

Process Guide

January 2015

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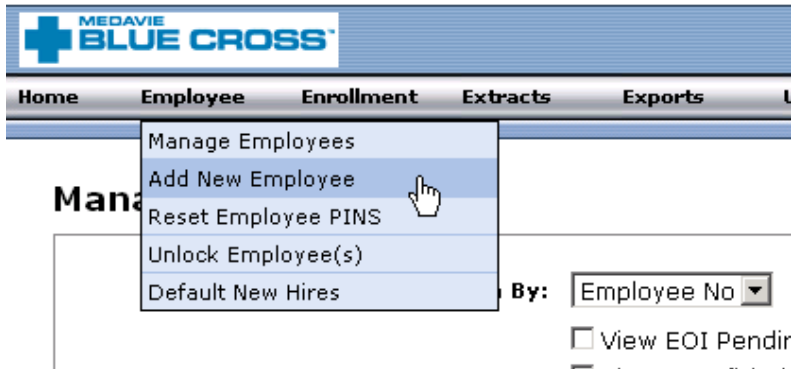
Disclaimer

While the user guide has been provided to you as a general step by step guide on how to complete certain updates, depending on your benefits and options available as well as processes required to be followed there may be additional steps required that are not included in this user guide. Please contact your Blue Cross Team for any questions or concerns or for further instructions specific to your Group.

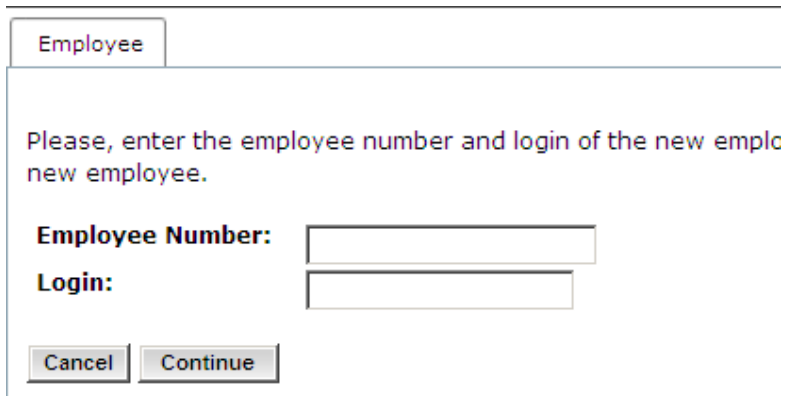
Note: When changes are being made through the administration website it is important that a recalculation is completed for each change to ensure that the changes will be applied. Please review the Confirmation statement after each change to ensure that the benefits are correct. If the changes are completed under the member website then the change is automatically applied.

Adding a New Enrollment

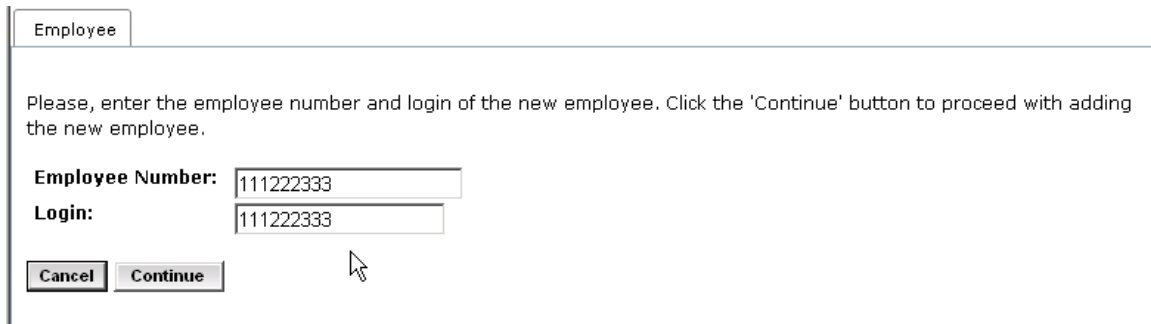
Click on Employee and select “Add new Employee” from the drop down.



The following screen will appear

A screenshot of the 'Employee' form. The form has a title bar 'Employee' and a message: 'Please, enter the employee number and login of the new employee.' Below the message are two input fields: 'Employee Number:' and 'Login:'. At the bottom of the form are two buttons: 'Cancel' and 'Continue'.

Note: Ensure that you follow the requirements set up for your group for the employee number and login

A screenshot of the 'Employee' form, similar to the previous one, but with the input fields filled. The 'Employee Number:' field contains '111222333' and the 'Login:' field also contains '111222333'. A mouse cursor is pointing at the 'Continue' button.

Click on Continue

Adding a New Enrollment

Enter the members personal Information, employee Information and dates to complete the enrolment.

Please fill in the fields below. Click Save once done.
Note: Fields marked with * are required

Personal Information (click to show) ←	
Employee Information (click to show) ←	
Dates (click to hide) ←	
Benefits Effective Date	MM/dd/yyyy
Enrollment Window	MM/dd/yyyy to MM/dd/yyyy *

Enter the member's personal information:

Items marked with an "*" are required fields

Please fill in the fields below. Click Save once done.
Note: Fields marked with * are required

Personal Information (click to hide)			
Last Name	Smith *	First Name	John *
Middle Initial			
Login	111222333		
Gender	Male *	Birth Date	01/01/1970 *
Language	English *		
Address	123 Main Street		
Address			
City		Province	Quebec *
Postal Code		Country	Canada
Work Email	<input type="radio"/>		
Personal Email	<input type="radio"/>		
Work Phone Number	- x		
Home Phone Number			
<input type="button" value="Cancel"/> <input type="button" value="Save"/>			

Adding a New Enrollment

Enter the Members Employee Information

Division - Select from the list available (these would be set up to be group specific)

Payroll Number - This is usually the same as the Employee number

Payroll, Cost Center and Location Code- Select from drop down list (these would be set up to be group specific)

Hire date for Eligibility - this is the effective date that the member is eligible for benefits with Medavie Blue Cross the day that benefits should start. (Month/Day/Year)

Earning Type - Select as per the requirements of the group

Earnings - Current Frozen Earnings, Current Earnings and Future Frozen Earnings should all indicate the same amount. These fields are mandatory for new employees. *(Ensure that you enter an annual salary if salary is selected)*

Original Hire Date - this will automatically be populated with the benefits effective date. This can be adjusted to the actual hire date.

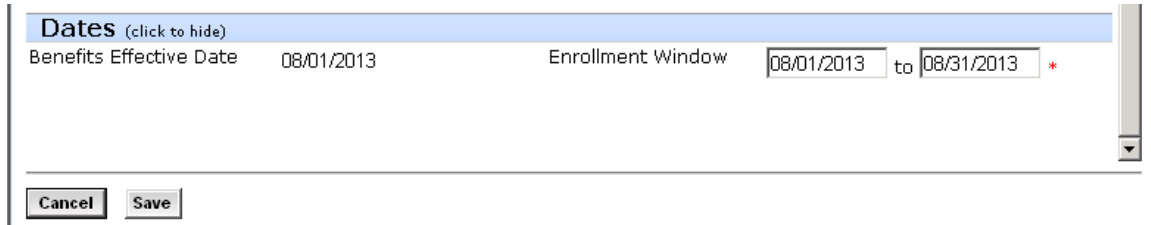
Please fill in the fields below. Click Save once done.
*Note: Fields marked with * are required*

Employee Information (click to hide)			
Employee No.	111222333	Payroll No	<input type="text"/>
Division	Leaders	Hire Date (for Eligibility)	MM/dd/yyyy
Payroll	ADP	Province of Employment	Select
Cost Center	Select	Vacation Days	<input type="text"/>
Location Code	Select		
Earning Type	Hourly		
If you selected 'Salary', please enter the annual amount into each Earnings field below. If you selected 'Hourly', please enter the hourly rate into each Earnings field. All amounts will be assigned the same earnings type.			
Current Frozen Earnings	<input type="text"/>	Future Frozen Earnings	<input type="text"/>
Current Earnings	<input type="text"/>	Fraction of Full Time	100 %
Client Specific Code	<input type="text"/>		
Original Hire Date	MM/dd/yyyy		

Adding a New Enrollment

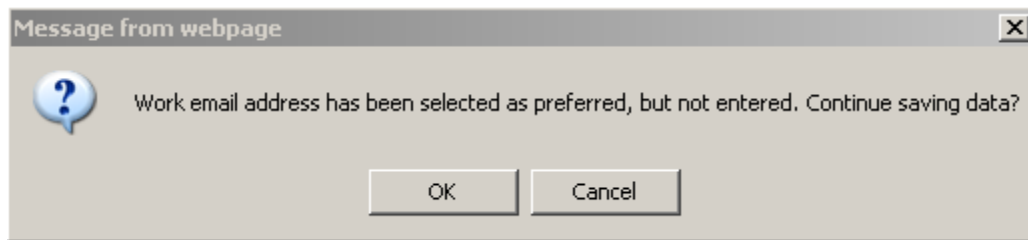
Go down to the Dates section and enter the Enrollment Window (Month/Day/Year)

Click on Save



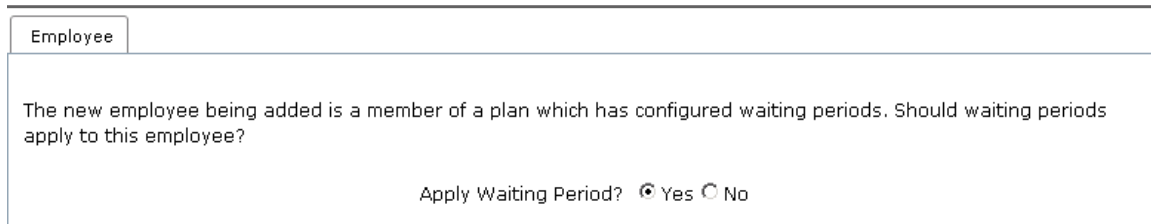
Dates (click to hide)
Benefits Effective Date 08/01/2013 Enrollment Window 08/01/2013 to 08/31/2013 *
Cancel Save

Once Save is selected a pop up will come up in regards to the Work Email if an email was not entered. Click on OK to continue with the enrolment.



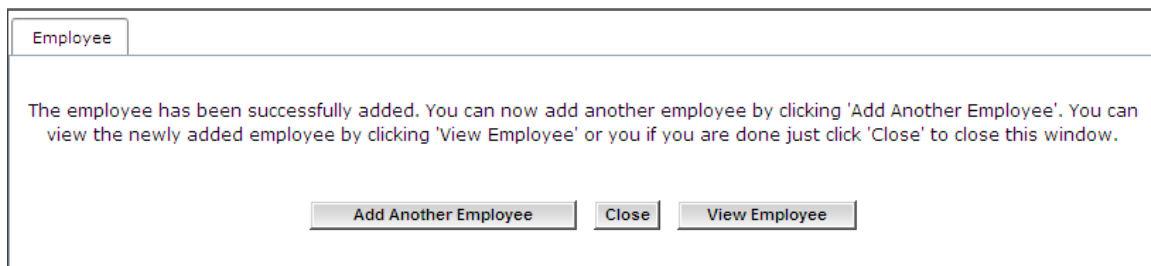
Message from webpage
Work email address has been selected as preferred, but not entered. Continue saving data?
OK Cancel

If your plan was set up to apply waiting periods an option will appear to advise if the waiting periods should be applied. Select “Yes” or “No” and click on save at the bottom of the page.



Employee
The new employee being added is a member of a plan which has configured waiting periods. Should waiting periods apply to this employee?
Apply Waiting Period? Yes No

Once when the member is added the following screen will appear.



Employee
The employee has been successfully added. You can now add another employee by clicking 'Add Another Employee'. You can view the newly added employee by clicking 'View Employee' or you if you are done just click 'Close' to close this window.
Add Another Employee Close View Employee

Click on View Employee

Adding a New Enrollment

Select the Employee Tab

Coverage	Employee	Dependents	Beneficiaries	Audits
111222333 John Smith				

Click on the “Assign PIN” on the Employee tab

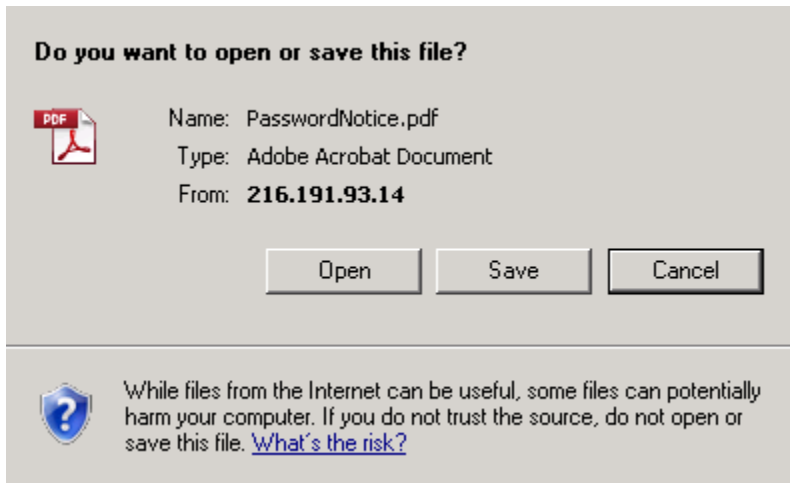
111222333 John Smith		Current Status: Active	Change Status
Personal Information (click to hide)			
Last Name	Smith	First Name	John
Middle Initial			
Login	111222333	Password	
Gender	Male	Birth Date	01/01/1970
Language	English		
Address	123 Main Street		

A pop up will come up with the below information
Click on “Assign”

Employee PIN			
Name	John Smith	Employee No.	111222333
Login	111222333		
You are about to assign a PIN to this employee. To generate a PIN for this employee select 'Assign'. The PIN notice will then need to be sent to this employee.			
		Cancel	Assign

Adding a New Enrollment

Another Pop up will come up that will allow you to open or save the PIN Letter.



Print or email the PIN letter to the employee so they can login and select their benefits.

Print a Confirmation Statement

Note: Whenever a change is made by a Group Administrator that impacts the Confirmation Statement data (benefits, dependents, and beneficiaries), the administrator should print and send a new Confirmation Statement to the employee or advise the member that a new confirmation statement is available.

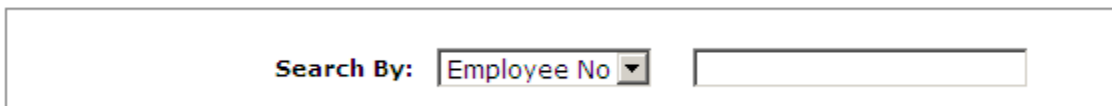
Go to the Employee Drop Down



Click on Manage Employees

Do a search by looking up the employee number or last name. Click on Search.

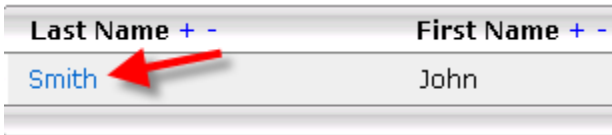
Manage Employees



The image shows a search interface with a 'Search By:' label, a dropdown menu currently set to 'Employee No', and an empty search input field. A red arrow points to the dropdown menu.

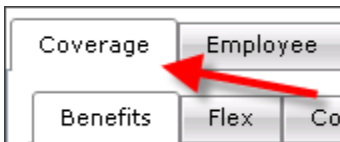
Log into the member by clicking on their name

Last Name + -	First Name + -
Smith	John



The image shows a table with two columns: 'Last Name + -' and 'First Name + -'. The first row contains the name 'Smith' under the last name column and 'John' under the first name column. A red arrow points to the name 'Smith'.

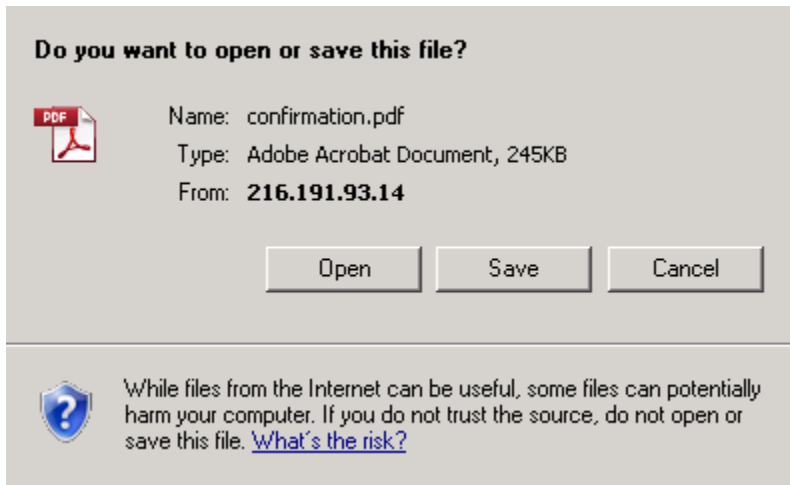
You will be on the coverage tab on the benefit page. Click on View Confirmation at the bottom of the page



The image shows two buttons at the bottom of the page: 'View Confirmation (English)' and 'View Confirmation (French)'. A red arrow points to the 'View Confirmation (English)' button. Above these buttons is a 'Next Year' button.

Print a Confirmation Statement

A pop up will appear. Click on open to view your Confirmation statement.



A PDF will appear. You can print or save the Confirmation Statement for the member.

Confirmation Statement



John Smith
Employee Id: 0023601

printed on September 5, 2013 01:48 PM at 1:48 PM E.T.

This is your confirmation of enrollment. For your reference, you can print this page. You will not receive a statement in the mail.

For information regarding health and dental claims or questions about specific services/expenses covered, please call Blue Cross Customer Service at 1-888-873-9200 or log on to the Blue Cross web site at www.medavie.bluecross.ca.

If you have a life event change, you may apply to change your health and dental coverage or dependent(s) provided you apply within 31 days of the life event or you may need to provide evidence of insurability.

Any salary increases during the plan year will not be reflected on the coverage amounts for LTD, Basic Life and Basic AD&D on the confirmation statement. However, if there are any claims, it will be based on current salary.

Your Flex Contribution

Benefit Flex Contribution	\$372
Company Flex \$	\$542
Total Flex Contribution	\$914

Your Benefits

Coverage effective from: September 5, 2013 to December 31, 2013

Print a Confirmation Statement - Login As

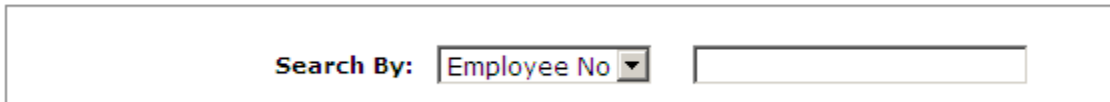
Go to the Employee Drop Down



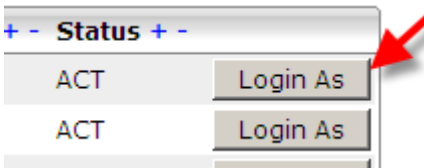
Click on Manage Employees

Do a search by looking up the employee number or last name. Click on Search.

Manage Employees

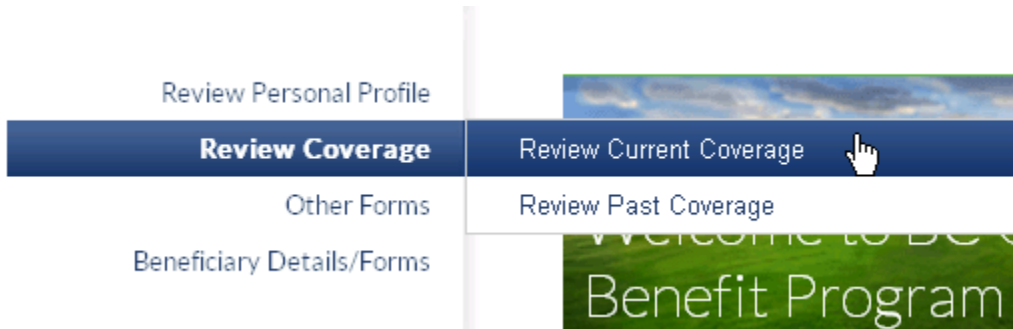


Click on "Login As" option for the member



Click on Review Coverage then select Review Current Coverage.

