).

4. Select "Invoices" under "Accounting Information"



5. The invoice number is a clickable PDF copy of the respective invoice, available to download

Home > Accounting Information

### Invoices

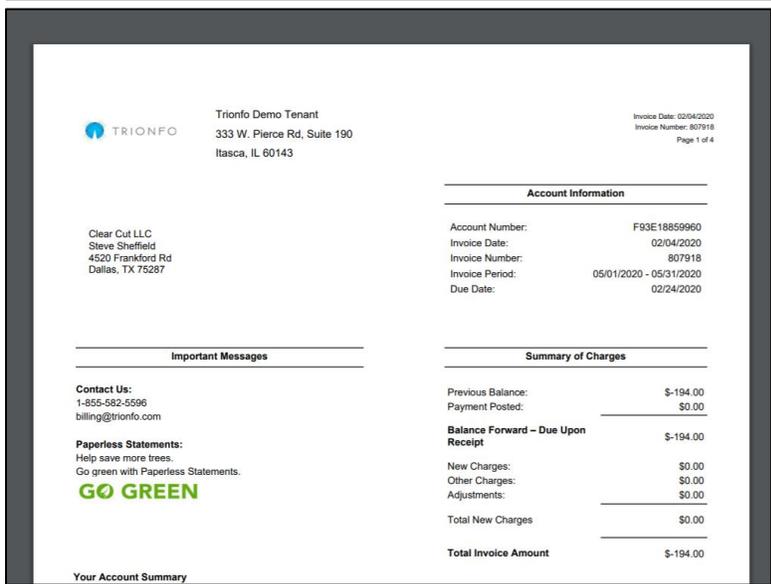
Listing of invoices

Employer Name: Clear Cut LLC | Tax ID: 23-4189902 | Access Code: F93E18859960 | Employer Status: Active

Search Invoices [Show]

Invoicing [Pay Now]

Billing Type	Invoice Date	Invoice No	Billing Period	Invoice Amount	Non Carried Amount	Payments	Adjustments	Balance	Status
Single Division Billing	02/04/2020	<a href="#">807918</a>	05/01/2020 to 05/31/2020	(\$194.00)	\$0.00	\$0.00	\$0.00	\$0.00	Partially Paid
Single Division Billing	01/30/2020	<a href="#">454126</a>	04/01/2020 to 04/30/2020	(\$194.00)	\$0.00	\$0.00	\$0.00	\$0.00	Paid
Single Division Billing	01/30/2020	<a href="#">411120</a>	03/01/2020 to 03/31/2020	(\$194.00)	\$0.00	\$0.00	\$0.00	\$0.00	Paid
Single Division Billing	01/30/2020	<a href="#">526992</a>	01/01/2020 to 01/31/2020	\$550.00	\$0.00	\$0.00	\$500.00	\$0.00	Paid



# How to View Payment History

1. Select the menu icon and **click** on "Employer Information"

The screenshot shows the 'MY COMPANY' Employer Dashboard. At the top right, there are links for 'Contact Us', 'Welcome, Megan OMalley', and 'Logout', along with a search bar. Below this is a navigation bar with a 'Home' link and a 'Menu' icon. The 'Menu' icon is highlighted with a red arrow. A dropdown menu is open, showing options: 'Dashboard', 'Employer Information', 'Benefit Management', 'Employee', 'Maintenance', 'Manage Import', 'Reports', 'User Management', 'Qualifying Event Requests', 'Maintenance', 'Change Password', 'Change Email Address', 'Change Security Questions', and 'Contact Us'. The 'Employer Information' option is highlighted with a red arrow. Below the menu, the dashboard displays 'ENROLLMENT STATUS' with three cards: '198 Days Left to Enroll', '457 Eligible Employees', and '457 Completed Enroll'. Below that is a 'BENEFIT COST ANALYSIS' section with five cards showing monthly premiums: Health (\$4,855.04), Critical Illness (\$12.42), Accident Insurance (\$13.88), Hospital Indemnity (\$0.00), and Voluntary Life (\$0.00). At the bottom, there is a 'Health Plans - Employee Election' table.

Status	Employee Name	Plan Name	Coverage Tier	Plan Cost	ER Contribution	EE Contribution
	testpvt I	TX Blue HDHP	Employee + Family	\$1,296.32	\$300.00	\$996.32

2. A new "Navigate To" dropdown menu appears
3. Select "Navigate To"

The screenshot shows the 'MY COMPANY' 'General Information' page. At the top right, there are links for 'Contact Us', 'Welcome, Megan OMalley', and 'Logout', along with a search bar. Below this is a navigation bar with a 'Home' link, 'Employer Information', and a 'Navigate to' dropdown menu. The 'Navigate to' dropdown menu is highlighted with a red arrow. Below the navigation bar, there is a 'General Information' section with a form containing various fields: 'Employer Name: Clear Cut LLC', 'Tax ID: 23-4189902', 'Access Code: F93E18859960', 'Employer Status: Active', 'Business Industry: 1479 - Chemical and fertilizer mineral mining', 'SIC Code: 1479', 'Type of Organization: Limited Liability Company', 'Employer Email:', 'Website:', 'Employer Status: Active', 'Tax ID: 23-4189902', 'CRM ID: EEFA2D48042B', and 'Operating Pursuant to the State Laws of: TX'.

