

Plan Administrator's Guide to Enrol-ME Online™



Group
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Enrol-ME
online™

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Enrol-ME Online™

Overview for Clients

GroupSource is pleased to present Enrol-ME Online™, an easy to use online tool that makes signing up your employees/members to their new benefits plan easy (for both of you)!

Enrolment is simple for you and your members.

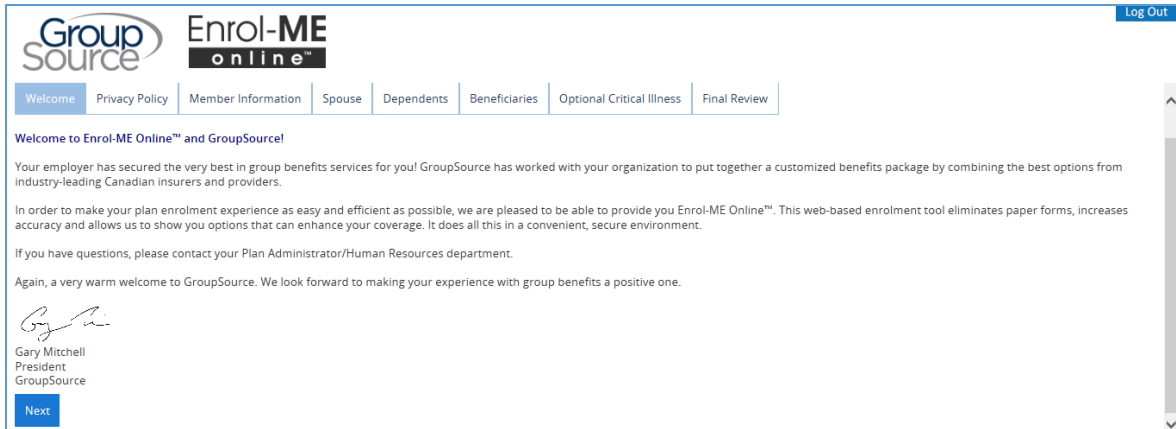
- You enter your new member's basic employment information in WEBS® Online Administration, our industry leading benefits administration system, and confirm their effective date. If you have a number of new members to enrol at one time, you can provide us with an Excel spreadsheet with the required information if that is easier for you.
- Once that information is entered into WEBS, the member will receive a welcome email with the Enrol-ME Online™ website link, a username and password.
- The member logs-in and completes their enrolment electronically.
- You as the Plan Administrator are able to log in to WEBS at any time to check the status of each member's enrolment and to access a PDF of their completed enrolment card.
- During the enrolment period, we will send members reminder emails if their enrolment is outstanding.

We are using an industry leading and highly secure electronic signature service on the enrolment forms. As it stands today, not all provinces will accept e-signatures for the beneficiary portion of the enrolment so in some cases the member will need to print off the completed form, sign and date it and return it to you. You'll be advised in WEBS, and also in an email update, which members need to return a signed form.

Online Enrolment for Members

From a member's point of view, their interaction with GroupSource starts when they receive an email inviting them to use the online enrolment tool, Enrol-ME Online™. The member should:

- Click on the Enrol-ME Online™ link provided in their customized email. Each member's link is unique.
- Enter their user name and password as shown in the email.
- A welcome screen appears with a message from our President, Gary Mitchell. The member moves through this screen and later screens by clicking Next to proceed.



- The member must Accept the privacy wording on the next screen to proceed with entering their personal data.
- The member will then enter their enrolment information in a series of screens. They move from field to field using the Tab button or using their mouse or touch screen device:
 - The Member Information screen - the member can correct their name if necessary and enter their address, phone and personal email as well as their selection for EHC and Dental if they are offered in that class.

- The Spouse screen asks if the member has a spouse and if so, requests information on the spouse such as their name and date of birth.
- The Dependent screen asks if the member has any dependents and if so, requests information on the dependents such as their name and date of birth. Dependents who

- are overage will be asked further questions to see if they are a full-time student or disabled.
- The beneficiary screen allows the member to designate a beneficiary.
- If Optional Critical Illness benefits are offered, a video will appear to provide more information on the coverage and the member can indicate if they would like the coverage for themselves, their spouse and their children. The costs for their coverage are clearly indicated.
- A final review screen appears for last minute changes. The member should click on Submit when they are finished their review.

Group Source **Enrol-ME online™**

Welcome | Privacy Policy | Member Information | Spouse | Dependents | Beneficiaries | Optional Critical Illness | **Final Review**

Final Review
Please review the information you entered and click "Submit" button when complete.

* required field

Member Information

First Name *

Last Name *

Middle Initial

Date of birth (e.g. 1980-12-25) *

Gender * Male Female

Address *

City *

Province *

[Save Progress](#) [Submit](#) [Privacy Policy](#) GroupSource.ca

- If the member is in a province where an electronic beneficiary designation is acceptable, they will be redirected to the eSignLife website where they will sign their enrolment; otherwise, the member is asked to print their enrolment card, sign and date it and return it to their Plan Administrator.