Note: If this is the first year your benefits have been active then you will only see the option "Review Current Coverage" as an option.



The Confirmation Statement will open up. Click on Print



Recalculating an Employee

Go to the Employee Drop Down



Click on Manage Employees

Do a search by looking up the employee number or last name. Click on Search.

Manage Employees

Search By:

Log into the member by clicking on their name

Last Name + -	First Name + -
Smith	John

Go to the coverage tab then the Recalculate tab and enter the effective date of the change and select the recalculate button

Coverage Employee Dependents Beneficiaries Audits Close

Benefits Flex Contributions Payroll Premium E01 Overrides Recalculate

Benefits recalculation for 10AD0

You are about to recalculate the employee's benefits for Current period. To perform recalculation, please, click "Recalculate" button.

Effective Date:

A confirmation page will appear. Click on Confirm at the bottom of the page

A pop up will come up to indicate that the recalculated coverage has been successful.

The recalculated coverage has been successfully saved. You can now return to Benefits Tab by clicking "Close".

The Recalculation will apply any reductions to the member's coverage that is required.

Modify Employee Personal Details

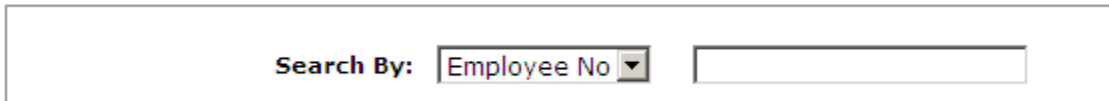
Go to the Employee Drop Down



Click on Manage Employees

Do a search by looking up the employee number or last name. Click on Search.

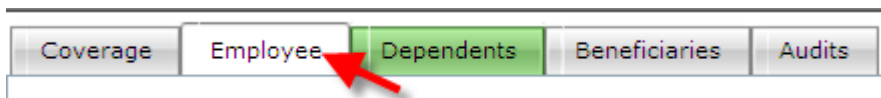
Manage Employees

The image shows a search interface with a 'Search By:' label. To its right is a dropdown menu currently set to 'Employee No' and an empty text input field for the search criteria.

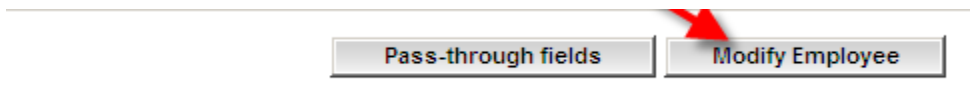
Log into the member by clicking on their name

Last Name + -	First Name + -
Smith	John

Go to the Employee Tab



Click on Modify Employee at the bottom of the screen



Make necessary updates

Enter a short description under “Reason for Change” ie. Name change

Click on “Save” at the bottom of the screen

Note: The Employee no. can't be changed.

Modify Employee Personal Details - Login As

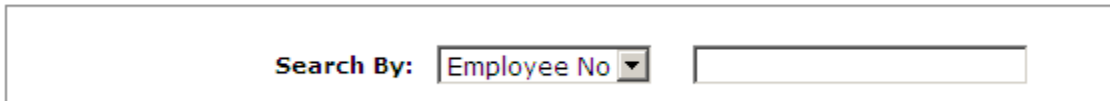
Go to the Employee Drop Down



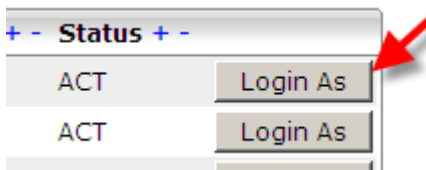
Click on Manage Employees

Do a search by looking up the employee number or last name. Click on Search.

Manage Employees

The image shows a search form with the text "Search By:" followed by a dropdown menu currently set to "Employee No" and an empty text input field to its right.

Click on "Login As" option for the member



Click on Review Personal Profile



Click on "Change"



Modify Employee Personal Details - Login As

Update personal information and click on save.

Note: Depending on your group set up and processes you may be restricted from updating certain personal details.

Modify Personal Profile

Address:

City:

Postal Code:

Country:

Personal Email:

Please select your preferred address for all email notifications: Personal Email Work Email

Home Phone Number:

Modify Employee Date of Birth

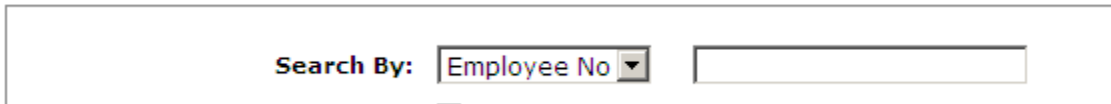
Go to the Employee Drop Down



Click on Manage Employees

Do a search by looking up the employee number or last name. Click on Search.

Manage Employees

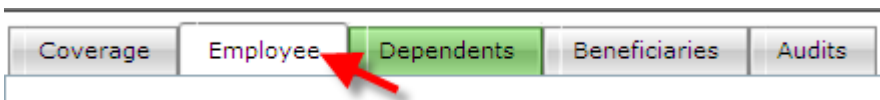


The image shows a search interface with a 'Search By:' label followed by a dropdown menu currently set to 'Employee No' and an adjacent empty text input field.

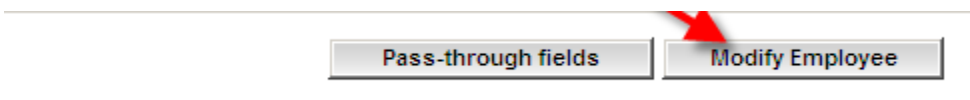
Log into the member by clicking on their name

Last Name + -	First Name + -
Smith	John

Go to the Employee Tab

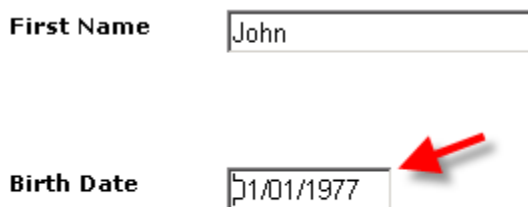


Click on Modify Employee at the bottom of the screen



Make update to members date of birth

Enter a short description under “Reason for Change” ie. Update birthday



The image shows a form with two fields: 'First Name' with the value 'John' and 'Birth Date' with the value '1/01/1977'. A red arrow points to the 'Birth Date' field.

Click on “Save” at the bottom of the screen



The image shows two buttons at the bottom of the form: 'Cancel' and 'Save'. A red arrow points to the 'Save' button.

Modify Employee Date of Birth

Go to the coverage tab. Click on the recalculate tab.

Enter the effective date of the change and select the recalculate tab



Coverage Employee Dependents Beneficiaries Audits **Close**

Benefits Flex Contributions Payroll Premium EOI Overrides Recalculate

Benefits recalculation for 0004793 John Smith

You are about to recalculate the employee's benefits for Current period. To perform recalculation, please, click "Recalculate" button.

Effective Date: 09/01/2013  **Recalculate**

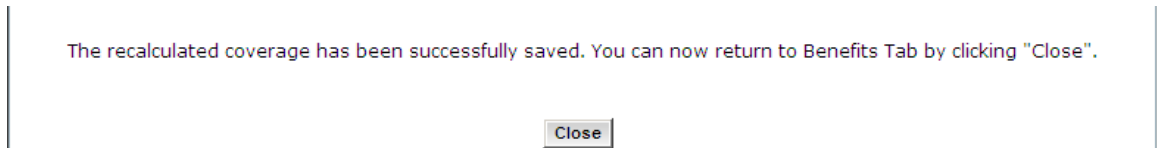
A Benefit Summary page will appear

Click on Confirm at the bottom of the page



Cancel **Confirm**

A pop up will come up to indicate that the recalculated coverage has been successful. Click on close.



The recalculated coverage has been successfully saved. You can now return to Benefits Tab by clicking "Close".

Close

You can now click on View Confirmation on the Benefits tab and print the confirmation statement for the employee.

Modify Dependent Personal Details

Go to the Employee Drop Down



Click on Manage Employees

Do a search by looking up the employee number or last name. Click on Search.

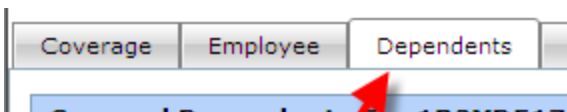
Manage Employees

Search By:

Log into the member by clicking on their name

Last Name + -	First Name + -
Smith	John

Go to the Dependent Tab



Click on the dependents name that you need to update information for

Covered Dependents For 0023601 John Smith	
Dependent Name	Birth Date
Jane Smith	04/22/1999
Jacy Smith	04/09/2002
Judy Smith	07/16/1961

Modify Dependent Personal Details

Make necessary changes to dependent information
Update the effective date of the change (if required)
Click on Save at the bottom of the page

Coverage Employee Dependents Beneficiaries AuditsClose

Edit Dependent

Please modify the fields you wish to change. When you are done press the "Save" button.

First Name	<input type="text" value="Jane-Elizabeth"/>	Last Name	<input type="text" value="Smith"/>
Initial	<input type="text"/>	Relationship	<input type="text" value="Child (under 21)"/>
Birth Date	<input type="text" value="08/01/2013"/>	Gender	<input type="text" value="Female"/>
Change Effective Date	<input type="text" value="08/01/2013"/>	Smoker Status	

Dependent Effective Date August 01, 2013

In the rare occurrence where an incorrect effective date was entered for a dependent, call Blue Cross for assistance.

The dependent update will now appear

Coverage Employee Dependents Beneficiaries AuditsClose

Covered Dependents For 0023601 John Smith

Dependent Name	Birth Date	Relationship	Gender	Status
Jane-Elizabeth Smith	08/01/2013	Child (under 21)	Female	<input type="button" value="Active"/>
Jacy Smith	04/09/2002	Child (under 21)	Female	<input type="button" value="Active"/>
Judy Smith	07/16/1961	Spouse	Female	<input type="button" value="Active"/>

Modify Current Beneficiary Information

Go to the Employee Drop Down



Click on Manage Employees

Do a search by looking up the employee number or last name. Click on Search.

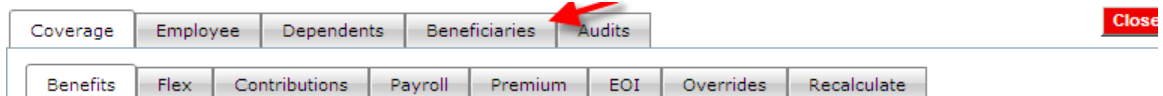
Manage Employees

Search By:

Log into the member by clicking on their name

Last Name + -	First Name + -
Smith	John

Go to the Beneficiaries tab




Click on Beneficiaries name



Modify Current Beneficiary Information

Update beneficiary details. ie date of birth
Click on Save

Beneficiary Is	<input checked="" type="radio"/> A person <input type="radio"/> An estate <input type="radio"/> A charity
First Name	<input type="text" value="Judy"/>
Last Name	<input type="text" value="Smith"/>
Initial	<input type="text"/>
Birth Date	<input type="text" value="11/01/1961"/> 
Relationship	<input type="text" value="Spouse"/>
Beneficiary Is	<input checked="" type="radio"/> Revocable <input type="radio"/> Irrevocable
Trustee	<input type="text" value="N/A"/>

Revocable: means that the designation of beneficiary can be changed without the beneficiary's consent.
Irrevocable: means that the designation of beneficiary CANNOT be changed without his or her consent.
The IRREVOCABLE designation of a minor cannot be changed until he or she reaches the age of majority.

Change a Beneficiary

Go to the Employee Drop Down



Click on Manage Employees

Do a search by looking up the employee number or last name. Click on Search.

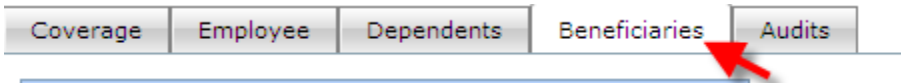
Manage Employees

Search By:

Log into the member by clicking on their name

Last Name + -	First Name + -
Smith	John

Go to the Beneficiaries Tab



Select Choose Beneficiaries

Employee Life Insurance
Name (On-File)
Jane Smith
Judy Smith
[Choose Beneficiaries](#)

Select Add Beneficiary Information



Change a Beneficiary

Add new beneficiary details and click on add

Press the 'Add' button once complete.

Beneficiary Is A person An estate A charity

First Name

Last Name

Initial

Birth Date

Relationship

Beneficiary Is Revocable Irrevocable

Trustee

Revocable: means that the designation of beneficiary can be changed without the beneficiary's consent.

Irrevocable: means that the designation of beneficiary CANNOT be changed without his or her consent.

The IRREVOCABLE designation of a minor cannot be changed until he or she reaches the age of majority.

Update Benefit % and click on save. Total must equal 100%.

Press the 'Save' button once complete.

Name	Relationship	Birth Date	Benefit %
Jane Smith	Daughter(Revocable)	01/01/2013	<input type="text" value="25"/>
Jim Smith	Parent(Revocable)	01/04/1943	<input type="text" value="25"/>
Judy Smith	Spouse(Revocable)	07/16/1961	<input type="text" value="50"/>
Total Percent			<input type="text" value="100"/>

Print the Beneficiary form and have the employee sign and date the form and return to you for processing.

Change a Beneficiary- Login As

Go to the Employee Drop Down



Click on Manage Employees

Do a search by looking up the employee number or last name. Click on Search.

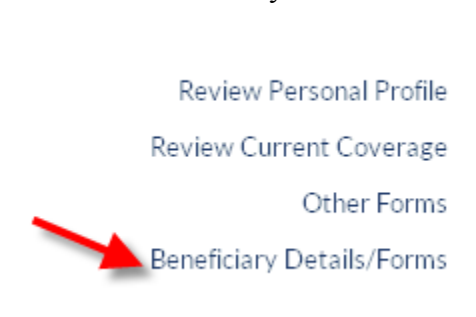
Manage Employees

Search By:

Click on “Login As” option for the member



Click on “Beneficiary Details/Forms”



Select Choose Beneficiaries

Your Beneficiaries

Employee Life Insurance

On-File Beneficiaries

Judy Smith - Spouse (Revocable)
D.O.B. 07/16/1961

100 %



Change a Beneficiary- Login As

Click on Add New Beneficiary

Employee Life Insurance
Choose Your Beneficiaries:

Beneficiary	Relationship	Birth Date	Percentage	
Judy Smith	Spouse (Revocable)	07/16/1961	100 %	
Total:			100 %	

Complete the new beneficiary details. Click on Add.

Please fill in the fields below for your new beneficiary. If designating a beneficiary who is a minor or who lacks legal capacity you may wish to appoint a trustee/administrator. This appointment may not be suitable for all purposes. Do not make a trustee appointment if you are in the province of Quebec because it does not apply for that province. Also, do not make a trustee appointment if you have already, in any document, made a trustee/administrator appointment which might apply. If you are designating a trustee/administrator, we recommend you consult with a legal advisor, and with any proposed trustee/administrator. Press the 'Add' button when complete.

Beneficiary Is: Person Estate Charity

First Name:

Initial:

Last Name:

Relationship:

Birth Date:

Trustee:





Adjust the Beneficiary amounts. Click on Save.

Basic Employee Life Insurance
Choose Your Beneficiaries:

Beneficiary	Relationship	Birth Date	Percentage	
Jane Smith	Daughter (Revocable)	07/16/1961	50 %	
Judy Smith	Spouse (Revocable)	01/01/2013	50 %	
Total:			100 %	

Change a Beneficiary- Login As

Print the Beneficiary form for the Employee to sign so changes can be confirmed on the administrator website.

Your Beneficiaries

Your beneficiary designation is not complete until your form is signed, dated and received

Beneficiary Form

 View/Print

View Outstanding Beneficiary Pending

Go to the Employee Drop Down



Click on Manage Employees

Under Manage Employees check off “View Beneficiaries Pending Only” and click on Search

Manage Employees

Search By: Employee No

View EOI Pending Only
 View Beneficiaries Pending Only
 View Incomplete Enrollments Only
 View Defaulted Enrollments Only
 View Completed Enrollments Not Transferred Only
 View with Waiting Benefits Only
 View New Hires Only

Status: Not terminated

A list of outstanding Beneficiaries will appear.

Note: Follow up with the employees as required. The beneficiary designation is not complete until the form is signed, dated and received by the group Administrator.

Confirm Pending Beneficiary for a Member

Once when the signed Beneficiary form is returned from the member then you must go into the admin site and confirm the beneficiary information.

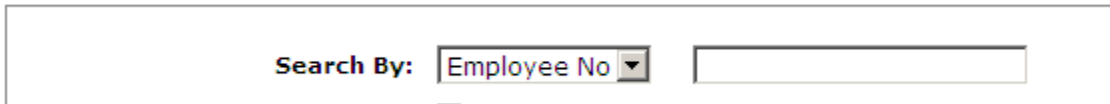
Go to the Employee Drop Down



Click on Manage Employees

Do a search by looking up the employee number or last name. Click on Search.

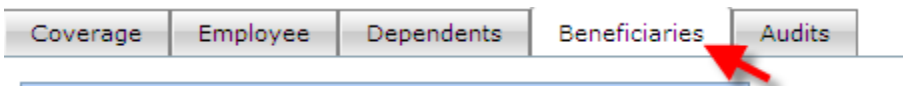
Manage Employees

A screenshot of the "Manage Employees" search interface. It features a "Search By:" label, a dropdown menu currently set to "Employee No", and an empty search input field to the right.

Log into the member by clicking on their name

Last Name + -	First Name + -
Smith	John

Go to the Beneficiaries Tab



Confirm Pending Beneficiary for a Member

Click on the Confirm Pending (this may need to be done for multiple benefits)

Pending (Until the Beneficiary Declaration is signed, dated and received)		
Jane Smith	01/01/2013	50%
Judy Smith	07/16/1961	50%

[Choose Beneficiaries](#) | [Confirm Pending](#) | [Delete Pending](#)

Put a check mark in the confirm box

Click on save at the bottom of the page.

Confirm Pending Beneficiaries				
You've chosen to confirm pending beneficiaries for the Employee Life Insurance Plan				
Name	Relationship	Birth Date	Benefit %	Confirm
Jane Smith	Daughter	01/01/2013	<input type="text" value="50"/> %	<input checked="" type="checkbox"/>
Judy Smith	Spouse	07/16/1961	<input type="text" value="50"/> %	<input checked="" type="checkbox"/>

Total Percent for Primary Beneficiaries: %

Go to the Coverage tab

Click on the benefits tab

Click on view Confirmation

Print the updated Confirmation Statement for the member with the new beneficiaries or advise the member to log in and print the updated statement from the member site.

View Outstanding EOI Pending

Go to the Employee Drop Down



Click on Manage Employees

Under Manage Employees check off “View EOI Pending Only” and click on Search

Manage Employees

Search By: Employee No

View EOI Pending Only
 View Beneficiaries Pending Only
 View Incomplete Enrollments Only
 View Defaulted Enrollments Only
 View Completed Enrollments Not Transferred Only
 View with Waiting Benefits Only
 View New Hires Only

Status: Not terminated

A list of outstanding EOI's will appear.