4. Select "Payments" under "Accounting Information"

MY COMPANY Contact Us | Welcome, Megan OMalley | Logout

Enter minimum 3 characters

[Advanced Search](#)

Home > Employer Information Navigate to ▾ Menu

- Employer Information
  - General Information
  - Address
  - Contact
  - Divisions
  - Bank Account
- Schedules
  - Payroll Schedule
  - Contribution Schedule
  - Reimbursement Schedule
- Accounting Information
  - Payments ←
  - Adjustments
  - Additional Rates
  - Invoices
- Card
  - Merchant Category Codes
- Notes/Documents Center
  - Notes

**General Information**  
Edit and save general information about your company.

Employer Name: **Clear Cut LLC**

Employer Status: **Active**

\* - Indicates a required field

Employer Name: \*

Business Industry:

Employer Email:

Tax ID: \*

Type of Organization:

Employer Status: \*

Operating Pursuant to the State Laws of:

5. All payment history is available to view, including payment type

Home > Accounting Information Navigate to ▾ Menu

**Payments**  
Manage payments

Employer Name: **Clear Cut LLC** Tax ID: **23-4189902** Access Code: **F93E18859960** Employer Status: **Active**

**Search Payments**

From Date:  To Date:  Invoice No:

Type:  Instrument Number:

**Payment Information**

Received Date	Postmark Date	Memo	Type	Instrument Number	Total Amount	Created Date	Payment Status
01/30/2020	01/30/2020		ACH	879	\$450.00	01/30/2020	Processed
01/30/2020	01/30/2020		Check/e-check	789	\$294.00	01/30/2020	Processed
01/30/2020	01/30/2020		Check/e-check	897	\$6,738.99	01/30/2020	Processed
11/22/2019	11/22/2019		Check/e-check	234	\$700.00	11/22/2019	Processed
11/12/2019	11/12/2019		ACH	Demo123	\$500.00	11/12/2019	Processed
02/25/2019	02/25/2019	Check payment	Check/e-check	122112	\$3,348.51	02/25/2019	Processed
02/25/2019	02/25/2019	123110	Check/e-check	78890	\$8,238.99	02/25/2019	Processed
02/25/2019	02/25/2019	#121	Check/e-check	83492	\$230.11	02/25/2019	Processed
02/25/2019	02/25/2019	12331	ACH	AB122431	\$8,038.99	02/25/2019	Processed
02/25/2019	02/25/2019	22131	ACH	8722391	\$8,038.99	02/25/2019	Processed

No of Records : 27 1 2 3 1 - 10 of 27 items

# Notes & Documents Center

The Notes & Documents Center is a valuable resource for the administrator. Welcome Letters, Certificate Booklets, and other pertinent information will be made viewable to the administrator. Any admins can add their own notes and upload attachments for record-keeping. The Admins can also opt to make these notes/attachments viewable by employees.

1. Select the menu icon and **hover over** "Employer Information"
2. Select "Notes/Documents Center"

The screenshot displays the 'MY COMPANY' Employer Dashboard. At the top right, there are links for 'Contact Us', 'Welcome, Megan OMalley', and 'Logout'. A search bar is present with the text 'Enter minimum 3 characters'. Below the search bar is an 'Advanced Search' link. The main navigation menu is open, showing options like 'Dashboard', 'Employer Information', 'Benefit Management', 'Employee', 'Maintenance', 'Manage Import', 'Reports', 'User Management', 'Qualifying Event Requests', 'Maintenance', 'Change Password', 'Change Email Address', 'Change Security Questions', and 'Contact Us'. A red arrow points to the 'Menu' icon, and another red arrow points to the 'Notes/Documents Center' option in the dropdown menu. The dashboard content includes an 'ENROLLMENT STATUS' section with three cards: '198 Days Left to Enroll', '457 Eligible Employees', and '457 Completed Enroll'. Below this is a 'BENEFIT COST ANALYSIS' section with five cards showing various premium amounts: Total Monthly Health Premium (\$4,855.04), Total Monthly Critical Illness Insurance Premium (\$12.42), Total Monthly Accident Insurance Premium (\$13.88), Total Monthly Hospital Indemnity Premium (\$0.00), and Total Monthly Voluntary Life Premium (\$0.00). At the bottom, there is a 'Health Plans - Employee Election' table.

