

# Welcome to Benefits Manager

## Instruction Guide for Self-Administered Billing

Contents | [Next >](#)

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

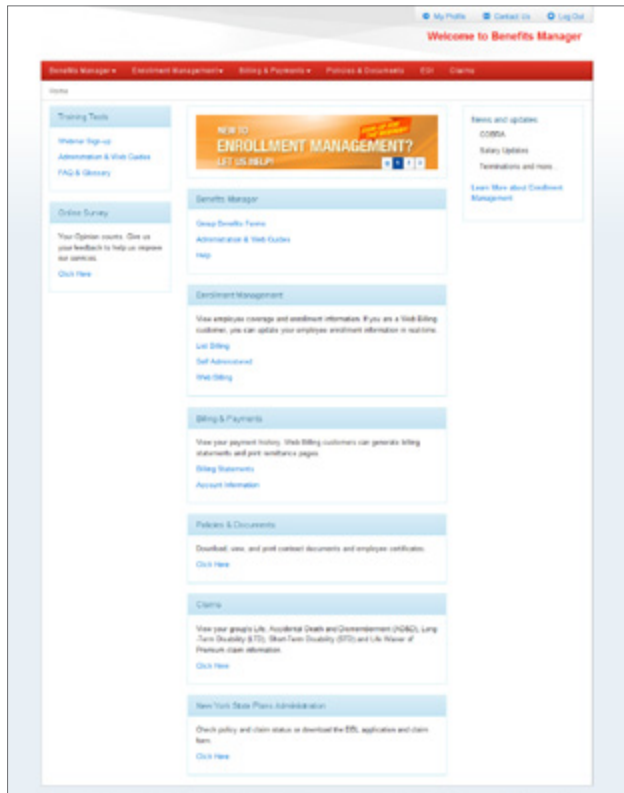


Diagram 1

## Contents:

### Section 1: Group Billing and Payment Information

Viewing your group's billing and payment activity ..... 3

### Section 2: Group Billing and Payment Information

Viewing your group's billing and payment activity ..... 4

### Section 3: Downloading Documents

View and download your group policies and documents ..... 5

### Section 4: Profile Management

Manage user information ..... 7

### Section 5: Help

Help ..... 8

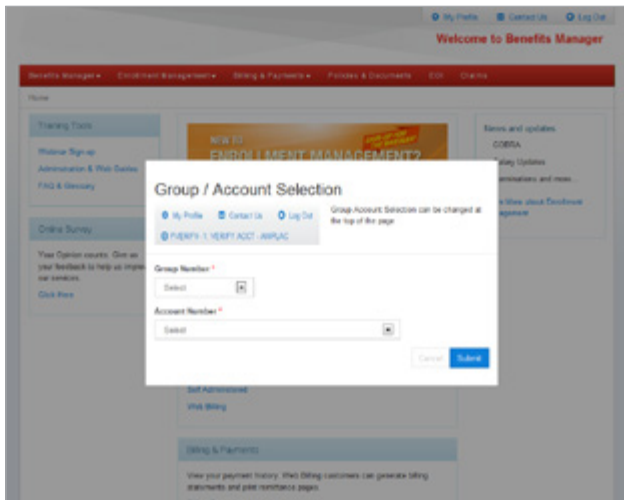



Diagram 2

## Section 1:

### Group Billing and Payment Information

**Step 1:** Select your group and account number.

 **Tip:** Multiple group/account customers have the option to select a different group/account in a pop up box and at the top right corner of the page.