Confirm Pending EOI for a Member

Once when a decision from medical underwriting is made a copy of the letter will be sent to the Group Administrator. Once this is received you must go into the system to remove the pending on the outstanding EOI.

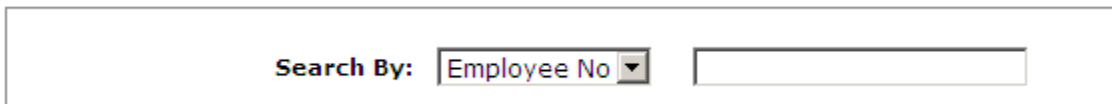
Go to the Employee Drop Down



Click on Manage Employees

Do a search by looking up the employee number or last name. Click on Search.

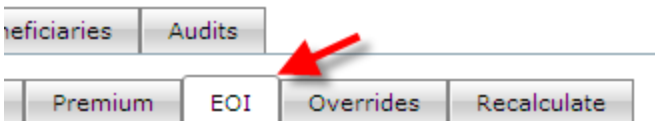
Manage Employees

The image shows a search form with the title 'Manage Employees'. It includes a 'Search By:' dropdown menu currently set to 'Employee No', followed by an empty text input field. A red arrow points to the dropdown menu.

Log into the member by clicking on their name

Last Name + -	First Name + -
Smith	John

Go to the EOI Tab



Confirm Pending EOI for a Member

Check that the EOI was received Change the EOI approval status from pending to approved or rejected and enter the effective date that was indicated on the letter.

Click on update at the bottom of the page.

Benefit	Assigned Coverage	Pending Coverage	EOI Form Received	Date Received	EOI Approval Status	Status Date
Optional Life	Option 1 \$0	Option 3 \$37,000	<input checked="" type="checkbox"/>		Approved	11/01/2012

[Print Cover Letter - English](#)

[Print Questionnaire - English](#)

[Update](#) [Next Year](#)

Go to the Benefits tab

Click on View Confirmation

Print the updated Confirmation Statement for the member or advise the member to login and print the updated statement from the member site.

Reset an Employee's PIN

Go to the Employee Drop Down



Click on Manage Employees

Do a search by looking up the employee number or last name. Click on Search.

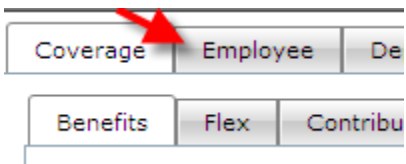
Manage Employees

Search By:

Log into the member by clicking on their name

Last Name + -	First Name + -
Smith	John

Go to the Employee Tab



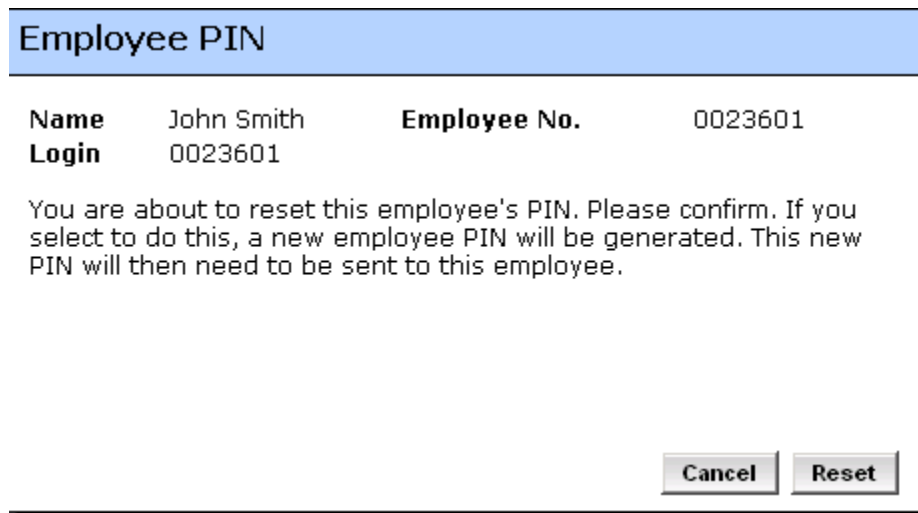
Click on "Reset PIN" on the Employee tab

Password

Reset PIN

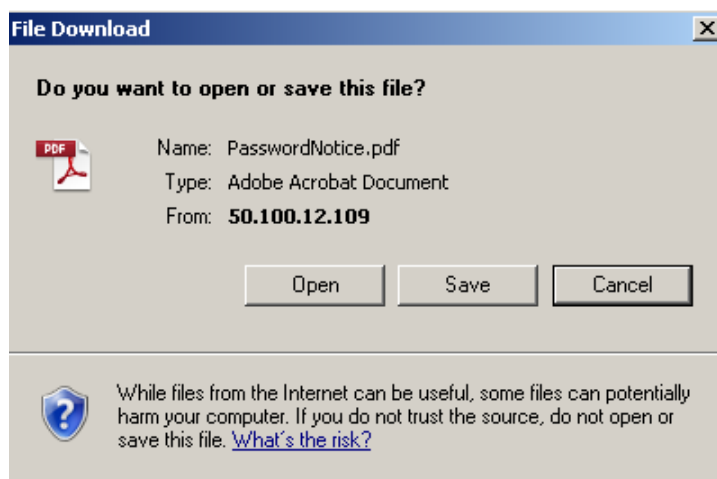
Reset an Employee's PIN

The following pop up message will appear



Click on "Reset"

A second pop up message will appear you can open or save the document



Save and email the PDF out to the member or print the PDF and provide to the member.

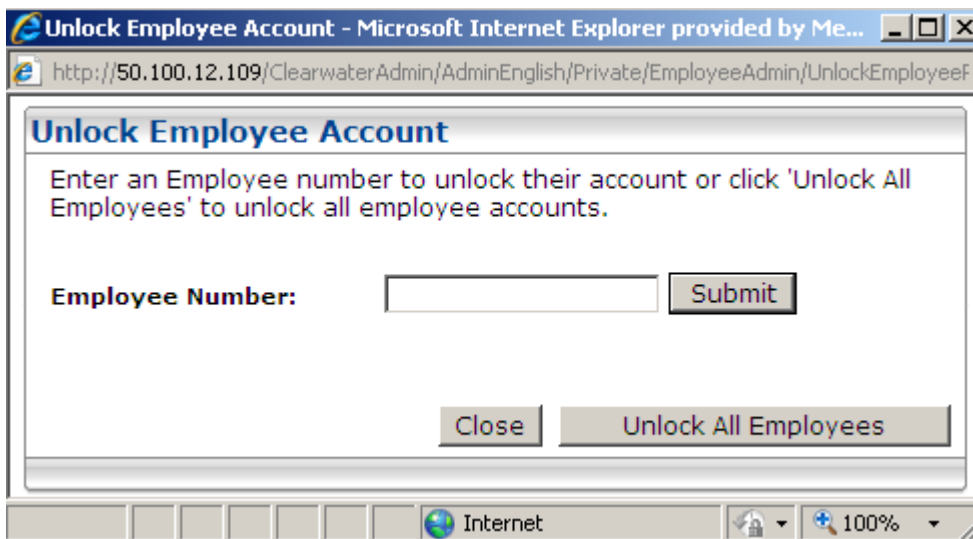
Unlock an Employee's PIN

Go to the Employee Drop Down



Click on Unlock Employee(s)

Enter Employee Number for employee that needs to be unlocked and click on submit (or select Unlock All Employees Option)

A screenshot of a web browser window titled "Unlock Employee Account - Microsoft Internet Explorer provided by Me...". The address bar shows "http://50.100.12.109/ClearwaterAdmin/AdminEnglish/Private/EmployeeAdmin/UnlockEmployeeF". The main content area has the heading "Unlock Employee Account" and the text "Enter an Employee number to unlock their account or click 'Unlock All Employees' to unlock all employee accounts." Below this is a form with the label "Employee Number:" followed by a text input field and a "Submit" button. At the bottom of the form are two buttons: "Close" and "Unlock All Employees". The browser's status bar at the bottom shows "Internet" and "100%".

Terminate an Employee

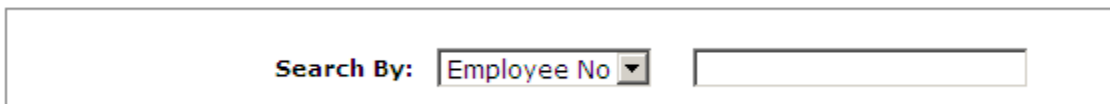
Go to the Employee Drop Down



Click on Manage Employees

Do a search by looking up the employee number or last name. Click on Search.

Manage Employees

The image shows a search form within the 'Manage Employees' section. It includes a 'Search By:' label, a dropdown menu currently set to 'Employee No', and an empty text input field for the search criteria.

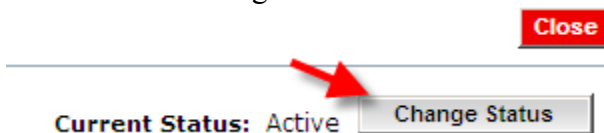
Log into the member by clicking on their name

Last Name + -	First Name + -
Smith	John

Go to the Employee tab



Click on the "Change Status" button



Terminate an Employee

Select “Terminated” from the drop down list

Current Status Active

Change Status To Terminated

Effective Date

- Select
- Inactive
- Terminated**
- Leave of Absence
- Long Term Disability
- Short Term Disability
- Maternity/Parental Leave
- Retirement
- Death
- Terminated with Benefits
- Leave with Benefits
- Ineligible
- Expatriate
- Layoff
- Strike
- Temporary
- Active Disabled
- Terminated with Benefits - LTD
- Terminated with Benefits - LTD/Life
- WCB

Cancel Change Status Keep Status

Enter the effective date (this will be the actual date in which you want benefits to be terminated)

Current Status Active

Change Status To Terminated

Effective Date 11/01/2012

Select the “Change Status” button

Cancel Change Status Keep Status

You will return back to the Employee tab and the status will now have changed to terminated.

Re-activate an Employee

Go to the Employee Drop Down



Click on Manage Employees

Do a search by looking up the employee number or last name

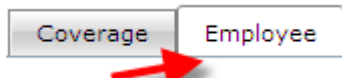
Manage Employees

Search By:

Log into the member by clicking on their name

Last Name + -	First Name + -
Smith	John

Go to the Employee Tab



Click on the Change Status button

Current Status: Terminated

Re-activate an Employee

Change the Status to Active and enter an effective date

Click on Change status at the bottom of the page.

Current Status Terminated
Change Status To Active
Effective Date 11/15/2012

Cancel Change Status Keep Status

Depending on when the member was termed (current or previous plan years) there are a few different screens that may appear.

Option 1:

The “Change Employee Status” page will appear
Change the Status under action to “Activate” for all benefits required
Ensure correct effective date for each benefit being activated is correct
Click on Save at the bottom of the page

Change Employee Status

Please select what you wish to do with this employee's coverage

Benefit	Status	Action	Effective Date
Health	Terminated	Activate	11/29/2012
Dental	Terminated	Activate	11/29/2012
Basic Life (Employee share only)	Terminated	Activate	11/29/2012
Dependent Life (Employee share only)	Terminated	Activate	11/29/2012
Optional AD&D	Terminated	Activate	11/29/2012
Optional Life	Terminated	Activate	11/29/2012
STD (Employee share only)	Terminated	Activate	11/29/2012
LTD (Employee share only)	Terminated	Activate	11/29/2012

Cancel Back Save

Once this is saved you can skip down to the Recalculate Employee section.

Re-activate an Employee

Option 2:

If the benefits have not been active since the previous plan year then you will be presented a blank screen. Click on save at the bottom of the page.

Change Employee Status

Change Employee Status

Please select what you wish to do with this employee's coverage

Benefit	Status	Action	Effective Date
---------	--------	--------	----------------

Cancel Back Save

On the employee tab click on Modify employee

Pass-through fields **Modify Employee**

Update any information that needs to be updated:

Update the effective date in the Hire date (for eligibility) field with the members new benefits effective date.

Salary information- make sure all three salary fields are updated

Hire Date (for Eligibility)

11/29/2013

Re-activate an Employee

At the bottom of the page enter the effective date and reason for the change and click on save.

Current Indicative Data Effective Date	11/25/2013
New Indicative Data Effective Date	<input type="text" value="11/25/2013"/>
Reason For Change	<input type="text" value="re-hired employee"/>

Ensure all other member details are correct ie. Dependent details

If waiting periods are applicable on the employee page you will need to check the Apply Waiting Period status and modify as required. To update click on Modify Waiting button and change the waiting period to Yes or No and enter change reason and save.

Future Frozen Earnings	\$25,571.00
Fraction of Full Time	100 %
Years In System	0
Apply Waiting Period	Yes



Go to the Coverage - Benefits tab. You should see a Click here option. Click on this button. This will bring back a list of benefits.

Coverage

Current benefit selections for

Note: This employee is missing subscriptions for the following benefits: Health Care, Dental Care, Optional Employee Life Insurance, Spousal Life Insurance, Employee AD&D Insurance, Short Term Disability, Long Term Disability, Optional Single or Family AD&D, Basic Employee Life Insurance. to add subscriptions for the missing benefits.

Coverage Dates: November 29, 2013 - October 31, 2014

Employee has no active subscriptions

View Previous Coverage:

Re-activate an Employee

At the bottom of the page select the Modify System dates button.

Coverage
Employee
Dependents
Beneficiaries
Audits
Close

Benefits
Flex
Contributions
Payroll
Premium
EOI
Overrides
Recalculate

Current benefit selections for

Note: This employee has blank subscriptions for the following benefits: Health Care, Dental Care, Basic Employee Life Insurance, Optional Employee Life Insurance, Spousal Life Insurance, Employee AD&D Insurance, Short Term Disability, Long Term Disability, Optional Single or Family AD&D. Please select options for these benefits or [Click Here](#) to remove the blank subscriptions.

Coverage Dates: November 29, 2013 - October 31, 2014 [Modify Benefits](#)

Benefit	Option	Category	Annual Price Tag	Annual Flex \$ Spent	Payroll Deductions Annual	Payroll Deductions Per pay
Health Care	-	-	\$0	\$0	\$0	\$0.00
Dental Care	-	-	\$0	\$0	\$0	\$0.00
Basic Employee Life Insurance	-	-	\$0	\$0	\$0	\$0.00
Employee AD&D Insurance	-	-	\$0	\$0	\$0	\$0.00
Optional Employee Life Insurance	-	-	\$0	\$0	\$0	\$0.00
Spousal Life Insurance	-	-	\$0	\$0	\$0	\$0.00
Optional Single or Family AD&D	-	-	\$0	\$0	\$0	\$0.00
Short Term Disability	-	-	\$0	\$0	\$0	\$0.00

View Previous Coverage: Select [Next Year](#)

[View Confirmation \(English\)](#)
[View Confirmation \(French\)](#)

[Modify System Dates](#)
➔

Ensure that the Effective date for benefits is correct. Enter new effective date for the benefits as required.

Modify System Dates - Microsoft Internet Explorer provided by Medavie - Blue Cross
Close

Modify Benefit Effective Dates
Modify Employee Record Dates

Benefit	Status	Effective Date	New Effective Date
Health Care	Active	11/29/2013	<input type="text" value="MM/dd/yyyy"/>
Dental Care	Active	11/29/2013	<input type="text" value="MM/dd/yyyy"/>
Basic Employee Life Insurance	Active	11/29/2013	<input type="text" value="MM/dd/yyyy"/>
Employee AD&D Insurance	Active	11/29/2013	<input type="text" value="MM/dd/yyyy"/>
Optional Employee Life Insurance	Active	11/29/2013	<input type="text" value="MM/dd/yyyy"/>
Spousal Life Insurance	Active	11/29/2013	<input type="text" value="MM/dd/yyyy"/>
Optional Single or Family AD&D	Active	11/29/2013	<input type="text" value="MM/dd/yyyy"/>
Short Term Disability	Active	11/29/2013	<input type="text" value="MM/dd/yyyy"/>
Long Term Disability	Active	11/29/2013	<input type="text" value="MM/dd/yyyy"/>

If you change any dates, you are overriding the system calculated dates. Past and/or subsequent transactions may be incorrect if these dates are adjusted. If any adjustments are needed based on changing the dates, they must be calculated and entered manually.

Cancel
Save

Re-activate an Employee

Click on the Modify Employee Record Dates tab. Update the Benefits Effective date to the same date. Click on Save.

Name	Current Date	New Date
Benefits Effective Date	11/01/2012	11/25/2013
Date Last Changed	11/29/2013	MM/dd/yyyy
Status Change Date	11/29/2013	MM/dd/yyyy
Critical Change Date	11/29/2013	MM/dd/yyyy
Original Effective Date	11/01/2011	MM/dd/yyyy
Benefits Continuance End Date		MM/dd/yyyy

Note: If you change any dates, you are overriding the system calculated dates. Past and/or subsequent transactions may be incorrect if these dates are adjusted. If any adjustments are needed based on changing the dates, they must be calculated and entered manually.

Cancel Save


Note: Once you return to the Coverage Benefits tab if there is still an option to Click here then an extra step is required for this member. Click on the Modify Benefits tab.

If any benefits need to be adjusted then you would click on the Modify benefits tab and go through each tab to update the benefits.


Note: This employee has blank subscriptions for the following benefits: Health Care, Dental Care, Basic Employee Life Insurance, Optional Employee Life Insurance, Spousal Life Insurance, Employee AD&D Insurance, Short Term Disability, Long Term Disability, Optional Single or Family AD&D. Please select options for these benefits or

[Click Here](#) to remove the blank subscriptions.

Coverage Dates: December 3, 2013 - October 31, 2014

 [Modify Benefits](#)

On the Modify Benefits tab at the bottom of the page enter the new effective date and click on Save all. This will refresh the benefits and update any changes just completed.

Effective date of the benefit changes: 12/03/2013 

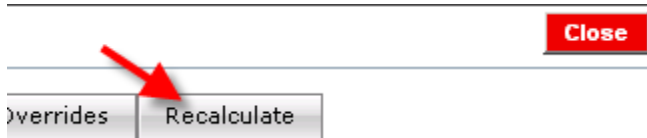
Cancel All Help Save All

This will bring a page up with a list of all the benefits updated. Click on Close

Re-activate an Employee

Recalculate Employee

Go to the Coverage tab. Click on the Recalculate tab



Enter the effective date of the change and click on the Recalculate button.

You are about to recalculate the employee's benefits for Current period. To perform recalculation, please, click "Recalculate" button.



A Benefit summary page will appear.

Click on confirm on the next screen and then close. The benefits \$ amounts will now be updated.



A pop up will come up to indicate that the recalculated coverage has been successful. Click on Close.

You can now click on the View Confirmation on the Benefits tab and print the confirmation statement for the employee.

The member will now be reinstated. You are unable to open the enrolment window in order for the member to make any changes they will need to wait until the following day and do a life event to change dependents, beneficiaries etc.

Terminate a Benefit

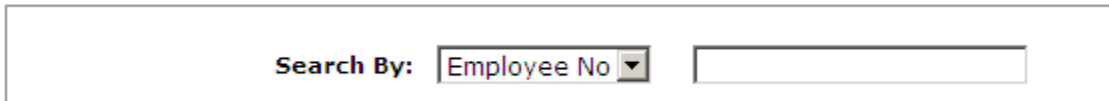
Go to the Employee Drop Down



Click on Manage Employees

Do a search by looking up the employee number or last name. Click on Search.

Manage Employees



The image shows a search interface with a 'Search By:' label, a dropdown menu currently set to 'Employee No', and an empty text input field to the right.