Status	Employee Name	Plan Name	Coverage Tier	Plan Cost	ER Contribution	EE Contribution
	testpvt I	TX Blue HDHP	Employee + Family	\$1,296.32	\$300.00	\$996.32

3. All resources are available in this center – Certificate Booklets, Welcome Letter, Pre-Registration Link, etc.

MY COMPANY Contact Us | Welcome, Megan O'Malley | Logout

Enter minimum 3 characters

[Advanced Search](#)

Home > Notes/Documents Center

### Notes

Add notes and attachment documents for your reference. The notes and or attachments can be shared with your employer by using the "Lock" selection "Yes" or "No".

Employer Name: Clear Cut LLC	Tax ID: 23-4189902	Access Code: F93E18859960	Employer Status: Active
---------------------------------	-----------------------	------------------------------	----------------------------

Notes/Document center

Type	Subject	User	Created Date	Modified Date	IsLocked
Note	Updated Portal Registration Instr...	Steve Sheffield	10/18/2019 02:26:46 PM	04/24/2020 08:03:11 PM	Yes
Note	Company Announcement Cafeteri...	Steve Sheffield	04/15/2019 03:53:07 PM	04/15/2019 03:53:07 PM	Yes
Note	Today 1/31/2019	Ashley Larson	01/31/2019 12:34:14 PM	04/24/2020 08:03:11 PM	No
Note	Reporting Extracts	Demo-TPA Admin	08/19/2018 12:17:37 PM	08/19/2018 12:17:37 PM	No

4. To add a note/resource, select "Add Note"

Home > Notes/Documents Center

### Notes

Add notes and attachment documents for your reference. The notes and or attachments can be shared with your employer by using the "Lock" selection "Yes" or "No".

Employer Name: Clear Cut LLC	Tax ID: 23-4189902	Access Code: F93E18859960	Employer Status: Active
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Note	Today 1/31/2019	Ashley Larson	01/31/2019 12:34:14 PM	04/24/2020 08:03:11 PM	No

5. Choose whether to make the note visible to employees or not, add attachments, etc. & **click** "Save"

**Add Note**

\* - Mandatory fields

ID:  Note Date:  Type:

Locked?:  Note Visible To:  Employee

Subject:

Message: \*(Maximum 1000 Characters)

Characters Allowed: 1000

**Attachments**

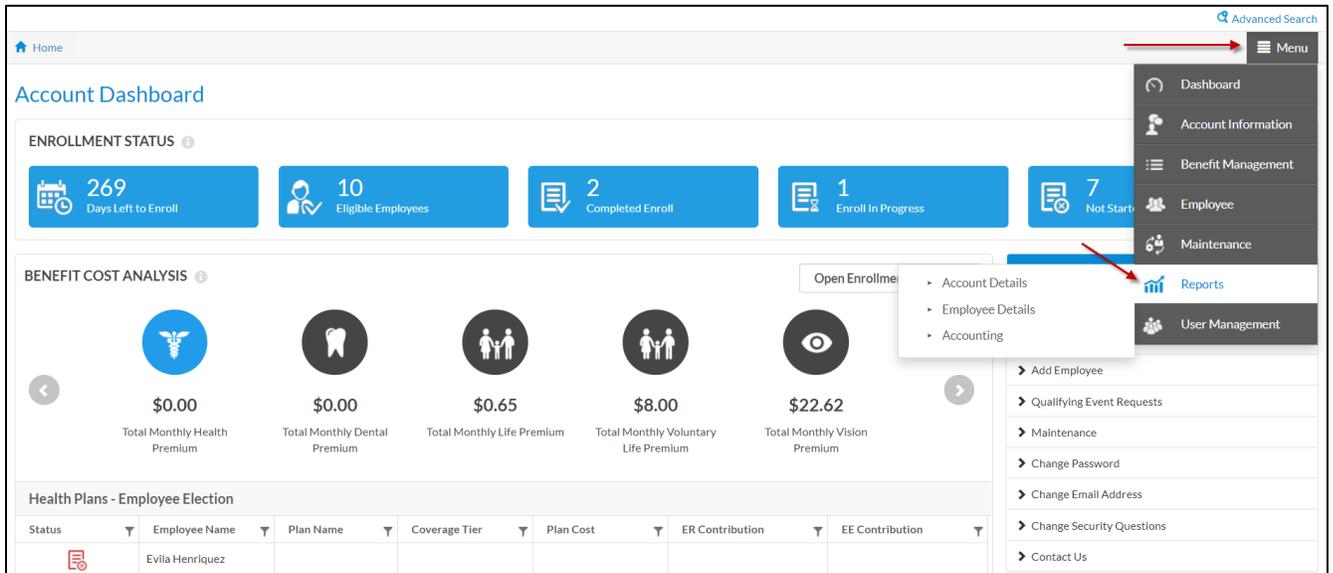
Document Name	Download
No Records Found!	