**This concludes Section 1 of 5.**

**Click “Next” below to continue to Section 2 of Benefits Manager.**

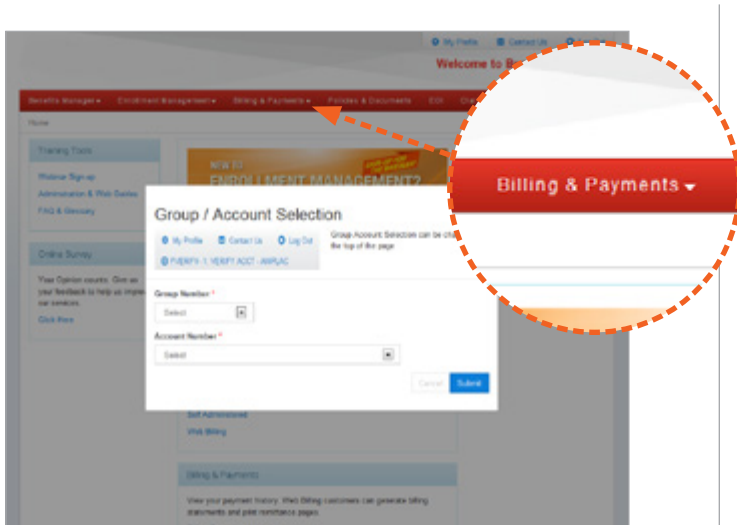


Diagram 2

## Section 2:

### Group Billing and Payment Information

#### Account Information:

This page displays Policyholder Detail:

- Billing Address
- Premium Paid Through (Date)
- Premium Last Applied (Date)
- Billing Frequency
- Effective Date
- Next Renewal Date
- Termination Date
- Termination Reason

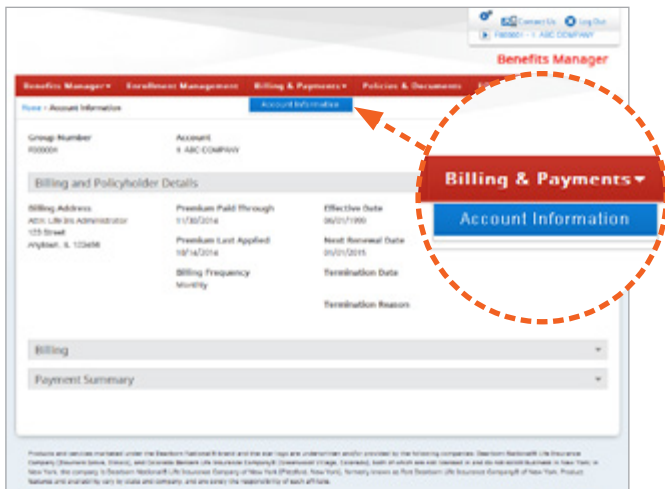


Diagram 3

Billing History and Payment Summary are also available on this page (Diagram 3).

**This concludes Section 2 of 5.**

**Click “Next” below to continue to Section 3 of Benefits Manager.**

## Section 3:

# Downloading Documents

To begin, click on Policies & Documents (Diagram 4)

**Step 1:** Select the desired Document and Product type, then click "Search" (Diagram 4).

**There are 5 Document Types to choose from:**

**Amendment** - a copy of any changes to your contract.

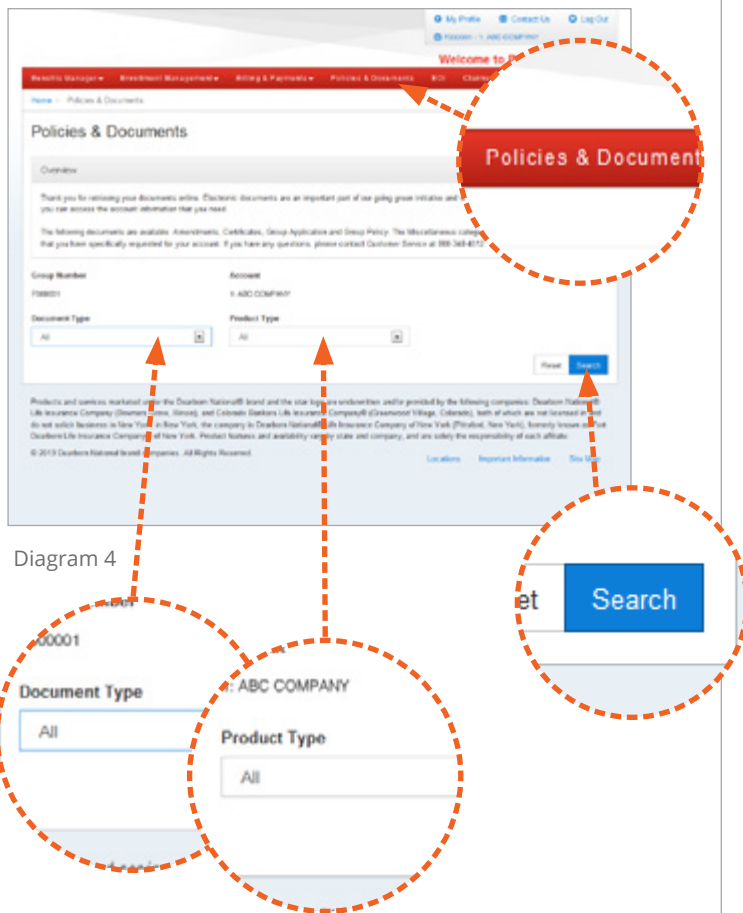
**Certificate** - a copy of your group certificate.