Log into the member by clicking on their name

Last Name + -	First Name + -
Smith	John

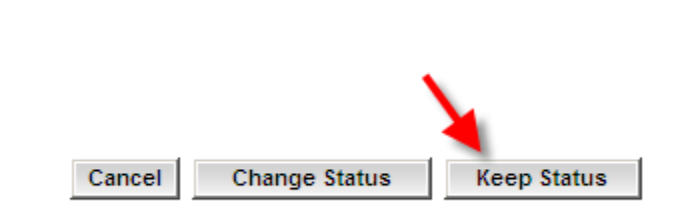
Go to the Employee tab



Click on the Change Status button



Click on the "Keep Status" button



Terminate a Benefit

Change the “Action” to Terminated for each benefit you wish to terminate (Member must have at least one benefit active)

Change the effective date for each Benefit being terminated

Change Employee Status

Please select what you wish to do with this employee's coverage

Benefit	Status	Action	Effective Date
Health	Active	Terminate	11/15/2012
Dental	Active	Terminate	11/15/2012
Basic Life (Employee share only)	Active	No Action	11/28/2012
Dependent Life (Employee share only)	Active	No Action	11/28/2012

Click on save at the bottom of the page. The benefits will now have been removed.

You can now click on the View Confirmation on the Benefits tab and print the confirmation statement for the employee or advise the employee to log in and print the updated confirmation statement.

Re-Activate a Benefit

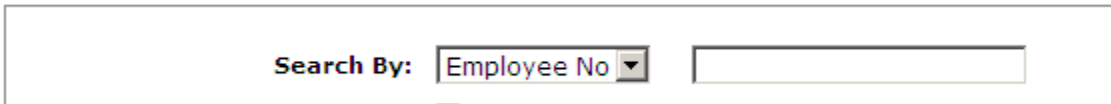
Go to the Employee Drop Down



Click on Manage Employees

Do a search by looking up the employee number or last name. Click on Search.

Manage Employees

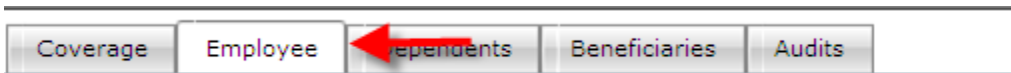


The image shows a search interface with a 'Search By:' label. A dropdown menu is open, showing 'Employee No' as the selected option. To the right of the dropdown is an empty text input field for entering search criteria.

Log into the member by clicking on their name

Last Name + -	First Name + -
Smith	John

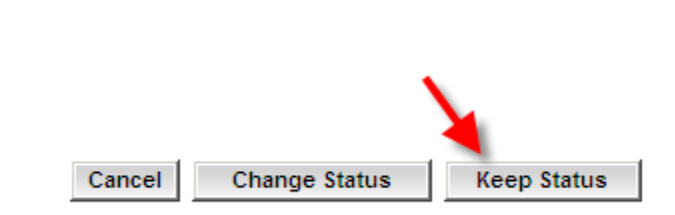
Go to the Employee tab



Click on the Change Status button



Click on the "Keep Status" button



Re-Activate a Benefit

Change the “Action” to Activate for each benefit you need to activate

Change the effective date

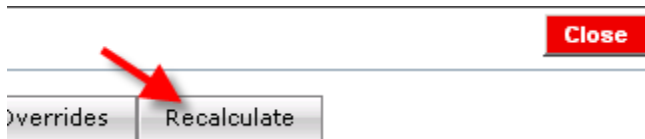
Change Employee Status

Please select what you wish to do with this employee's coverage

Benefit	Status	Action	Effective Date
Health	Terminated	Activate	11/16/2012
Dental	Terminated	Activate	11/16/2012
Basic Life (Employee share only)	Active	No Action	11/28/2012
Dependent Life (Employee share only)	Active	No Action	11/28/2012

Click on save at the bottom of the page

Go to the Coverage tab. Click on the Recalculate tab



Enter the effective date of the change and click on the Recalculate button.

You are about to recalculate the employee's benefits for Current period. To perform recalculation, please, click "Recalculate" button.

Effective Date: 

A Benefit summary page will appear.

Click on confirm on the next screen and then close. The benefits \$ amounts will now be updated.



A pop up will come up to indicate that the recalculated coverage has been successful. Click on Close.

You can now click on the View Confirmation on the Benefits tab and print the confirmation statement for the employee.

Adding Waiver of Premium to a Member

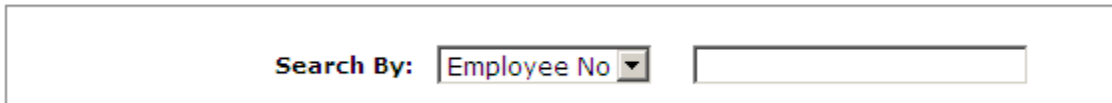
Go to the Employee Drop Down



Click on Manage Employees

Do a search by looking up the employee number or last name. Click on Search.

Manage Employees

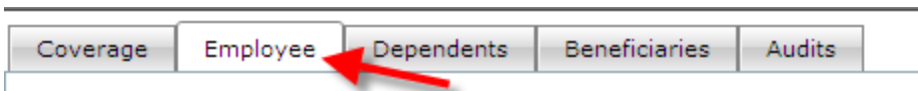


The image shows a search interface for managing employees. It includes a 'Search By:' label, a dropdown menu currently set to 'Employee No', and an adjacent empty text input field for the search criteria.

Log into the member by clicking on their name

Last Name + -	First Name + -
Smith	John

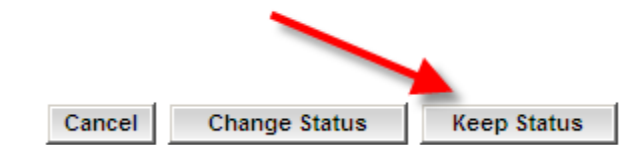
Go to the Employee tab



Click on Change status button



Click on Keep status at the bottom of the page



Adding Waiver of Premium to a Member

Change the “No Action” to the “Waive Premium” option for all required benefits.
Change the effective date.

Optional AD&D	Active	No Action	01/29/2015
Optional Life	Active	No Action	01/29/2015
STD (Employee share only)	Active	No Action	01/29/2015
LTD (Employee share only)	Active	Waive Premium	01/01/2015



Click on save at the bottom of the page

Click on the Coverage tab

Go to the Benefits tab

Click on View Confirmation

Print the updated Confirmation Statement for the member.

Removing Waiver of Premium for a Member

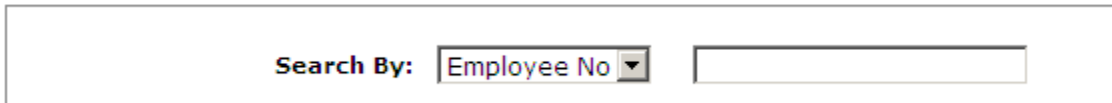
Go to the Employee Drop Down



Click on Manage Employees

Do a search by looking up the employee number or last name. Click on Search.

Manage Employees

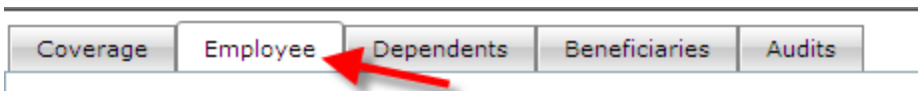


The image shows a search interface for managing employees. It includes a 'Search By:' label followed by a dropdown menu currently set to 'Employee No' and an adjacent empty text input field. A red arrow points to the dropdown menu.

Log into the member by clicking on their name

Last Name + -	First Name + -
Smith	John

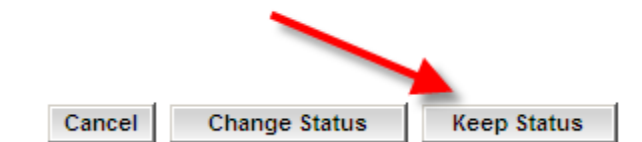
Go to the Employee tab



Click on Change status button



Click on Keep status at the bottom of the page




Removing Waiver of Premium for a Member

Change the “No Action” to the “Activate” option for all required benefits.
Change the effective date.

Change Employee Status

Change Employee Status

Please select what you wish to do with this employee's coverage

Benefit	Status	Action	Effective Date
Long Term Disability	Waived Premium	Activate 	02/05/2013
Health Benefits	Active	No Action	02/05/2013

Click on save at the bottom of the page

Click on the Coverage tab

Go to the Benefits tab

Click on View Confirmation

Print the updated Confirmation Statement for the member.

Terminating a Dependent

Note: Mid plan year there may be students who have reached the maximum student age. These dependents must be terminated from the system in order for them to be removed from the file. Claims will no longer pay once the maximum age is reached.

Go to the Employee Drop Down



Click on Manage Employees

Do a search by looking up the employee number or last name. Click on Search

Manage Employees

Search By:

Log into the member by clicking on their name

Last Name + -	First Name + -
Smith	John

Click on the Dependents Tab

Click on the Status "Active" for the dependent that should no longer be covered.

Covered Dependents For 0023601 John Smith				
Dependent Name	Birth Date	Relationship	Gender	Status
Jane-Elizabeth Smith	08/01/2013	Child (under 21)	Female	Active
Jacy Smith	04/09/2002	Child (under 21)	Female	Active
Judy Smith	07/16/1961	Spouse	Female	Active

Terminating a Dependent

Enter the effective date that you want the dependent status changed. Click on OK.

Confirmation

Changing a dependent's status from Active to Inactive terminates all benefits for the dependent. Do you want to continue?

If you are ok with this change please specify the effective date.

Effective Date

A message will come up to say the system is recalculating the dependent.

Click on "Continue" when the below pop up box appears.

Recalculation complete. Please press 'Continue' to return to application.

The dependent will now appear inactive on the dependents tab.

Covered Dependents For 0023601 John Smith				
Dependent Name	Birth Date	Relationship	Gender	Status
Jane-Elizabeth Smith	08/01/2013	Child (under 21)	Female	<input type="button" value="Inactive"/>
Jacy Smith	04/09/2002	Child (under 21)	Female	<input type="button" value="Active"/>
Judy Smith	07/16/1961	Spouse	Female	<input type="button" value="Active"/>

Re-activating a Dependent

Go to the Employee Drop Down



Click on Manage Employees

Do a search by looking up the employee number or last name. Click on Search

Manage Employees

Search By:

Log into the member by clicking on their name

Last Name + -	First Name + -
Smith	John

Click on the Dependents Tab

Click on the Status “Inactive” for the dependent that should now be covered.

Covered Dependents For 0023601 John Smith				
Dependent Name	Birth Date	Relationship	Gender	Status
Jane-Elizabeth Smith	08/01/2013	Child (under 21)	Female	Inactive
Jacy Smith	04/09/2002	Child (under 21)	Female	Active
Judy Smith	07/16/1961	Spouse	Female	Active

Enter the effective date that you want the dependent status changed. Click on OK.

Confirmation

Changing a dependent's status from Active to Inactive terminates all benefits for the dependent. Do you want to continue?

If you are ok with this change please specify the effective date.

Effective Date

Re-Activating a Dependent

The dependent will now appear active on the dependents tab.

Covered Dependents For 0023601 John Smith

Dependent Name	Birth Date	Relationship	Gender	Status
Jane-Elizabeth Smith	08/01/2013	Child (under 21)	Female	<input type="button" value="Active"/>
Jacy Smith	04/09/2002	Child (under 21)	Female	<input type="button" value="Active"/>
Judy Smith	07/16/1961	Spouse	Female	<input type="button" value="Active"/>

Terminating a Dependent - Login As

Go to the Employee Drop Down



Click on Manage Employees

Do a search by looking up the employee number or last name. Click on Search.

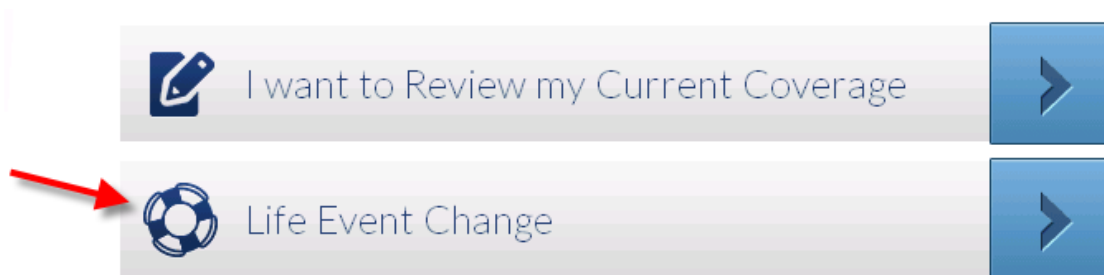
Manage Employees

Search By:

Click on "Login As" option for the member

Status + -	DivId + -	
ACT	6	Login As


Select Life Event Change which is located at the bottom of the page.



Terminating a Dependent - Login As

Enter the effective date of the life event change. Select the reason for the Life Event change (Choose the one that best indicates the change you will be making)

Note: Depending on your set up for your group the below options may vary.

Date of Life Event Change: 

- Marriage or eligibility of your common-law spouse
- Separation or divorce
- Birth or adoption of a child
- Death of your spouse or of the last dependent child
- Loss of a child, or a child becomes/is no longer eligible for coverage
- Involuntarily loss or gain access to coverage under your spouse's plan

Click on Next


A disclaimer will appear. Click "I Agree"

Disclaimer

Your employer may require you to pr

Benefits plans must be administered coverage during the year only if you child or marriage.

By completing this change, you certif information that you are about to pr falsification or material omission of ir employment.



Click on Next on the personal details page



Terminating a Dependent - Login As

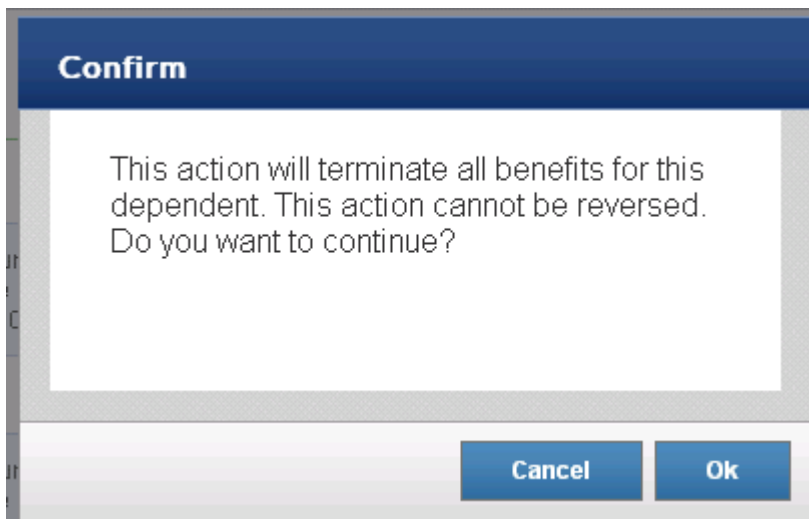
On the Dependent page click on the Trash can to delete the dependent. **Note:** This will permanently remove the dependent from the members file.

Life Event Change

Jane-Elizabeth Smith

Relationship: Child (under 21)	Covered Under Other Plan: No		
Gender: Female			
Birth Date: 08/01/2013			

A pop up will appear click on OK.



The dependent will now be removed from the file.

Life Event Change

You have no dependents on file

[+ Add New Dependent](#)

Click on Next until you reach the last page which is the Enrollment Summary page



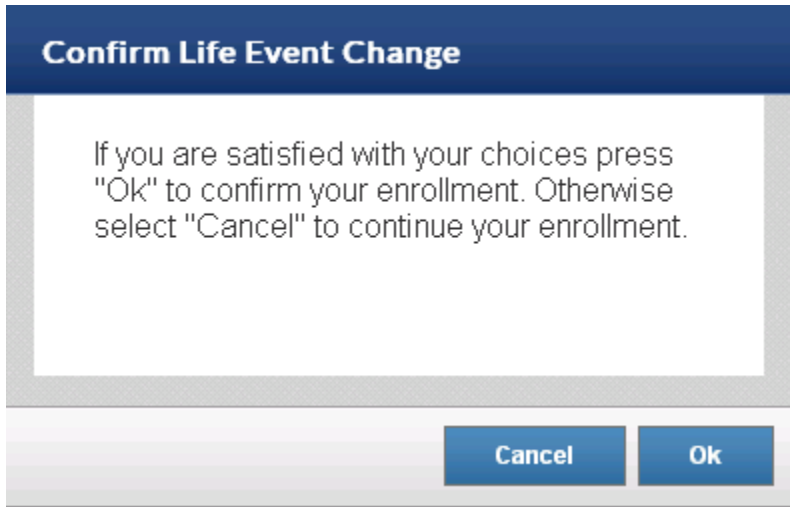
Note: If you are removing all dependents ensure that the benefits are changed to Single coverage on the Benefits pages.

Terminating a Dependent - Login As

Click on Confirm once you reach the Enrollment Summary page.



A pop up will appear click on OK if the life event has been completed.

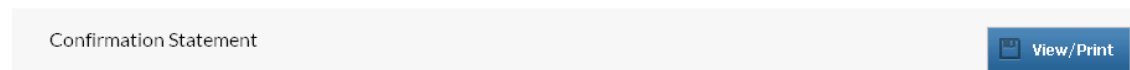


Your change is now complete. A new confirmation statement will be available to view or print.

Enrollment Process is Now Complete

Thank you, **John Smith**.

Your enrollment process is now complete! Your selections have been confirmed and submitted.



Adding a Dependent - Login As

Go to the Employee Drop Down



Click on Manage Employees

Do a search by looking up the employee number or last name. Click on Search.

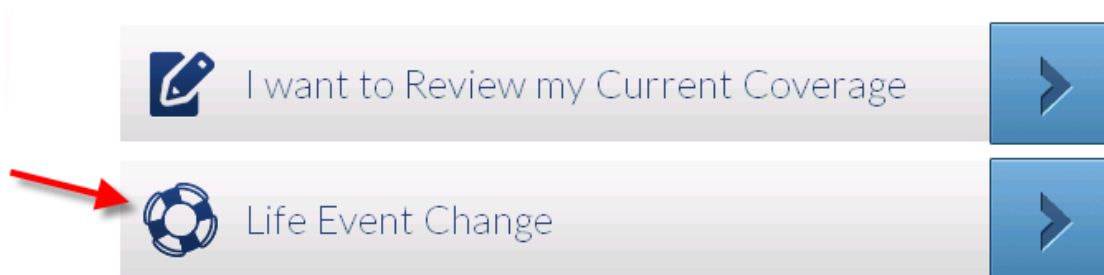
Manage Employees

Search By:

Click on "Login As" option for the member

Status + -	DivId + -	
ACT	6	Login As

Select Life Event Change which is located at the bottom of the page.




Adding a Dependent - Login As

Enter the effective date of the life event change. Select the reason for the Life Event change (Choose the one that best indicates the change you will be making)

Note: Depending on your set up for your group the below options may vary.

Enter the date and type of change

Date of Life Event Change: 

Marriage or eligibility of your common-law spouse

Separation or divorce

Birth or adoption of a child

Death of your spouse or of the last dependent child

Loss of a child, or a child becomes/is no longer eligible for coverage

Involuntarily loss or gain access to coverage under your spouse's plan

Click on Next


A disclaimer will appear. Click "I Agree"

Disclaimer

Your employer may require you to pr

Benefits plans must be administered coverage during the year only if you child or marriage.

By completing this change, you certif information that you are about to pr falsification or material omission of ir employment.



Click on Next on the skip the personal details page



Adding a Dependent - Login As

Click on “Add New Dependent”

Life Event Change

You have no dependents on file

[+ Add New Dependent](#)

Add dependent details and click on Save.