# How to Pull Reports

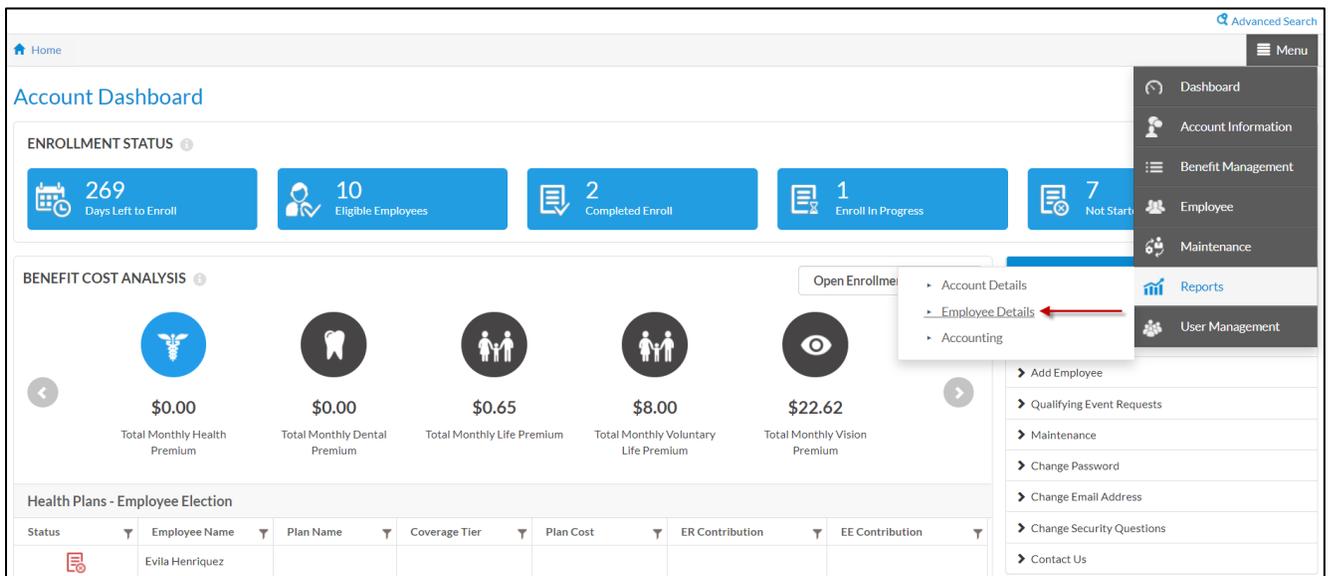
Reports are available to download in Excel and CSV files but CSV is always the preferred method as it includes ALL data. You can always Save As an excel document after downloading.

## Employee Reports

1. Select the menu icon and **hover over** "Reports"



2. Select "Employee Details"



3. Select Desired Report

- a. Company Wide Enrollment – This is useful for tracking employee enrollment when a group is undergoing a company-wide open enrollment
- b. Special Enrollment Report – This is useful for tracking employee enrollment when employees are undergoing special enrollment periods set by the group administrator
- c. Employee Benefit Report – This is a full census extraction of all employees (active and terminated), their dependents, and all benefits as of the present date of report extraction

Home > Employee Details

Advanced Search

Menu

### Employee Details Report

Report Data Hide

Report Name	Report Description
<input type="radio"/> Company Wide Enrollment	This report will show Enrollment data for employees experiencing an Open Enrollment
<input type="radio"/> Special Enrollment Report	This report will show enrollment data for employees experiencing a Special Enrollment
<input checked="" type="radio"/> Employee Benefit Report	This report will list details of the employee benefits including deductions

Report Filter Hide

Accounts \* Flex Employer Demo Bentegro DND

Employees \* 10 selected

Filter --Select Filter--

Condition --Condition--

Search Value Enter search value

+

Generate Report

#### 4. Select "Generate Report"

Home > Employee Details

Advanced Search

Menu

### Employee Details Report

Report Data Hide

Report Name	Report Description
<input type="radio"/> Company Wide Enrollment	This report will show Enrollment data for employees experiencing an Open Enrollment
<input type="radio"/> Special Enrollment Report	This report will show enrollment data for employees experiencing a Special Enrollment
<input checked="" type="radio"/> Employee Benefit Report	This report will list details of the employee benefits including deductions