**Group Application** - a copy of your group's application.

**Group Policy** - a copy of your group policy.

**Rate Grid** - rate grids applicable to your group's coverage.

**Miscellaneous** - may contain enrollment forms or other group documentation.



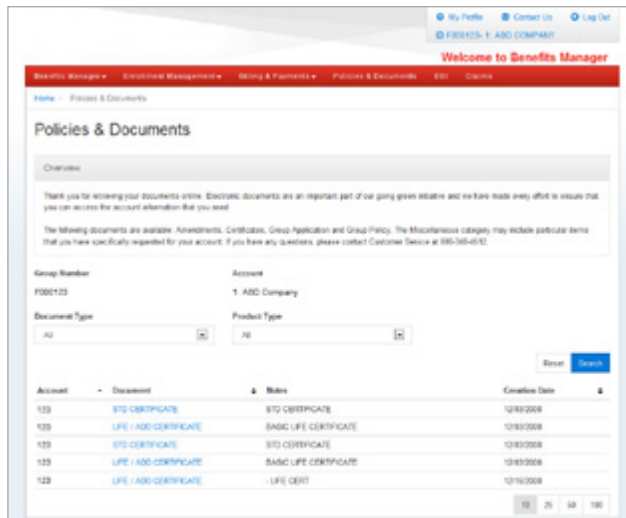


Diagram 5

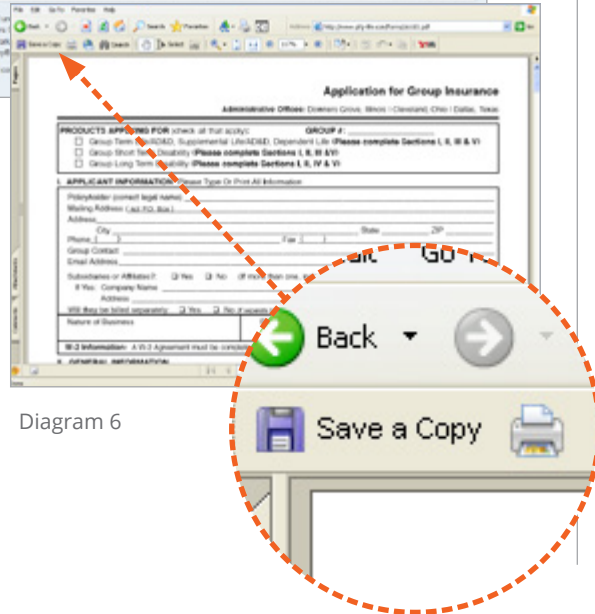



Diagram 6

 **Tip:** You can sort documents by Account Number, Document Notes and Creation Date (Diagram 5).

All documents are in PDF format and can be printed and/or downloaded.

 **Tip:** To print the document, click on the printer icon (Diagram 6). To download the document, click on the diskette icon and designate where you want to save the document (Diagram 6).