Add New Dependent

First Name: Last Name:

Initial:

Relationship:

Birth Date:

Gender:

Covered Under Other Plan

Effective: August 30, 2013

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

The dependent details will now appear.

Life Event Change

Judy Smith

Relationship: Child (under 21)
Gender: Female
Birth Date: 08/05/2013

Covered Under Other Plan: No

[+ Add New Dependent](#)

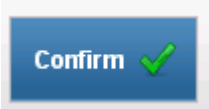
Click on Next until you reach the last page which is the Enrollment Summary page



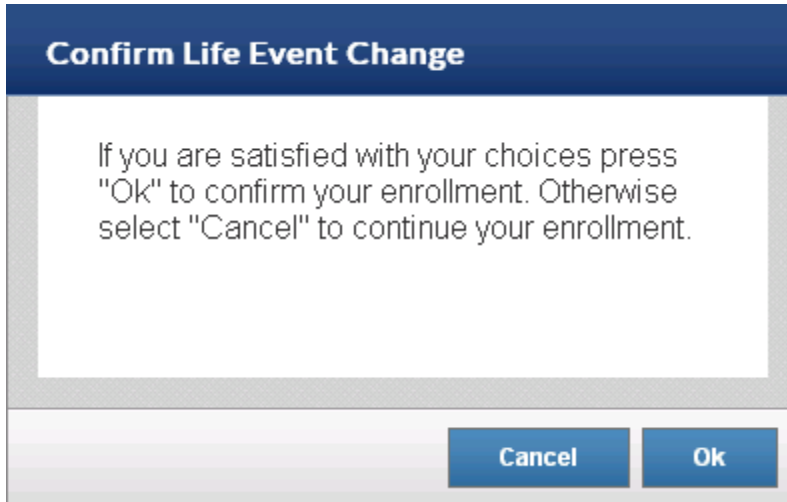
Note: If you are adding the first dependent ensure that the benefits are changed to family coverage on the Benefits pages.

Adding a Dependent - Login As

Click on Confirm on the Enrollment Summary page



A pop up will appear click on ok to confirm the enrolment.

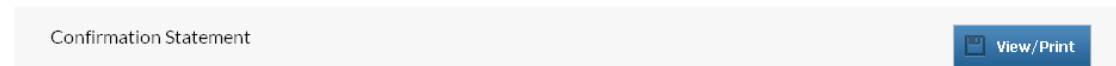


Your change is now complete. A new confirmation statement will be available to view or print.

Enrollment Process is Now Complete

Thank you, **John Smith**.

Your enrollment process is now complete! Your selections have been confirmed and submitted.



Update a Regular Dependent to a Student

Go to the Employee Drop Down



Click on Manage Employees

Do a search by looking up the employee number or last name. Click on Search

Manage Employees

Search By:

Log into the member by clicking on their name

Last Name + -	First Name + -
Smith	John

Click on the Dependent Tab
Click on the Dependent name

Covered Dependents For 0019066 John Smith				
Dependent Name	Birth Date	Relationship	Gender	Status
Michael Smith	08/08/1995	Child (under 21)	Male	<input type="button" value="Active"/>
Robert Smith	01/01/1993	Child (under 21)	Male	<input type="button" value="Active"/>
Judy Smith	08/05/2013	Child (under 21)	Female	<input type="button" value="Active"/>

Select Student from the drop down list

Last Name

Relationship

Gender

Update a Regular Dependent to a Student

Add the Effective date of the change

ie. Date in which the dependent reached maximum regular dependent age

Change Effective Date

Dependent Effective Date

Click on save at the bottom of the page

The Relationship has now been adjusted to indicate Student.

Covered Dependents For 0019066 John Smith					
Dependent Name	Birth Date	Relationship	Gender	Status	
Michael Smith	08/08/1995	Child (under 21)	Male	<input type="button" value="Active"/>	
Robert Smith	01/01/1992	Student (under 25)	Male	<input type="button" value="Active"/>	
Judy Smith	08/05/2013	Child (under 21)	Female	<input type="button" value="Active"/>	

Update a Dependent to a Disabled Dependent

Note: Before updating a dependent to a disabled status please ensure that it has been approved by the Medical underwriting team.

Go to the Employee Drop Down



Click on Manage Employees

Do a search by looking up the employee number or last name. Click on Search
Manage Employees

Search By:

Log into the member by clicking on their name

Last Name + -	First Name + -
Smith	John

Click on the Dependent Tab
Click on the Dependent name

Covered Dependents For 0019066 John Smith				
Dependent Name	Birth Date	Relationship	Gender	Status
Michael Smith	08/08/1995	Child (under 21)	Male	<input type="button" value="Active"/>
Robert Smith	01/01/1993	Child (under 21)	Male	<input type="button" value="Active"/>
Judy Smith	08/05/2013	Child (under 21)	Female	<input type="button" value="Active"/>

Change the relationship to Disabled

Edit Dependent

Please modify the fields you wish to change. When you are done press the "Save" button.

First Name	<input type="text" value="Robert"/>	Last Name	<input type="text" value="Smith"/>
Initial	<input type="text"/>	Relationship	<input type="text" value="Child (under 21)"/> <input type="text" value="Select"/> <input type="text" value="Child (under 21)"/> <input type="text" value="Student (ages 21- 25)"/> <input type="text" value="Disabled"/>
Birth Date	<input type="text" value="06/03/1996"/>	Gender	
Smoker Status			
Change Effective Date	<input type="text" value="03/01/2015"/>		
Dependent Effective Date	November 01, 2011		

Click save at the bottom of the page.

Updating an Employee's Salary mid plan year

Note: Salary updates usually are done if a significant increase is done to the member's salary. Please discuss this process with your Blue Cross team prior to making changes to the salary mid plan year.

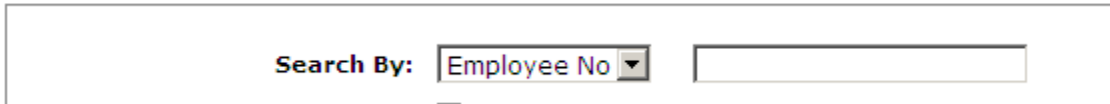
Go to the Employee Drop Down



Click on Manage Employees

Do a search by looking up the employee number or last name. Click on Search.

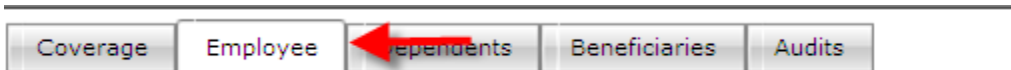
Manage Employees

The image shows a search interface for managing employees. It includes a 'Search By:' label followed by a dropdown menu currently set to 'Employee No'. To the right of the dropdown is an empty text input field for entering search criteria.

Log into the member by clicking on their name

Last Name + -	First Name + -
Smith	John

Go to the Employee tab



Click on Modify Employee at the bottom of the page



Scroll down to the Salary within the Employee Information

Updating an Employee's Salary mid plan year

Adjust all three salaries to the new amount (Current Frozen Earnings, Future Frozen Earnings and Current Earnings)

Current Frozen Earnings	<input type="text" value="50000"/>	Future Frozen Earnings	<input type="text" value="50000"/>
Current Earnings	<input type="text" value="50000"/>	Fraction of Full Time	<input type="text" value="100"/> %
Client Specific Code	<input type="text"/>	Years In System	2
RAMQ proof of coverage received?	<input type="radio"/> Yes <input checked="" type="radio"/> No		
Original Hire Date	<input type="text" value="07/25/2011"/>		

Enter the effective date of the change and enter the reason for change
Click on Save

Current Indicative Data Effective Date	N/A
New Indicative Data Effective Date	<input type="text" value="01/01/2013"/>
Reason For Change	<input type="text" value="Salary change"/>
<input type="button" value="Cancel"/> <input type="button" value="Save"/>	

Note: A pop up may appear if the email is not completed. Click on OK to continue

Click on the Coverage tab

<input type="button" value="Coverage"/>	<input type="button" value="Employee"/>	<input type="button" value="De"/>
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Click on the recalculate tab

<input type="button" value="Close"/>	
<input type="button" value="Overrides"/>	<input type="button" value="Recalculate"/>

Enter the effective date of the change. Click on the Recalculate button

You are about to recalculate the employee's benefits for Current period. To perform recalculation, please, click "Recalculate" button.

Effective Date:	<input type="text" value="01/01/2013"/>	<input type="button" value="Recalculate"/>
-----------------	---	--

A confirmation statement page will appear. Click on Confirm at the bottom of the page.

<input type="button" value="Cancel"/>	<input type="button" value="Confirm"/>
---------------------------------------	--

Click on View Confirmation and print the confirmation statement for the Employee. All amounts will now reflect the cost of benefits based on the new salary.

Applying Benefit Reductions and terminating benefits mid plan year

Note: Depending on your plan set up some benefits may have a reduction set up for some benefits that need to be applied once the member reaches a certain age. They may also have benefits that they are no longer eligible for mid plan year. If required by your plan set up you must make these adjustments throughout the year.

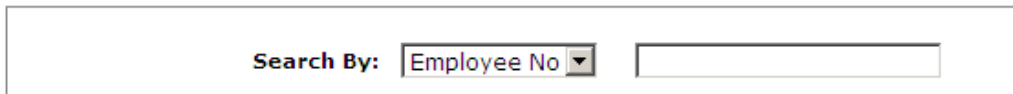
Go to the Employee Drop Down



Click on Manage Employees

Do a search by looking up the employee number or last name. Click on Search

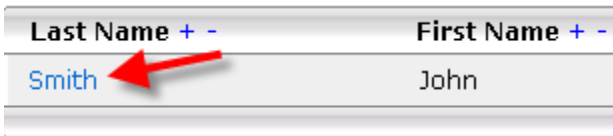
Manage Employees



The image shows a search form with the label 'Search By:'. A dropdown menu is open, showing 'Employee No' as the selected option. A red arrow points to the dropdown menu.

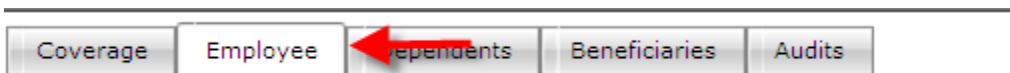
Log into the member by clicking on their name

Last Name + -	First Name + -
Smith	John



The image shows a table with two columns: 'Last Name + -' and 'First Name + -'. The first row contains the name 'Smith' under the last name column and 'John' under the first name column. A red arrow points to the name 'Smith'.

Go to the Employee tab



Applying Benefit Reductions and terminating benefits mid plan year

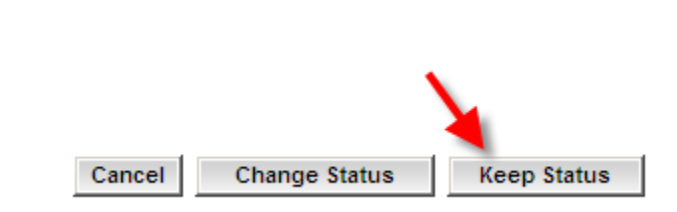
To terminate a benefit that the member is no longer eligible for:
Click on the Change Status button



Close

Current Status: Active

Click on the “Keep Status” button



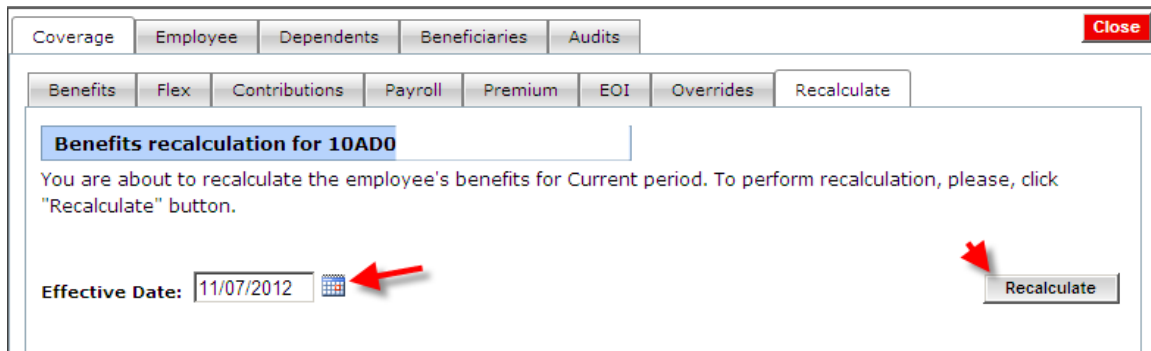
Change the “Action” to Terminated for each benefit you wish to terminate (Member must have at least one benefit active)

Change the effective date

Employee AD&D Insurance	Active	<input type="button" value="No Action"/>	<input type="text" value="08/30/2013"/>
Child AD&D Insurance	Active	<input type="button" value="Terminate"/>	<input type="text" value="08/30/2013"/>
Employee Life Insurance	Active	<input type="button" value="No Action"/>	<input type="text" value="08/30/2013"/>

Click on save at the bottom of the page

Go to the coverage tab then the Recalculate tab and enter the effective date of the change and select the recalculate button



Coverage Employee Dependents Beneficiaries Audits

Benefits Flex Contributions Payroll Premium EOI Overrides

Benefits recalculation for 10AD0

You are about to recalculate the employee's benefits for Current period. To perform recalculation, please, click "Recalculate" button.

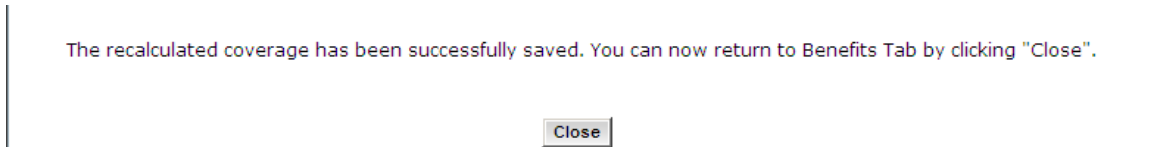
Effective Date:

Applying Benefit Reductions and Terminating Benefits mid plan year

A confirmation page will appear. Click on Confirm at the bottom of the page



A pop up will come up to indicate that the recalculated coverage has been successful.



The Recalculation will apply any reductions to the member's coverage that is required.

Adding a Dependent/ Changing Benefits to Family - Login As

Go to the Employee Drop Down



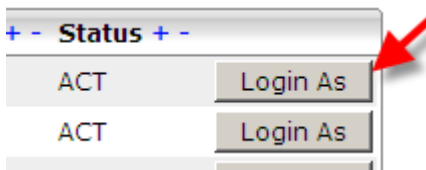
Click on Manage Employees

Do a search by looking up the employee number or last name. Click on Search.

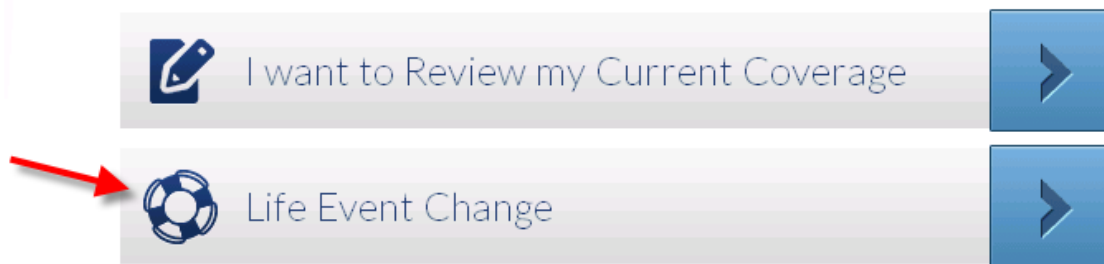
Manage Employees

Search By:

Click on "Login As" option for the member




Select Life Event Change at the bottom of the page



Adding a Dependent/ Changing Benefits to Family - Login As

Change the effective date and select the correct option from the list available. Click on next at the bottom of the screen

Note: Depending on your set up for your group the below options may vary.

Date of Life Event Change: 

- Marriage or eligibility of your common-law spouse
- Separation or divorce
- Birth or adoption of a child
- Death of your spouse or of the last dependent child
- Loss of a child, or a child becomes/is no longer eligible for coverage
- Involuntarily loss or gain access to coverage under your spouse's plan

Click on “I Agree” for the disclaimer

Disclaimer

Your employer may require you to provide documentation regarding the date of your status change.

Benefits plans must be administered in accordance with plan rules. Under plan rules, you are permitted to change your coverage during the year only if you experience certain life events as described in the Plan Details, such as birth of a child or marriage.

By completing this change, you certify that you have read the Life Event information in the Plan Details and that the information that you are about to provide is true and correct. You understand that any fraudulent statement, falsification or material omission of information may subject you to discipline up to and including termination of employment.

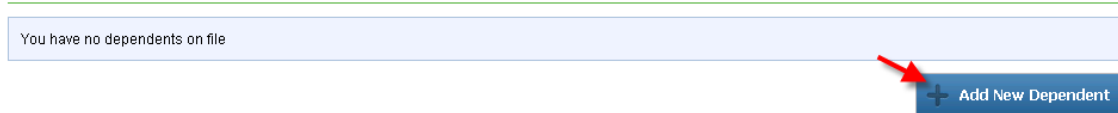
Adding a Dependent/ Changing Benefits to Family - Login As

Click on Next on the personal information page



Click on Add New Dependent

Life Event Change



Complete the dependent details and click on Save

A screenshot of a web form titled 'Add New Dependent'. The form has a dark blue header. Below the header, there are several input fields: 'First Name' (Jacy), 'Last Name' (Smith), 'Initial' (empty), 'Relationship' (Child (under 21)), 'Birth Date' (September 1, 2013), and 'Gender' (Female). Below these fields is a light blue bar with a radio button and the text 'Covered Under Other Plan' followed by an information icon. At the bottom of the form, there is a grey bar with the text 'Effective: September 1, 2013', a 'Cancel' button, and a 'Save' button with a green checkmark.

The dependent will now appear. Click on next.



Coverage should now indicate family on the Health Benefit page.

Note: Depending on your plan design you may need to select “Change dependent coverage” in order to change benefits to family or to add the new dependent to the coverage.

Click on Next until you reach the Enrollment Summary page

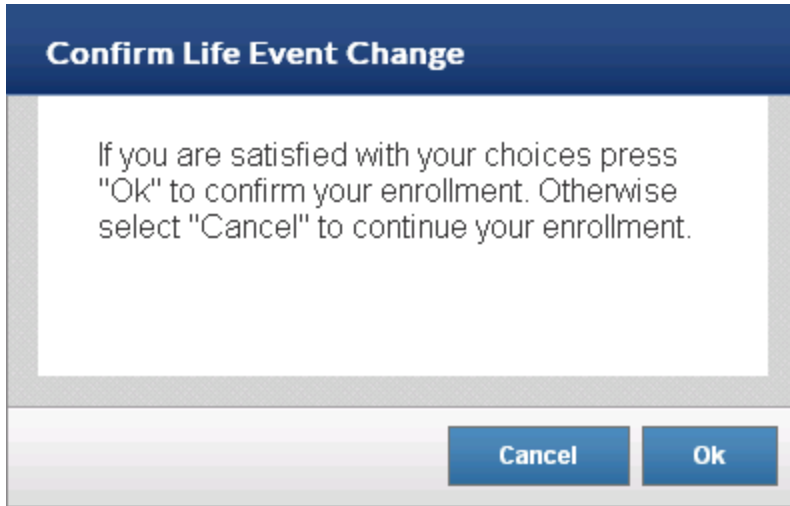


Adding a Dependent/ Changing Benefits to Family - Login As

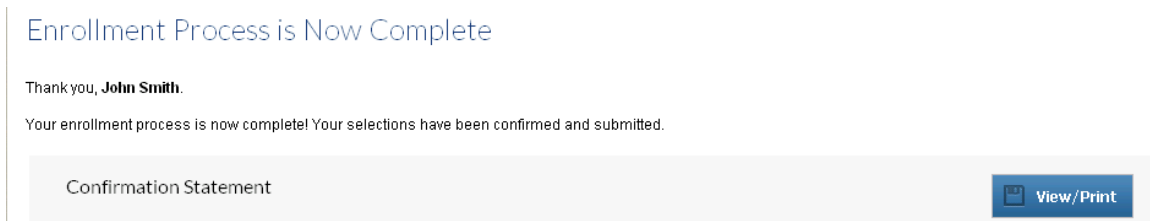
Click on Confirm



A pop up will appear to confirm the life event. Click on OK.