Report Filter Hide

Accounts \* Flex Employer Demo Bentegro DND

Employees \* 10 selected

Filter --Select Filter--

Condition --Condition--

Search Value Enter search value

+

Generate Report

5. Select "Export to CSV"

The screenshot shows the 'Employee Benefit Report' interface. At the top, there are fields for 'Accounts' (Flex Employer Demo Bentegro DND) and 'Employees' (10 selected). Below these are filter options for 'Filter', 'Condition', and 'Search Value'. A 'Generate Report' button is on the right. The main area displays a table with columns: Account Name, Relationship Type, Employee Name, SSN, Benefit Name, Benefit Type, and Effective From. The table contains three rows of data. A dropdown menu is open over the table, showing 'Export to' options: 'Excel' and 'CSV'. A red arrow points to the 'CSV' option. Below the table, a box indicates 'Total no. of Records : 3'.

Account Name	Relationship Type	Employee Name	SSN	Benefit Name	Benefit Type	Effective From
Flex Employer Demo Bentegro DND	Self	James Zito	XXX-XX-1217	Term Life- EM- Life 1-B w/ AD&D	Life	03/16/2021
Flex Employer Demo Bentegro DND	Self	James Zito	XXX-XX-1217	Vision- EM-Vision 11	Vision	03/16/2021
Flex Employer Demo Bentegro DND	Self	John Doe	XXX-XX-8888	Flex HSA	HSA	03/01/2021

6. Open Document and Save As Excel – This step is necessary in order to save any filters/pivot tables used in reading the data

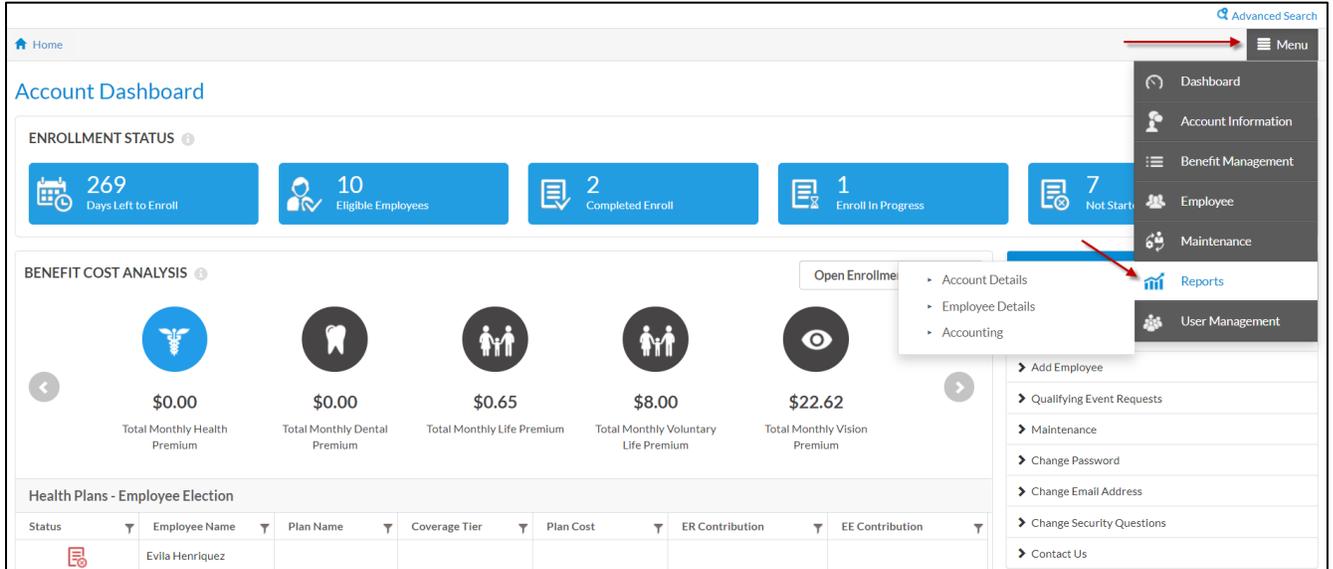
This screenshot shows a zoomed-in view of the 'Employee Benefit Report' table. The table has two columns: 'Account Name' and 'Relationship Type'. It contains three rows of data. Below the table, a box indicates 'Total no. of Records : 3'. At the bottom of the interface, a file name 'EmployeeBenefitRe....csv' is displayed with a red arrow pointing to it.