**This concludes Section 3 of 5.**

**Click "Next" below to continue to Section 4 of Benefits Manager.**

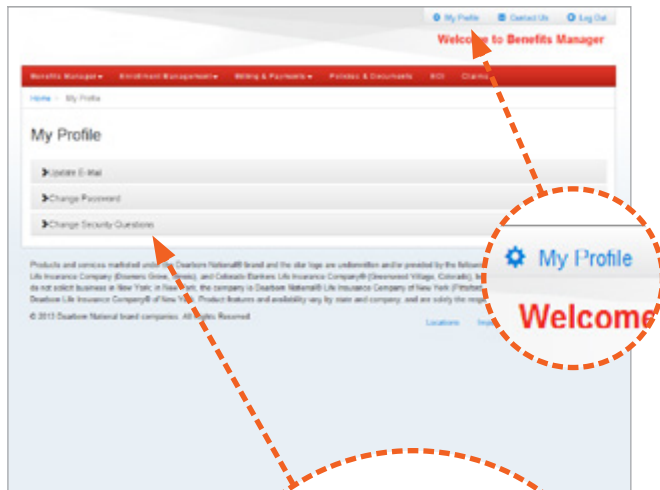
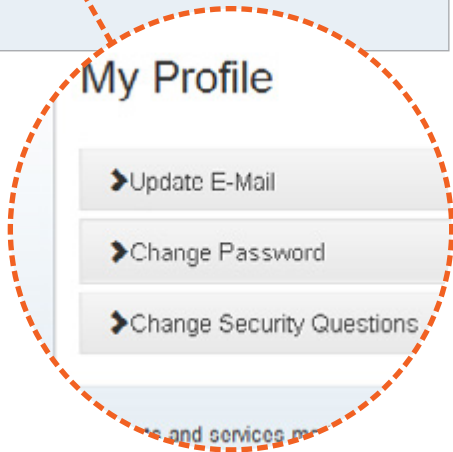


Diagram 10



## Section 4:

# Profile Management

**My Profile (Diagram 10) is where to manage user information.**

**There are 3 categories to choose from:**

- 1. Update E-mail** - Change the e-mail address we use as part of our Change Password verification process.
- 2. Change Password** - Change the password you use to access Benefits Manager.
- 3. Change Security Questions** - Manage the questions we will ask in case you forgot your password.

**This concludes Section 4 of 5.**

**Click “Next” below to continue to Section 5 of Benefits Manager.**

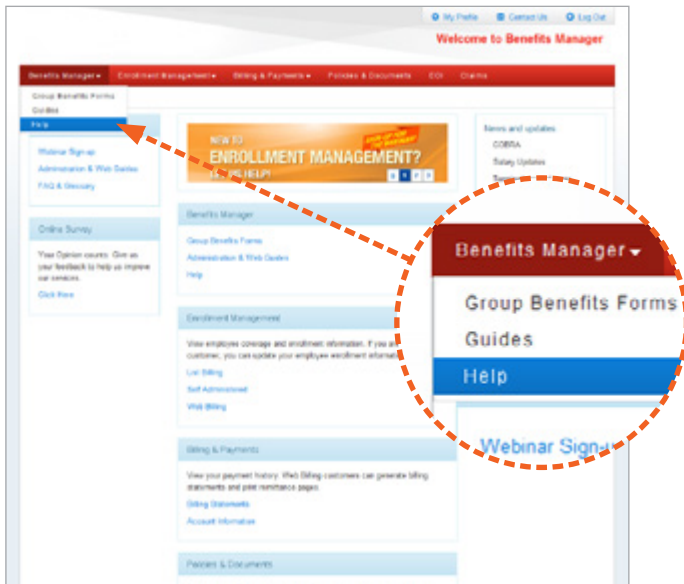


Diagram 11

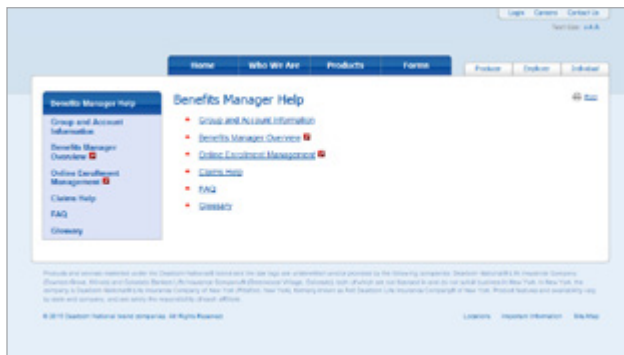


Diagram 12

## Section 5:

### Help and Frequently Asked Questions

If you need assistance click on “Help” from the submenu anywhere in Benefits Manager (Diagram 11).

The Help window (Diagram 12) contains 7 categories to choose from:

- |                                  |                |
|----------------------------------|----------------|
| 1. Help Main Menu                | 4. Claims Help |
| 2. Group and Account Information | 5. FAQ         |
| 3. Benefits Manager Overview     | 6. Glossary    |

This concludes Section 5 of 5.

Thank you for using Benefits Manager.