A confirmation page will appear to indicate the process is complete you have the option to view/print your Confirmation statement



Removing a Dependent/ Changing Benefits to Single - Login As

Go to the Employee Drop Down



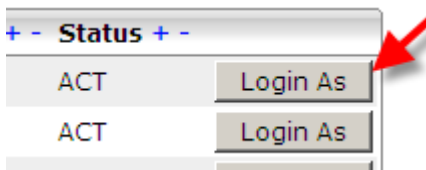
Click on Manage Employees

Do a search by looking up the employee number or last name. Click on Search.

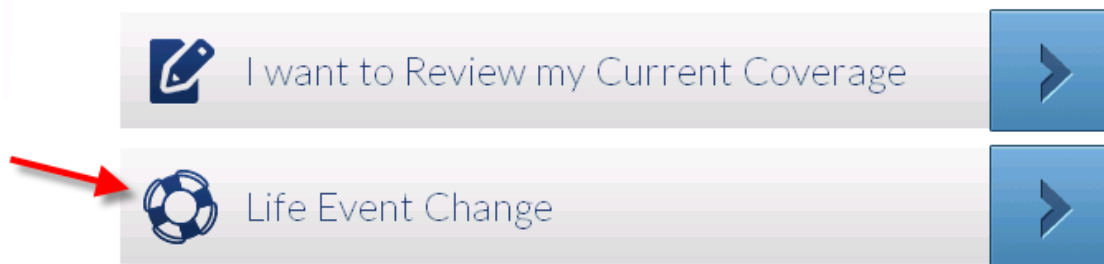
Manage Employees

Search By:

Click on "Login As" option for the member




Select Life Event Change at the bottom of the page



Removing a Dependent/ Changing Benefits to Single - Login As

Change the effective date and select the correct option from the list available. Click on next at the bottom of the screen

Note: Depending on your set up for your group the below options may vary.

Date of Life Event Change: 

- Marriage or eligibility of your common-law spouse
- Separation or divorce
- Birth or adoption of a child
- Death of your spouse or of the last dependent child
- Loss of a child, or a child becomes/is no longer eligible for coverage
- Involuntarily loss or gain access to coverage under your spouse's plan

Click on “I Agree” for the disclaimer

Disclaimer

Your employer may require you to provide documentation regarding the date of your status change.

Benefits plans must be administered in accordance with plan rules. Under plan rules, you are permitted to change your coverage during the year only if you experience certain life events as described in the Plan Details, such as birth of a child or marriage.

By completing this change, you certify that you have read the Life Event information in the Plan Details and that the information that you are about to provide is true and correct. You understand that any fraudulent statement, falsification or material omission of information may subject you to discipline up to and including termination of employment.

Removing a Dependent/ Changing Benefits to Single - Login As

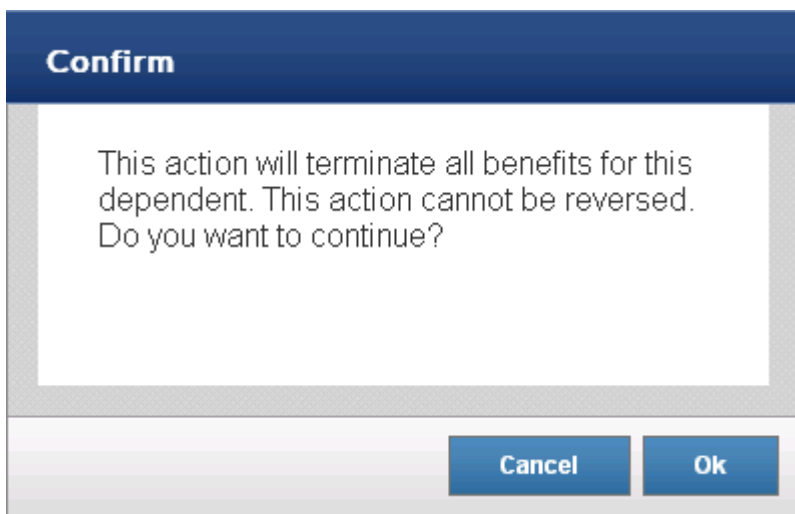
Click on Next on the personal information page unless updates are required as well



Click on the trash can beside the dependent details.



A pop up will appear for you to confirm that you want to remove the dependent. Click on OK.



The dependent will no longer appear. Click on next.



Coverage should now indicate single.

Removing a Dependent/ Changing Benefits to Single - Login As

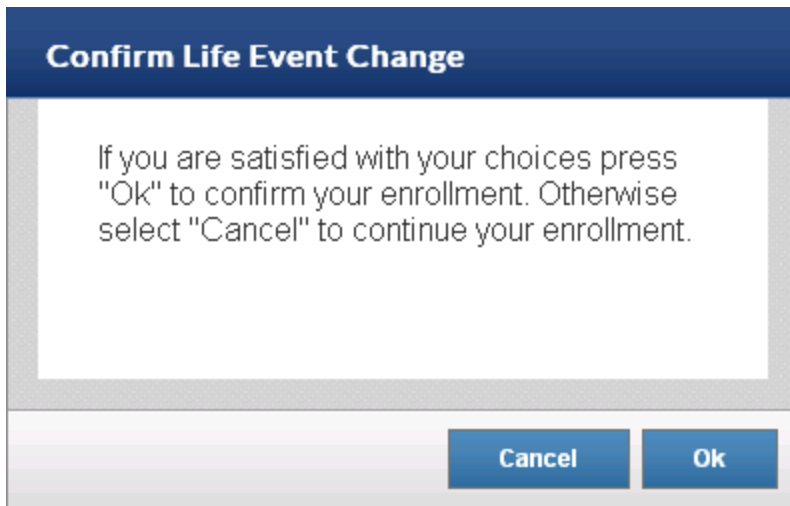
Click on Next until you reach the Enrollment Summary page.



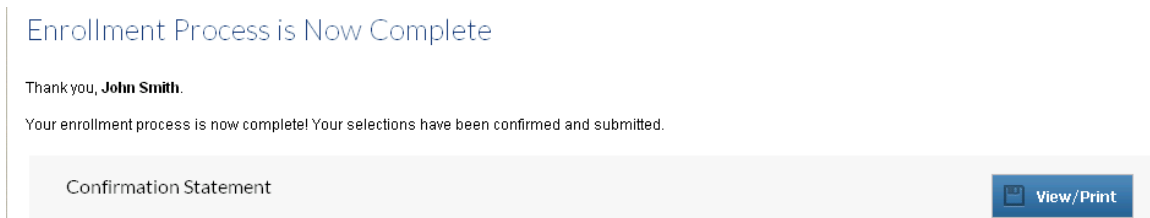
Click on Confirm



A pop up will appear to confirm the life event. Click on OK.



A confirmation page will appear to indicate the process is complete you have the option to view/print your Confirmation statement



Removing Health and/or Dental Benefits (Spousal Coverage) - Login As

Note: Reason for removing Health and Dental Benefits mid plan year must be due to a gain of coverage.

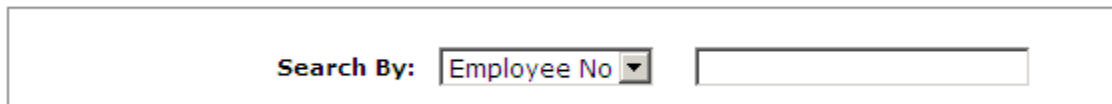
Go to the Employee Drop Down



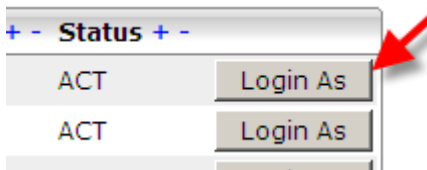
Click on Manage Employees

Do a search by looking up the employee number or last name. Click on Search.

Manage Employees

The image shows a search form titled 'Manage Employees'. It includes a 'Search By:' label, a dropdown menu currently set to 'Employee No', and an empty text input field for the search criteria.

Click on "Login As" option for the member



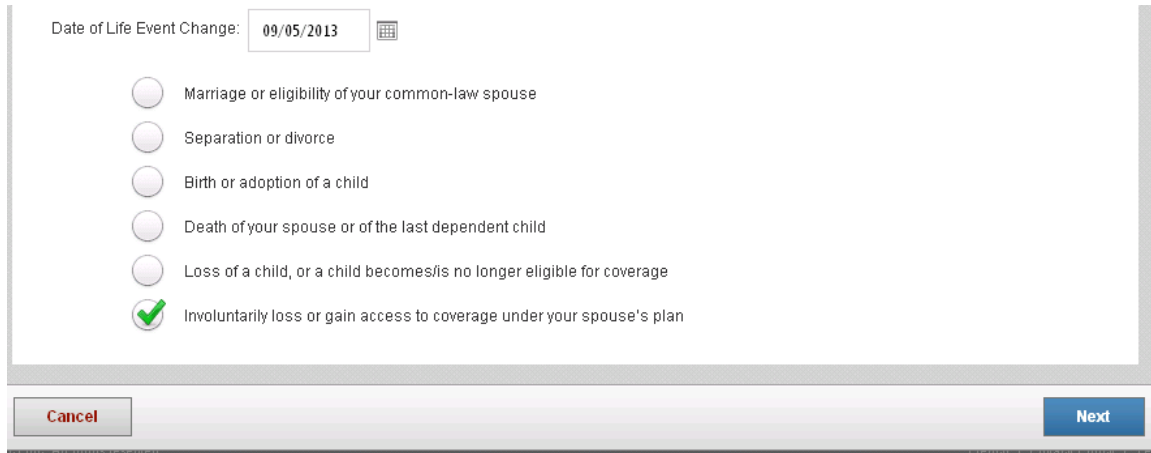
Select Life Event Change at the bottom of the page




Removing Health and/or Dental Benefits (Spousal Coverage) - Login As

Change the effective date and select the correct option from the list available. Click on next at the bottom of the screen

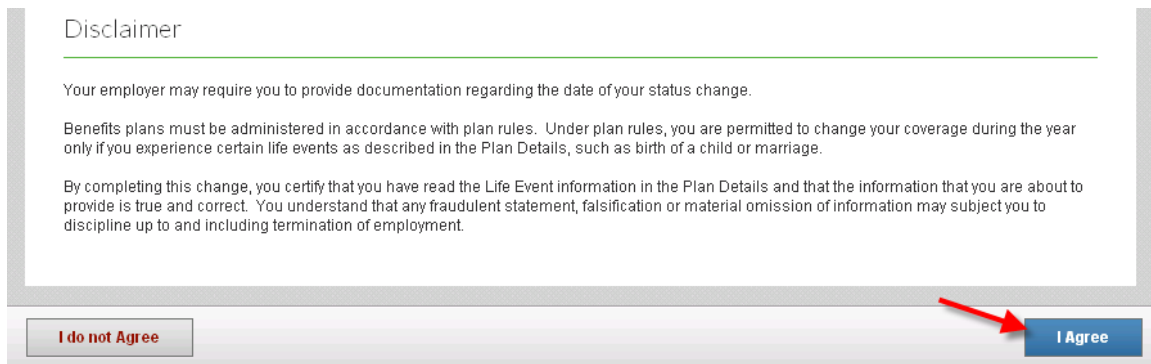
Note: Depending on your set up for your group the below options may vary.



Date of Life Event Change: 

- Marriage or eligibility of your common-law spouse
- Separation or divorce
- Birth or adoption of a child
- Death of your spouse or of the last dependent child
- Loss of a child, or a child becomes/is no longer eligible for coverage
- Involuntarily loss or gain access to coverage under your spouse's plan

Click on “I Agree” for the disclaimer



Disclaimer

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By completing this change, you certify that you have read the Life Event information in the Plan Details and that the information that you are about to provide is true and correct. You understand that any fraudulent statement, falsification or material omission of information may subject you to discipline up to and including termination of employment.

Click on Next on the personal information and dependent pages unless updates are required as well



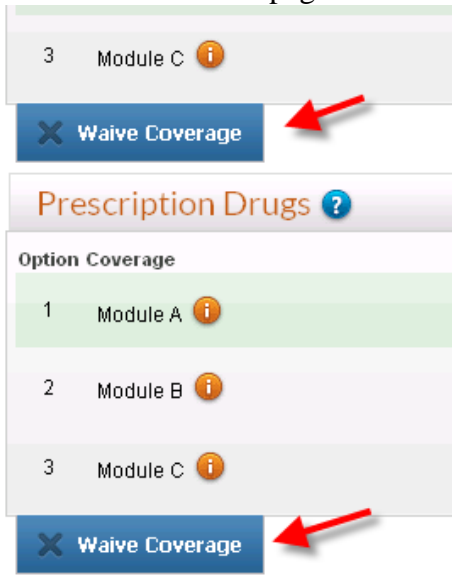
PERSONAL INFORMATION

Removing Health and/or Dental Benefits (Spousal Coverage) - Login As

Note: Depending on your plan set up you may have an option to opt out of the benefit and not have the waive coverage button available. (See screen shot for Opt out coverage)

Waive Coverage Option (If Applicable)

On the Health Benefit page select Waive Coverage for all benefits



Opt out option (If Applicable)

If you have the opt out option then select this option for each benefit that is no longer required due to spousal coverage.

The screenshot shows a table titled 'Health Care' with a sub-section 'Option Coverage'. The table has five columns: 'Category', 'Annual Cost', 'Mutreco \$ Applied', 'Per Pay', and 'Select'. A red arrow points to the 'Select' column for the first row.

Option Coverage	Category	Annual Cost	Mutreco \$ Applied	Per Pay	Select
1 No coverage/Opt out	-	\$0			<input type="radio"/>

Removing Health and/or Dental Benefits (Spousal Coverage) - Login As

Complete the waiver form for each benefit that needs to be waived. Click on save.

Prescription Drugs Coverage Waiver

You have selected to waive your Prescription Drugs coverage. In order to proceed you must fill in all the fields below.

Plan Start Date:	01/01/2013
Reason for Waiver:	<input type="text" value="Spousal Coverage"/>
For Proof of Coverage	
Insurance Company:	<input type="text" value="Company ABC"/>
Policy Number:	<input type="text" value="12345-123"/>

Note: All fields must be completed to submit form

Click on Next until you reach the Enrollment Summary page.

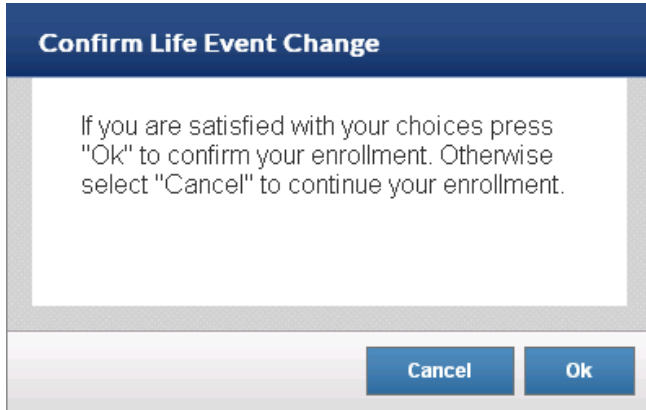


Click on Confirm

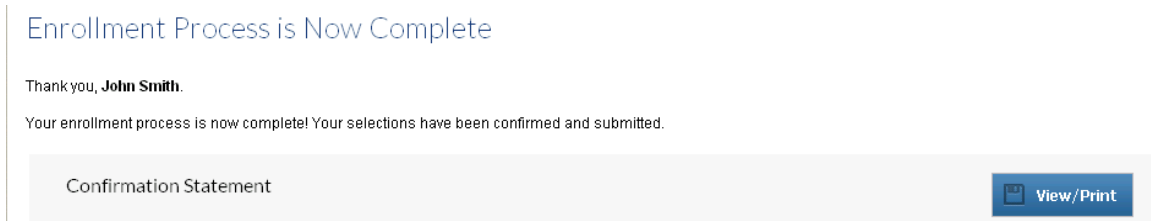


A pop up will appear to confirm the life event. Click on OK.

Removing Health and/or Dental Benefits (Spousal Coverage) - Login As



A confirmation page will appear to indicate the process is complete you have the option to view/print your Confirmation statement



Adding Health and/or Dental Benefits (Loss of Spousal Coverage) - Login As

Note: Reason for adding Health and Dental Benefits mid plan year must be due to loss of coverage.

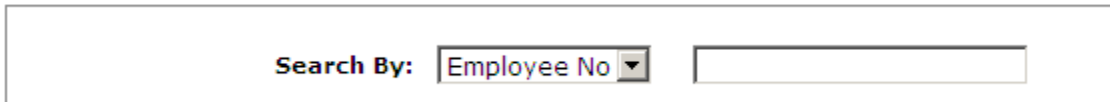
Go to the Employee Drop Down



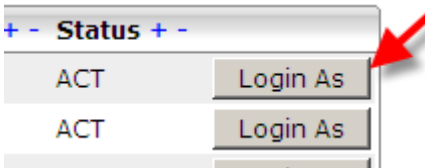
Click on Manage Employees

Do a search by looking up the employee number or last name. Click on Search.

Manage Employees

The image shows a search form titled "Manage Employees". It includes a "Search By:" label, a dropdown menu currently set to "Employee No", and an empty text input field for the search criteria.

Click on "Login As" option for the member



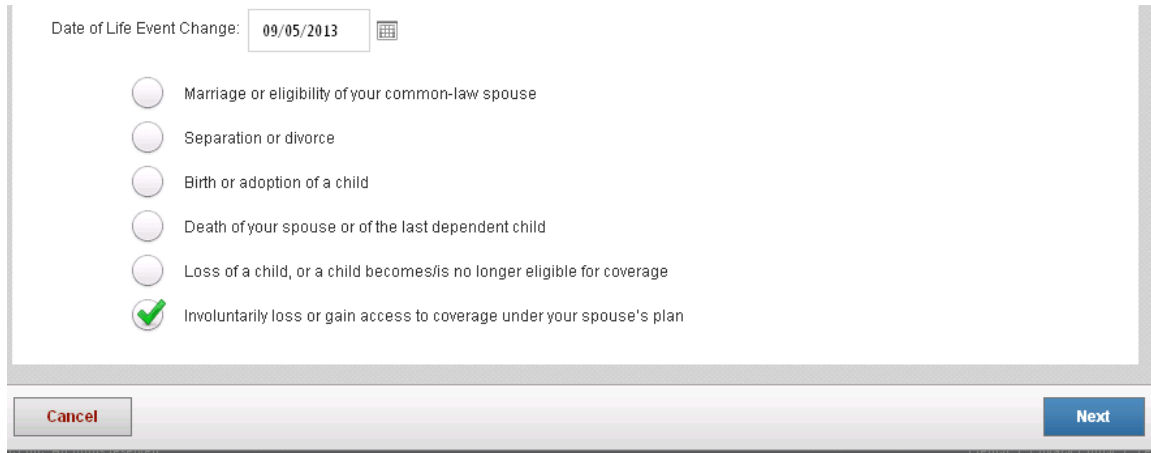
Select Life Event Change at the bottom of the page




Adding Health and/or Dental Benefits (Loss of Spousal Coverage) - Login As

Change the effective date and select the correct option from the list available. Click on next at the bottom of the screen

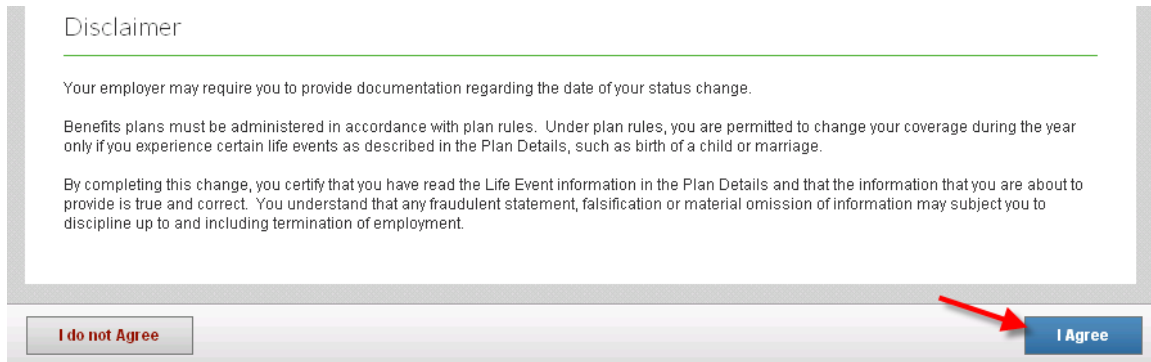
Note: Depending on your set up for your group the below options may vary.