Account Name	Relationship Type
Flex Employer Demo Bentegro DND	Self
Flex Employer Demo Bentegro DND	Self
Flex Employer Demo Bentegro DND	Self

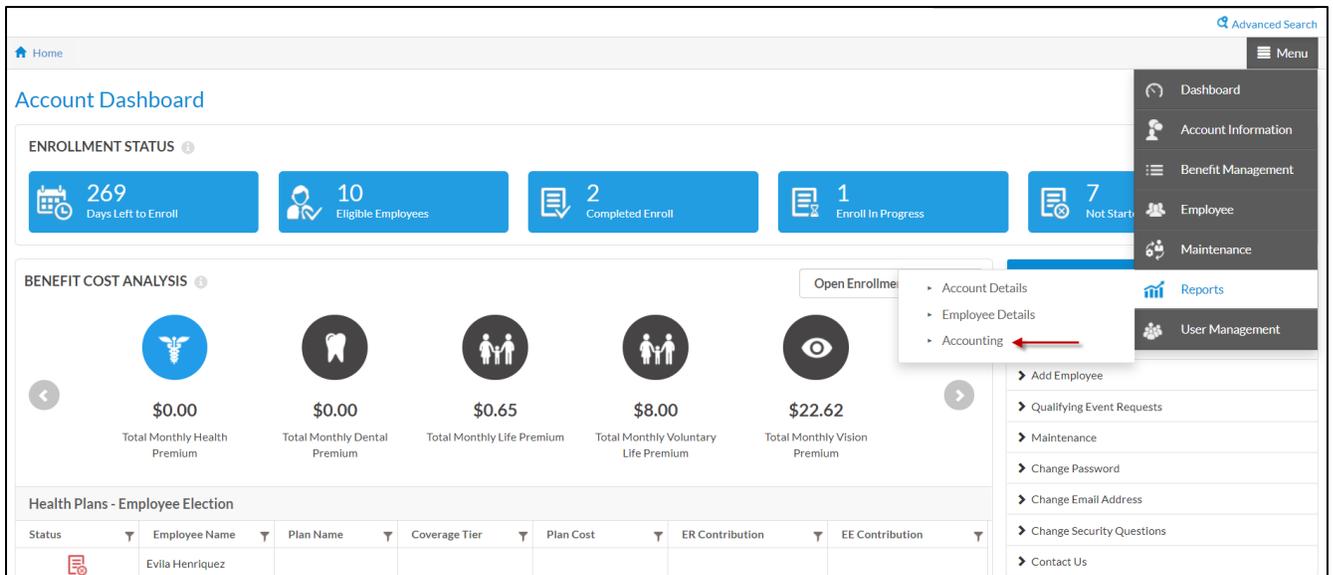
# Accounting Reports

Accounting Reports refer to invoice history

1. Select the menu icon and **hover over** "Reports"



2. Select "Accounting"



3. Select "Invoice Detail Report"

Accounting Report

Accounting Report

**Report Data**

	Report Name	Report Description
<input type="radio"/>	Invoice List Report	Contains Invoice List for the Report
<input checked="" type="radio"/>	Invoice Detail Report 	Contains Invoice details for the Report 
<input type="radio"/>	Aging	Contains Aging for the Report
<input type="radio"/>	Outstanding Balances	Contains Outstanding Balances for the Report
<input type="radio"/>	Payment List	Contains Payment List for the Report
<input type="radio"/>	Adjustments List	Contains Adjustments List for the Report
<input type="radio"/>	Journal	Contains Journal for the Report
<input type="radio"/>	Collection List	Contains Collection List for the Report

4. Select "Account" as the **Source Type**

<input checked="" type="radio"/>	Invoice Detail Report	Contains Invoice details for the Report
<input type="radio"/>	Aging	Contains Aging for the Report
<input type="radio"/>	Outstanding Balances	Contains Outstanding Balances for the Report
<input type="radio"/>	Payment List	Contains Payment List for the Report
<input type="radio"/>	Adjustments List	Contains Adjustments List for the Report
<input type="radio"/>	Journal	Contains Journal for the Report
<input type="radio"/>	Collection List	Contains Collection List for the Report

**Report Filter**

Source Type \*  Account Account

Account \*

Filter  Condition  Search Value

5. Select "Generate Report"

Report Filter Hide

Source Type\* Account Account\* Flex Employer Demo Bentegro DND Employees Select Employees

Filter --Select Filter-- Condition --Condition-- Search Value Enter search value

Generate Report

6. Select "Export to CSV"

Generate Report

Invoice Detail Report

Invoice Date	Transaction Type	Account Name	Invoice Number	Billing From Date	Billing To Date	Amount	Member Firstname	Member Lastname	Cove
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Export to

- Excel
- CSV

7. Open Document and Save As Excel – This step is necessary in order to save any filters/pivot tables used in reading the data

# Employee Guide

## Registering for the Platform

1. You will receive an email with the registration instructions and a pre-registration link from your employer similar to the following template:

Your employees can now register online to access the Employee portal!  
Employee Registration Instructions:

Click *\*HYPERLINK\** to begin the registration process

Select "Employee" as the User Type Enter the following fields:

1. Full Name (Firstname Lastname eg:John Doe)
2. Last 4 digits of SSN
3. Date of Birth
4. Zipcode
5. Captcha Code

Click on Next

Create a User Name,Email Address,Password and Security Questions

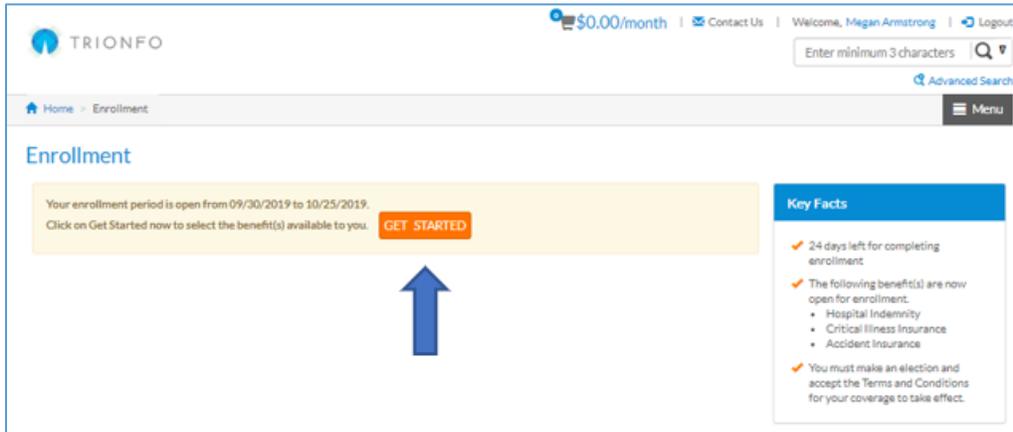
Agree to the Terms and Conditions and Privacy Policy

Click "Submit"