Date of Life Event Change: 

- Marriage or eligibility of your common-law spouse
- Separation or divorce
- Birth or adoption of a child
- Death of your spouse or of the last dependent child
- Loss of a child, or a child becomes/is no longer eligible for coverage
- Involuntarily loss or gain access to coverage under your spouse's plan

Click on “I Agree” for the disclaimer



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Click on Next on the personal information and dependent pages unless updates are required as well



PERSONAL INFORMATION

Adding Health and/or Dental Benefits (Loss of Spousal Coverage) - Login As

Note: Depending on your plan set up you may have an option to opt out of the benefit and not have the remove coverage button available. (See screen shot for Opt out coverage)

Remove Waiver Option (If Applicable)

On the Health Benefit page select remove waiver for all benefits now required

Health Benefits ?
Coverage has been waived
X Remove Waiver

Prescription Drugs ?
Coverage has been waived
X Remove Waiver

Dental Benefits ?
Coverage has been waived
X Remove Waiver

Select the benefit option.

Health Benefits ?		Category	Annual Cost	flex \$ Applied	Per Pay	Select
1	Module A	Single	\$843			<input type="radio"/>
2	Module B	Single	\$1,071	\$149	\$35.46	<input checked="" type="radio"/>
3	Module C	Single	\$1,627			<input type="radio"/>

Adding Health and/or Dental Benefits (Loss of Spousal Coverage) - Login As

Opt out option (If Applicable)

If you have the opt out option then select the new option for each benefit that is now required.

Health Care ?						
Option Coverage	Category	Annual Cost	Ituteco \$ Applied	Per Pay	Select	
1 No coverage/Opt out ⓘ	-	\$0			<input type="radio"/>	
2 Basic ⓘ	Family	\$1,840	\$1,840	\$0.00	<input checked="" type="radio"/>	

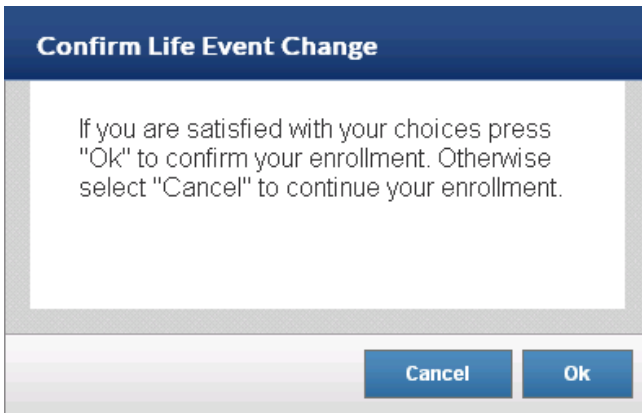
Click on Next until you reach the Enrollment Summary page.



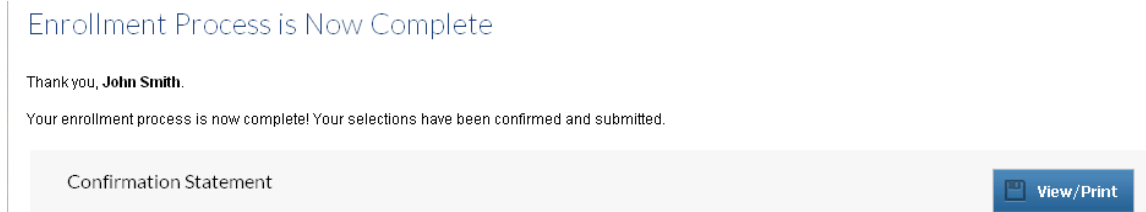
Click on Confirm



A pop up will appear to confirm the life event. Click on OK.



A confirmation page will appear to indicate the process is complete you have the option to view/print your Confirmation statement



Changing a Benefit Option

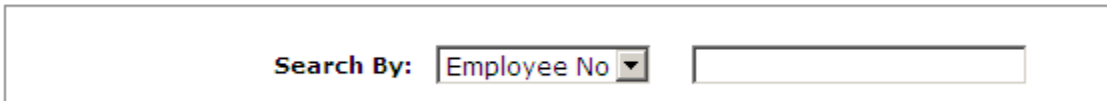
Go to the Employee Drop Down



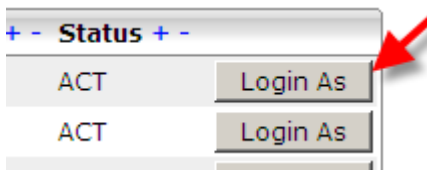
Click on Manage Employees

Do a search by looking up the employee number or last name. Click on Search.

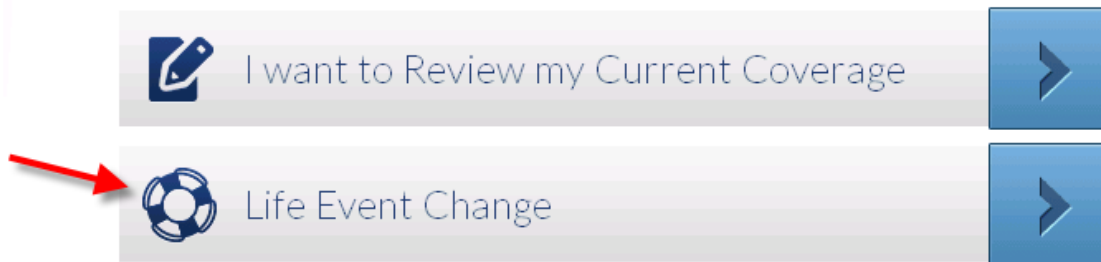
Manage Employees

The image shows a search interface for managing employees. It includes a 'Search By:' label, a dropdown menu currently set to 'Employee No', and an empty search input field.

Click on "Login As" option for the member



Select Life Event Change at the bottom of the page



Changing a Benefit Option

Change the effective date and select the correct option from the list available. Click on next at the bottom of the screen

Note: Depending on your set up for your group the below options may vary.

Date of Life Event Change:

- Marriage or eligibility of your common-law spouse
- Separation or divorce
- Birth or adoption of a child
- Death of your spouse or of the last dependent child
- Loss of a child, or a child becomes/is no longer eligible for coverage
- Involuntarily loss or gain access to coverage under your spouse's plan

Click on “I Agree” for the disclaimer

Disclaimer

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Click on Next on the personal information and dependent pages unless updates are required as well

Changing a Benefit Option

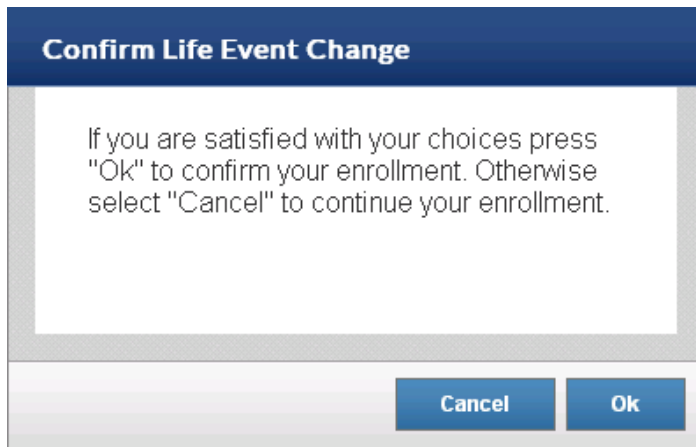
On the Benefits pages select the new option for each benefit that requires to be changed to a new option. Click next to go through all the benefit pages.

Health ?		Option Coverage	Category	Annual Cost	flex \$ Applied	Per Pay	Select
1	Basic	Family	\$1,923				<input type="radio"/>
2	Comprehensive	Family	\$2,667	\$1,870	\$15.33	<input checked="" type="radio"/>	

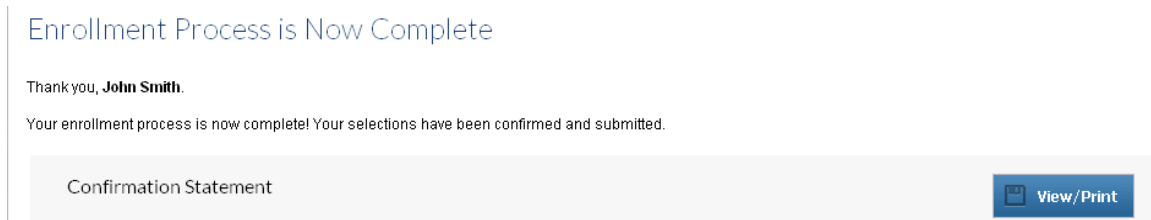
Once on the Enrollment Summary page click on Confirm



A pop up will appear to confirm the life event. Click on OK.



A confirmation page will appear to indicate the process is complete you have the option to view/print your Confirmation statement



Transferring a Member

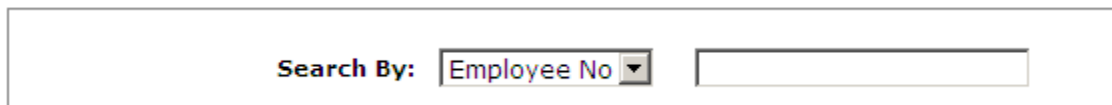
Go to the Employee Drop Down



Click on Manage Employees

Do a search by looking up the employee number or last name

Manage Employees

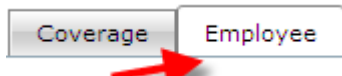


The image shows a search interface with a 'Search By:' label. A dropdown menu is open, showing 'Employee No' as the selected option. To the right of the dropdown is an empty text input field.

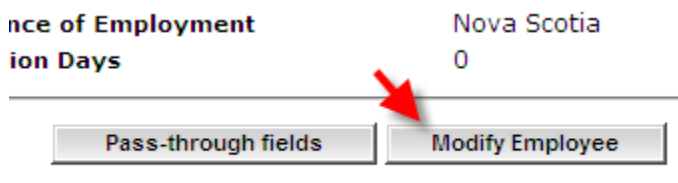
Log into the member by clicking on their name

Last Name + -	First Name + -
Smith	John

Go to the Employee Tab



Click on Modify Employee at the bottom of the page



The image shows the bottom section of the member's profile page. It includes a table with the following data:

nce of Employment	Nova Scotia
ion Days	0

Below the table are two buttons: 'Pass-through fields' and 'Modify Employee'. A red arrow points to the 'Modify Employee' button.

Transferring a Member

Depending on the set up of your group you may need to adjust the following options:

Update Hire Date (for eligibility) to the effective date of the transfer to the new Division.

Change the division by selecting an option from the drop down list.

Change the payroll by selecting an option from the drop down list.

Change the cost center by selecting an option from the drop down list.

Change the location code by selecting an option from the drop down list.

Update the salary in all three fields.

Employee Information <small>(click to hide)</small>			
Employee No.	0023601	Payroll No	0023601
Division	Regular - all other prov	Hire Date (for Eligibility)	07/16/2001
Payroll	ADP	Province of Employment	Ontario
Cost Center	Nelson	Vacation Days	0
Location Code	CANADA		
Earning Type*	Salary		

If you selected 'Salary', please enter the annual amount into each Earnings field below. If you selected 'Hourly', please enter the hourly rate into each Earnings field. All amounts will be assigned the same earnings type.


Enter Effective date and reason for change and click on save.

Current Indicative Data Effective Date	N/A
New Indicative Data Effective Date	
Reason For Change	

A Pop up box may come up to indicate that the email is not completed

Click on OK to continue

Message from webpage [X]

 Personal email address has been selected as preferred, but not entered. Continue saving data?

Transferring a Member

On the Employee Tab under the Division you will notice a “**Switch Plan**” button. This must be clicked on in order to change the benefits.

Note: This will only be an option if there is a change in the benefits.

Employee Information <small>(click to hide)</small>		
Employee No.	0023601	P.
Division	Regular - all other provinces	H
		Switch Plan
Payroll	ADP	Pi

A pop up will come up.

Select the option to “Open the employee’s enrollment window so they can make their new elections” or you can do a login as and make the selections for them. (Recommended)

You can also select the option “I will make the employee’s new elections from the admin.

Ensure the effective date is correct and enter a reason for the change

Click on Switch Plan

Switch Plan

You have selected to switch plans for the employee.
This operation will:

1. **Terminate current coverage.**
2. **Generate payroll adjustments.**
3. **Generate premium adjustments.**
4. **Remove terminated coverages.**
5. **Remove subscriptions history.**

This operation cannot be undone. If you would like to perform this operation please enter the effective date and the reason for the change.

Effective Date:

Change Reason:

Once the above is completed how will the employee's new elections be entered?

I will make the employee's new elections from the admin.

Open the employee's enrollment window so they can make their new elections.

The switch plan is a

Flex to Flex


Other (Flex to Traditional, Traditional to Flex, Traditional to Traditional)

Employee's new enrollment window: from to

Transferring a Member

If applicable you will see the waiting periods at the bottom of the page on the employee tab. To update click on Modify Waiting button and change the waiting period to Yes or No and enter change reason and save.

Future Frozen Earnings	\$25,571.00
Fraction of Full Time	100 %
Years In System	0
Apply Waiting Period	Yes
Modify Waiting	

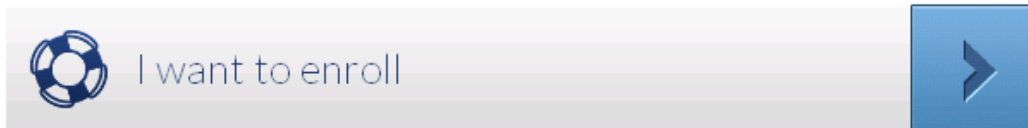


Note: The coverage tab will now have no benefits listed.

You can reset the members PIN on the Employee tab and advise them to select their benefits or you can select their benefits for them through the Login As option.

Login As options

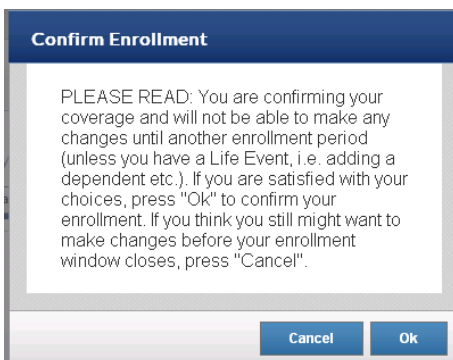
Click on the “I want to Enroll” at the bottom of the page



Complete the Enrollment by completing the mandatory information. Click next to continue through each page until you reach the Enrollment Summary.

Click on Confirm.

A pop up will appear to confirm the enrollment. Click on OK.



Transferring a Member

The Confirmation statement will appear to View/Print.

Thank you, **John Smith**.

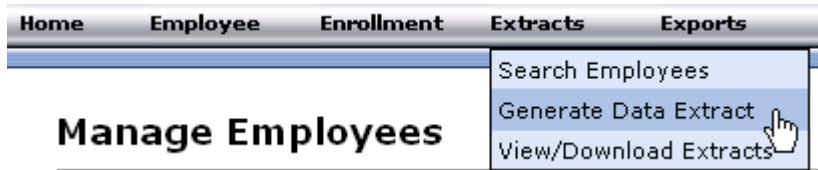
Your enrollment process is now complete! Your selections have been confirmed and submitted.

Confirmation Statement

 [View/Print](#)

Generate Data Extracts

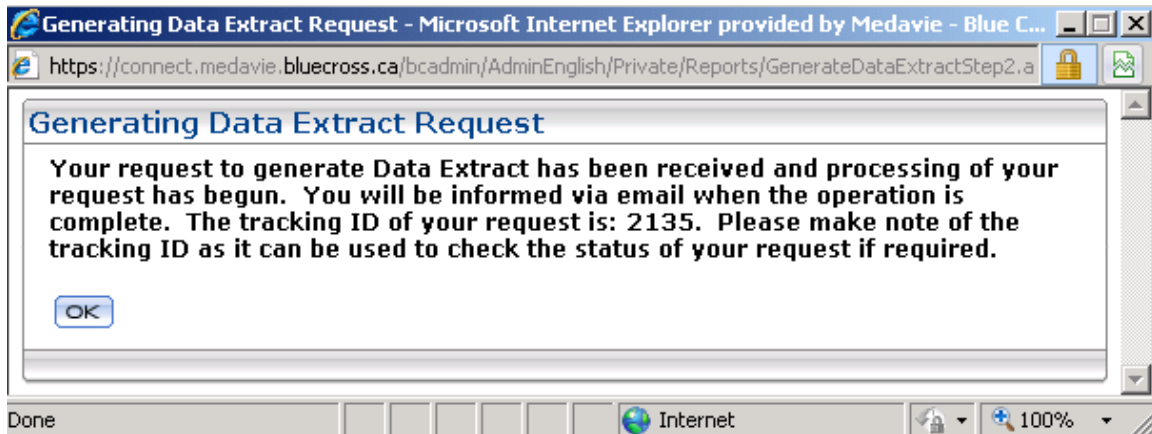
Click on the Extract tab. Select Generate Data Extracts. Enter the Extract Name. Select the criteria you would like to run the query for. Select the Extract Type (ie. Employee Information, Dependent Information etc.)



Click on Execute

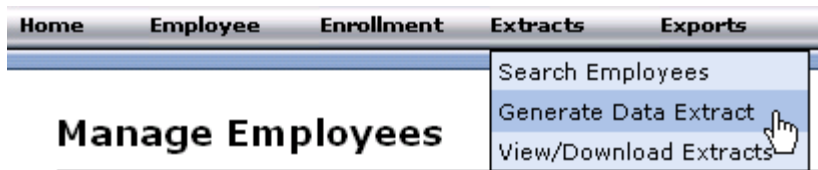
A screenshot of the 'Generate Data Extract' form in the Medavie Blue Cross system. The form is titled 'Generate Data Extract' and has the Medavie Blue Cross logo in the top right corner. It contains several sections: 'Extract Name' with a text input field containing 'Employee Data'; 'Selection Criteria' with dropdown menus for Status (Active), Gender, Age (with a 'to' field), Language, and Dependent Status; and another set of dropdowns for Division, Cost Center, Location, and Province, along with a 'Change Date' field with a date range and calendar icons. Below these is the 'Extract Type' section with radio buttons for Employee Information, Dependent Information, Current Benefit Subscriptions, Current Flex Allocation, Beneficiary Information, and Current Waived Subscriptions. There are also radio buttons for Future Benefit Subscriptions, Future Flex Allocation, and Future Waived Subscriptions. A note states: '(Note: Future Extracts are only available during the Annual Enrollment Period.)'. An 'Execute' button is located at the bottom right of the form.

A pop up message will appear to advise that the Data Extract request was received. Click on Ok



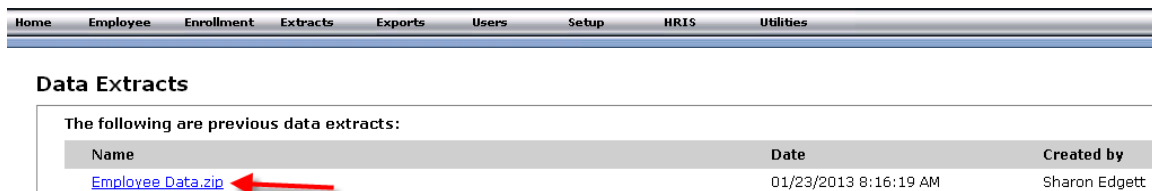
Generate Data Extracts

Click on the Extract tab. Select the View/Download Extracts

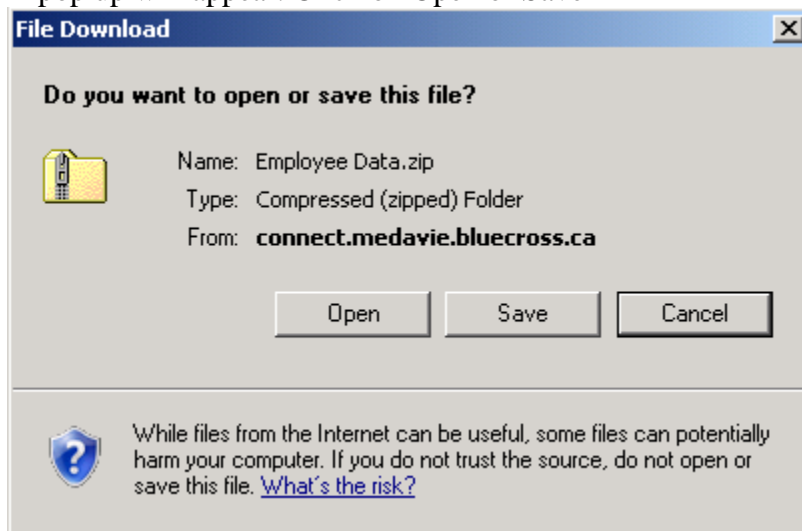


Your Data Extract just requested will appear (may take a minute to appear)

Click on the Name of the Extract you wish to open.



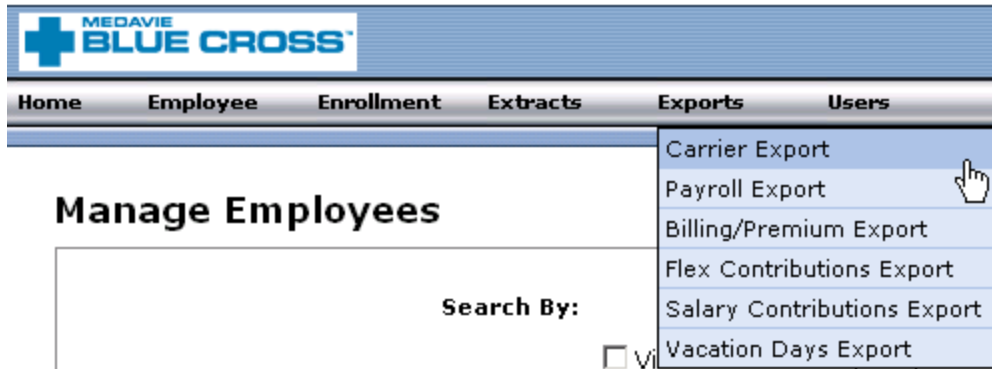
A pop up will appear. Click on Open or Save



If open is selected then the file will open up in a .csv zip file. You can open and work with the data available.

Run a Carrier Export

Click on the Exports tab. Select Carrier Export.



Click on Next for the Carrier File you want to Export

Carrier Exports

Select the policy below you wish to export:

Carrier	Policy	Last Export
Blue Cross		February 18, 2013 to March 5, 2013

[Next](#)

Enter date range for the export. Click on Export.

Blue Cross () policy #

Please enter the date range for which you wish to export this policy

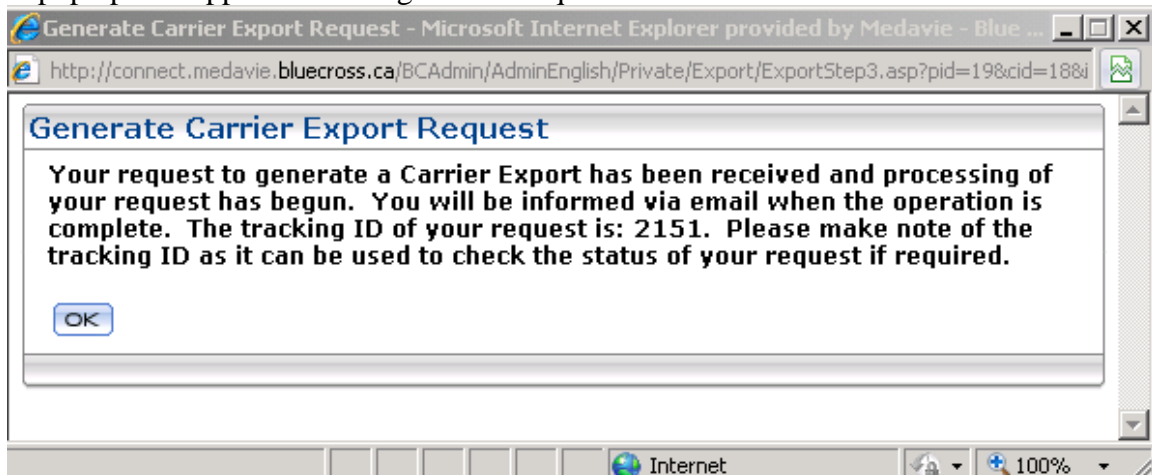
Export Period: to

[Back](#) [Export](#)

The following are previous exports of the above policy:

Carrier Exports (Start Date to End Date)	
February 18, 2013 to March 5, 2013	Download Export
January 27, 2013 to February 18, 2013	Download Export

A pop up will appear indicating that the request was received. Click on Ok.



Run a Carrier Export

Return to the Carrier Export results by clicking on Next.

Last Export
January 23, 2013 to
January 31, 2013

[Next](#)



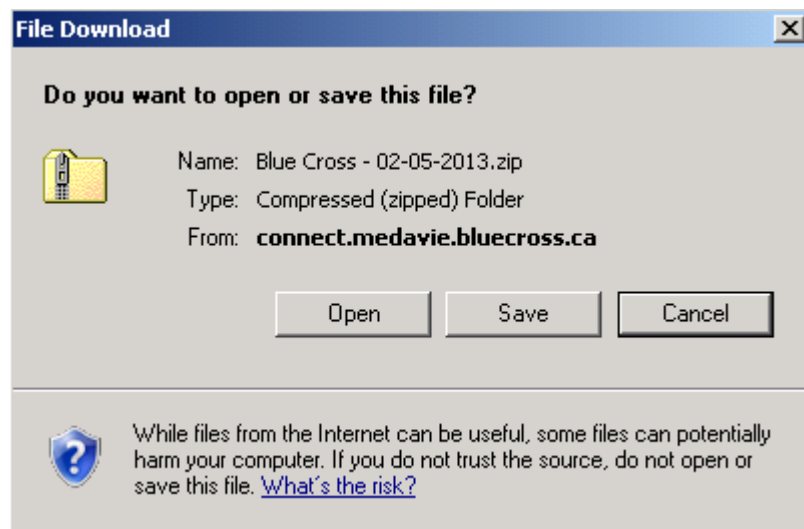
Select the Export just requested. Click no Download report.

The following are previous exports of the above policy:

Carrier Exports (Start Date to End Date)	
January 22, 2013 to January 26, 2013	Download Export

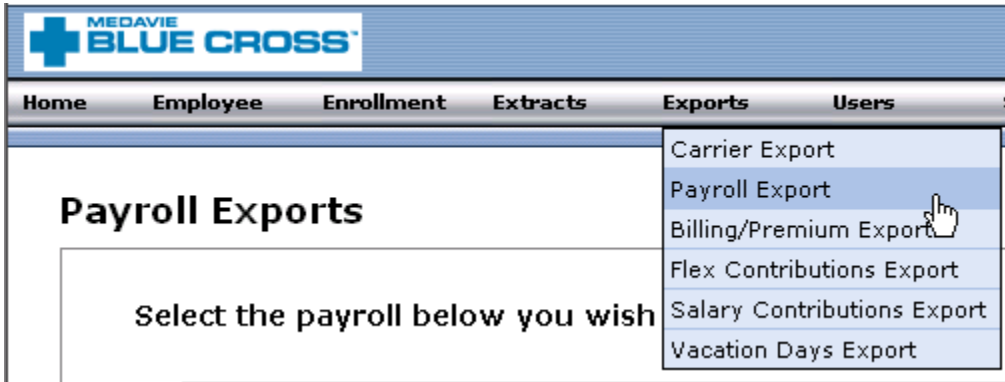


You can now Save the document and send the file to Blue Cross as per the process that has been set up for your group.



Run a Payroll Export

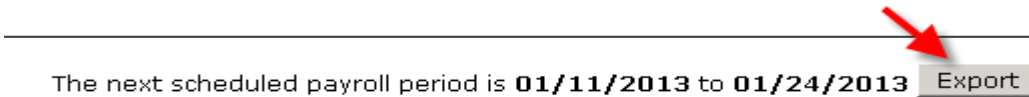
Click on the Exports tab. Select Payroll Export.



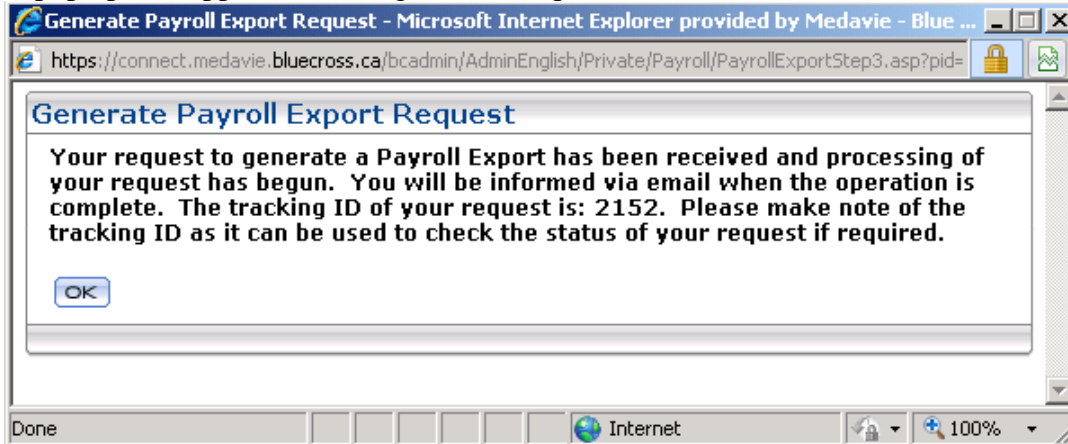
Click on Next for the Payroll File you want to Export



At the bottom of the page click on Export. The next payroll period will automatically populate.



A pop up will appear indicating that the request was received. Click on Ok.



Run a Payroll Export

Return to the Payroll Export results by clicking on Next.

RU extract	WEBST Full,NONE,AML	January 10, 2013	Next
Ceridian	WEBST Change,Separate,TEXT	December 30, 2012 to January 12, 2013	

You will now see your export range just requested.

Payroll ADP

The following are previous exports of the above payroll:

[ALL](#) | [2009](#) | [2010](#) | [2011](#) | [2012](#) | 2013

Payroll Exports (Start Date to End Date)

January 11, 2013 to January 24, 2013
(Run on February 5, 2013 @ 1:59:47 PM)

Click on Download Payroll

Payroll ADP

The following are previous exports of the above payroll:

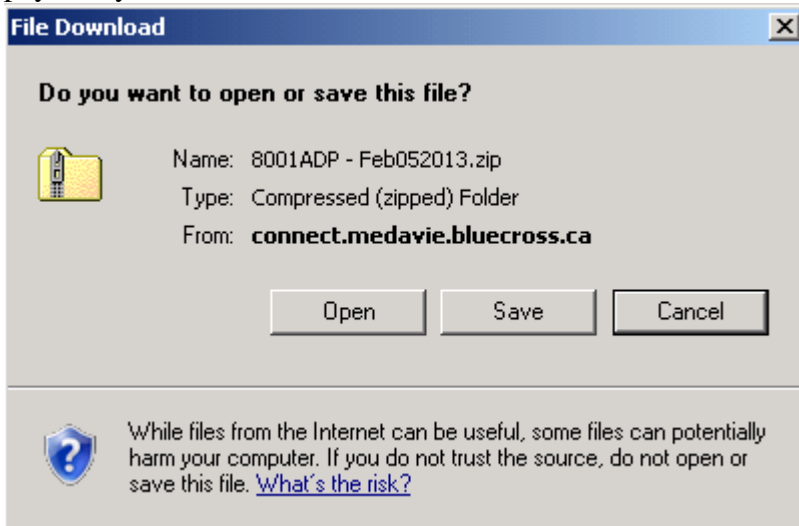
[ALL](#) | [2009](#) | [2010](#) | [2011](#) | [2012](#) | 2013

Payroll Exports (Start Date to End Date)

January 11, 2013 to January 24, 2013
(Run on February 5, 2013 @ 1:59:47 PM)

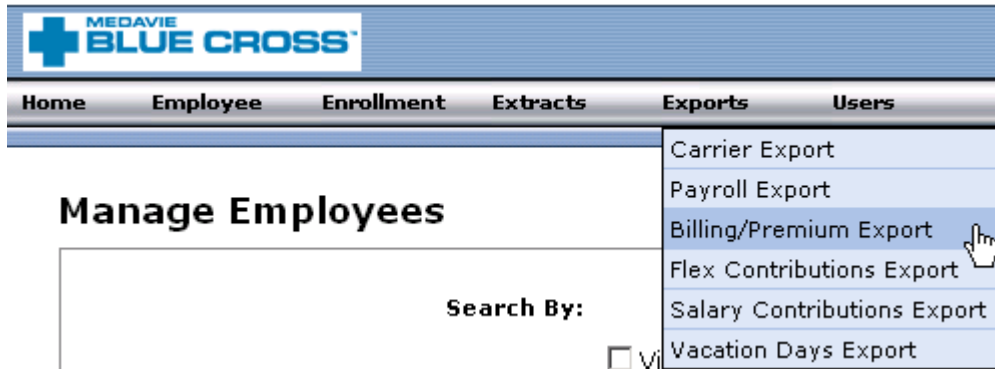
[Download Payroll](#)

You can now Save the document and send to your payroll provider or import into your payroll systems.

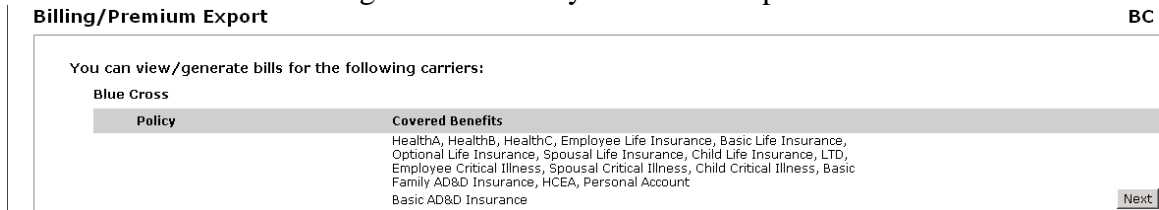


Run a Billing/Premium Export

Click on the Exports tab. Select Billing/Premium Export.

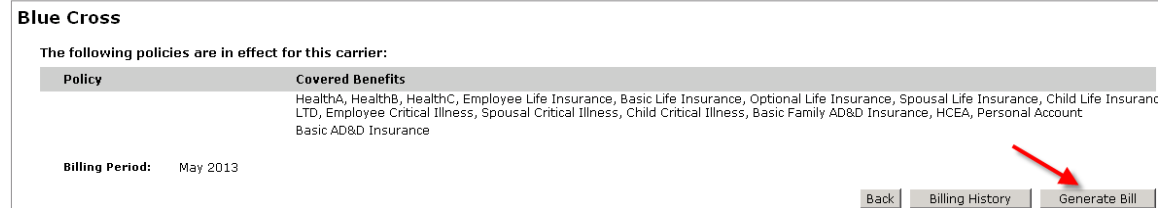


Click on Next for the Billing/Premium File you want to Export

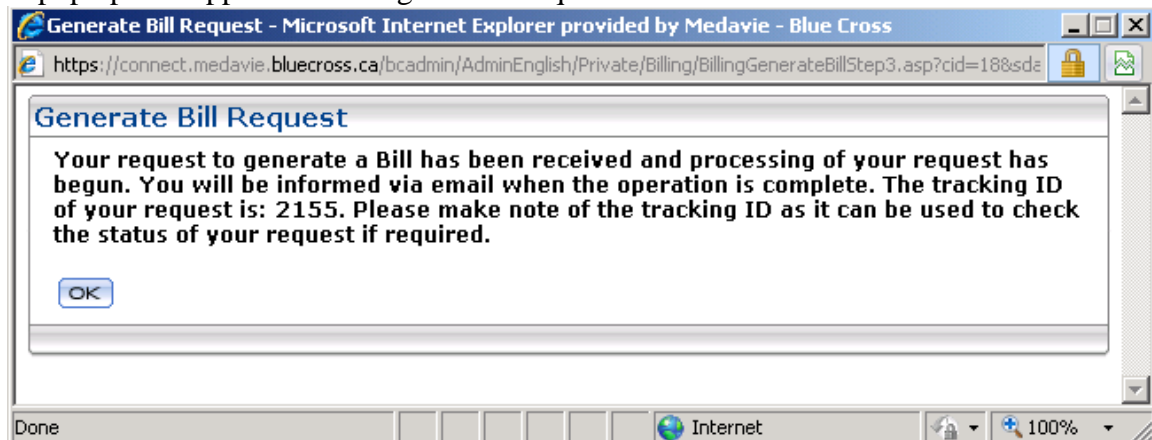


At the bottom of the page click on Generate Bill.

Manage Billing



A pop up will appear indicating that the request was received. Click on Ok.



Run a Billing/ Premium Export

Return to the Billing/Premium Export results by clicking on Next.



Click on Billing History.

Manage Billing

Blue Cross

The following policies are in effect for this carrier:

Policy	Covered Benefits
	HealthA, HealthB, HealthC, Employee Life Insurance, Basic Life Insurance, Optional Life Insurance, Spousal Life Insurance, Child Life Insurance, LTD, Employee Critical Illness, Spousal Critical Illness, Child Critical Illness, Basic Family AD&D Insurance, HCEA, Personal Account, Basic AD&D Insurance

Billing Period: May 2013

Back | **Billing History** | Generate Bill

You will now see your export range just requested.

Click on Download Bill

Generated bills for Blue Cross

Bill Periods	English Bill	
April 2013	Download Bill	
March 2013	Download Bill	
February 2013	Download Bill	

You can now Save the document, open and view your bill.