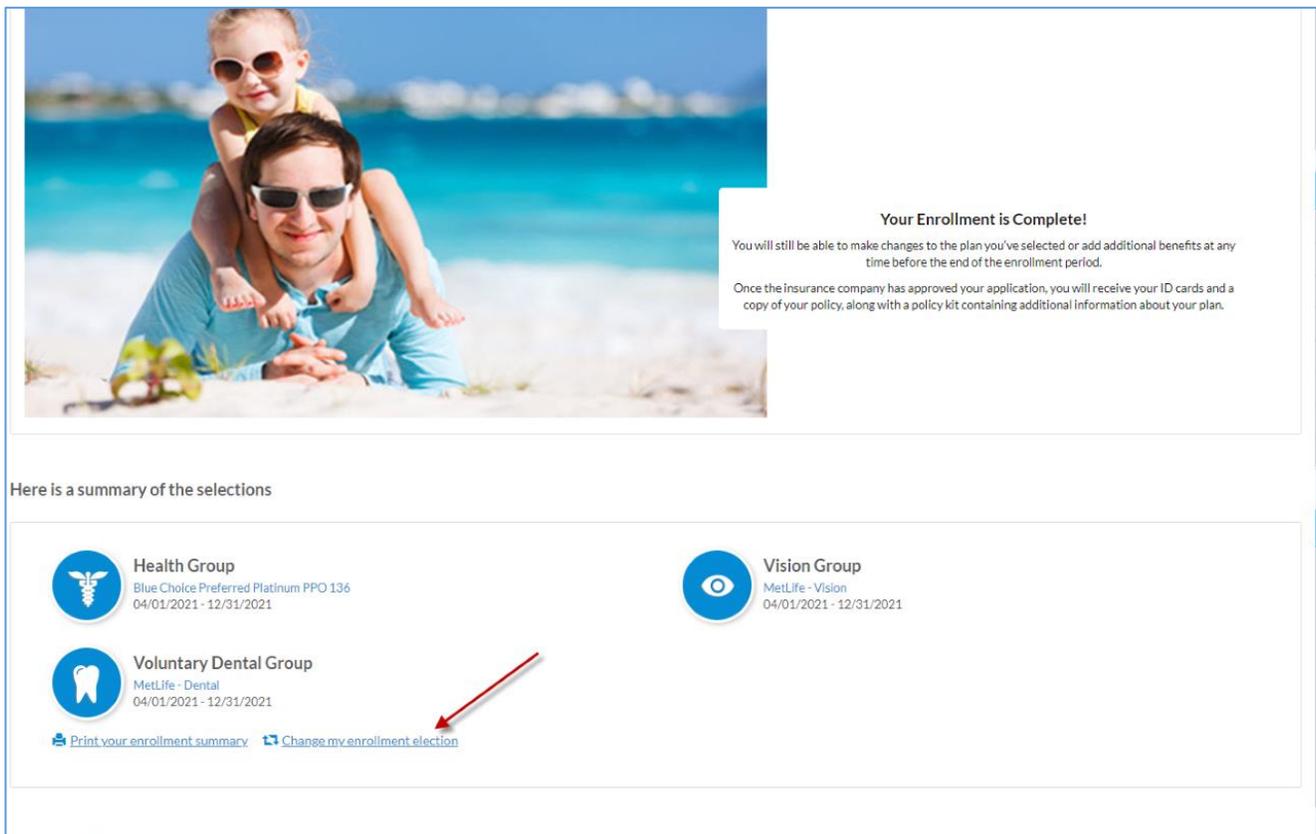
Thank you for using the platform

# Enrolling in Benefits

1. If your employer has created a special enrollment window for you, upon logging in you will see a "Get Started" button to begin enrolling in benefits based on your window parameters. Changes to enrollment can only be made while the enrollment window is open



- a. If you do not see a "Get Started" button, you may need to select "Change my Enrollment"



2. Verify all demographic details, make changes, and add dependents at this time (if applicable)
3. Select "Save & Continue"

The screenshot shows the TRIONFO 'Verify Profile Information' page. The user is logged in as Megan Armstrong. The form is divided into several sections:

- Basic Information:** Fields for First Name (Megan), MI, Last Name (Armstrong), Gender (Female), Date of Birth (08/10/1991), Date of Hire (01/01/2019), Height (0 ft 0 in), Weight (0 lbs), Use Tobacco? (No), Email Address (marmstrong@test1.com), Employee Annual Salary (\$0.00), SSN (111-11-1111), and SSN Last 4 Digit (1111).
- Address:** Fields for Address 1 (8700 W BRYN MAWR AVE), Address 2, City (CHICAGO), State (IL), Country (USA), Zipcode (00001), and County (Cook).
- Dependents:** A table with columns for Relationship, First Name, Last Name, Gender, Date of Birth, and SSN. It shows 'No Records Found!' and a link to 'Click here to identify eligible dependents'.

At the bottom of the form, there are two buttons: 'Back' and 'Save & Continue'. A blue arrow points to the 'Save & Continue' button.

4. Scroll through all benefit offerings and hit "Apply" to elect or "Waive" to opt out of the listed benefit

5. Select "Save & Continue"

Group - Accident Insurance

MetLife - Group Accident  
Effective Date: 01/01/2020 - 12/31/2020

Who is Covered?  
No dependents found!

\$12.80/month  
Cost Break Down  
Apply

Type	File Name
Document	Accident Benefit Summary_Wausau.pdf

Tax Type: Post Tax

Waive Coverage

Back Save & Continue

6. Confirm all elections by checking the "Acknowledgement Confirmation"

7. Select "Save & Continue"

- a. From this window you can print a copy of your enrollment summary

Benefit Election Summary

Review the benefits selected and submit your enrollment.

Print

How would you like your costs to be represented? Annual Monthly Pay Per Period

Group Selected Plans

The summarized detail of elected group plans are as given below:

MetLife - Group Accident  
Effective Date: 01/01/2020 - 12/31/2020

Who is Covered?  
No dependents covered!

\$12.80/month  
Cost Break Down

Total Plan Cost:	\$12.80
Employer Contributions:	-\$0.00
Your Cost:	\$12.80

Total Amount: \$12.80/month

Disclaimers:

I understand that the portal will facilitate enrollment into insurance plans and other types of benefits that may be offered by different companies. My enrollment in the coverage's that are selected is voluntary and has been done at my own discretion. I acknowledge that the application questions have been completed by me or a legal authorized representative on my behalf. I attest that any information that has been disclosed is accurate and complete to the best of my ability. I understand that some plans may require my dependent children or other family members to apply separately upon reaching a certain age or for other reasons.

I understand that payment for any plan that I enroll in will be required based on the payment option(s) that I select with the insurance company or benefits provider. I understand that the rates for any plan in which I enroll in are not final until I receive written notification from the insurance company or benefits provider. I also understand that these rates may not be guaranteed for any period of time. I understand that the effective date that I select for any plan is not final until I receive written notification from the insurance company or benefits provider. I understand that I should review the terms of my coverage before seeing any medical provider.

I understand that my information will be provided to the insurance company or benefits provider of any plan in which I choose to enroll. I understand that the portal does not accept responsibility or liability for any damages that may arise from their use of your information. I understand that each company that I select a plan from may have their own disclaimers or notices. It is my responsibility to read any disclaimers or notices that are provided by these companies.

I acknowledge that I have read and agree to the above Important Notices and Disclaimers

Back Save & Continue

## Notes & Documents Center

Employees can view any resources made available to them by their employer/administrator here

1. Select "Menu" from the top right of the screen
2. Hover over "Employee Information" and select "Notes/Documents Center"