WEBS and eSignLife will also email the member to advise of any requirements for completion once the member indicates their data entry is completed.

The Enrolment Process

WEBS Menu Item – Online Enrolment Management

Everything you need for online enrolment is found under the Main Menu’s Online Enrolment Management menu item. Here, you’ll be able to view a summary screen showing your members along with their progress in the enrolment, send invitations to new members (if your plan is already setup) and as well, there is an option to print the completed enrolment forms if you require them for your files. If you need to print more than one enrolment form at a time, you may find the Reporting option convenient.


When a member completes their enrolment online, we will then transfer their member record to the List All Enrolled Employees screen where they will receive a PIN/certificate number and be set up for their applicable benefits. All further changes to that member during the life of their coverage will be made through List All Enrolled Employees. The Online Enrolment Management screens capture the information from their initial online enrolment only.

The sub- menu option Member Management will show a screen similar to the one below.

[Main Menu](#) | [List all Enrolled Employees](#) | [Online Enrolment Management](#)

Member Management


Client: Z99 - (Active) ABC Company ▼



Export Member List to CSV

[Create A New Member](#)

Toggle Filtering

ID	First Name	Last Name ↕	Class	Enrolment Status	Enrolment Status Effective Date	Last Date Invitation Sent	Paper Signature required?	Enrolment Form
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	on <input type="text"/> on and after <input type="text"/>	on <input type="text"/> on and after <input type="text"/>	<input type="text"/>	
Z99GH00017	Sarah	Jones	01	In progress	2017-02-08	2017-02-08	No	
Z99GH00018	Susanna	Jones	01	Completed	2017-02-08	2017-02-08	Yes, by member/spx	

You will see a list of your members who were set up for online enrolment, along with their class, Enrolment ID, Enrolment Status and the Effective Date of that status, the last date they received an enrolment invitation, and whether or not a paper signature is required by the member and spouse. If the member has completed the enrolment, a link to a PDF of their signed enrolment card will show as well.

Also on this screen is an icon labeled Export Member List to CSV. Clicking on this icon allows you to export the member data on this screen to a csv file. The file includes the same columns as shown on the screen along with your ledger code.

Please note that the member's ID is not their ID for claims submission, it is a tracking number used only for online enrolment. Once they complete their enrolment they are assigned a PIN or certificate number that will appear on their oneCard and on your billing statement. You can see this on the List All Enrolled Employees screen.

As a default, the data in this table will be sorted by the member's Enrolment ID. You can also sort by other options by clicking on the column heading.

You can filter the list by entering a value in the white box below each column headings. For example if you only want to see members in class 01, enter 01 in the box underneath the Class heading. If you wish to only view members who haven't started their enrolment, select Not Started from the dropdown white box under Enrolment Status. To remove the filter, click on the small black X at the right side of the box and the list will refresh to include all members.

Two of the filters are marked as 'on' and 'on and after'. If you enter a date in the 'on' filter, the list will filter to include only members who have a date that exactly matches the date you entered. If you enter a date in the 'on and after' filter, the list will refresh to show any members with a date is that on or later than the date you entered.

The Enrolment Status for a member will be one of the following options and you can see the date they attained this status by looking in the Enrolment Status Effective Date column:

- Pending – the invitation has not been sent to the member yet
- Not started – the email was sent to the member but they haven't logged in to Enrol-ME Online™ yet
- Paper Enrolment Required – in this case the member has usually either declined the privacy wording or an email was not provided. This status will also appear if the member did not esign the form before the enrolment deadline.
- In progress – the member has logged in and accepted the privacy wording however, they have not saved their full enrolment yet.
- Completed - the member has saved their full enrolment form.
- Paper Enrolment Completed – we received a paper enrolment form for this member
- Did not Enrol – Identifies a member who did not enroll through Enrol-ME or on a paper enrolment.

The Paper Signature required column indicates if you need to obtain a signed copy of the enrolment form. It will indicate who needs to sign the enrolment form:

- Member – this would be required because the member lives in a province that does not accept electronic designation of beneficiaries. **It is very important that you obtain this signed form from the member as it is required in case of a life insurance claim.** GroupSource does not need to receive a copy or the original of this signed form.

- Spouse – the spouse has applied for the Optional Critical Illness coverage (note that this may not be offered in all plans). Their application can only be processed once you forward us a copy of the signed form.
- Member/Spouse – both situations above apply, the member is in a province that doesn't accept electronic signatures and the spouse has applied for the Optional Critical Illness benefit. Please obtain the signed form from the member and forward us a copy of the spouse's signed form so that we may process their Optional Critical Illness application.

Adding a New Member for Online Enrolment

To add a new member so that you can send them an invitation to complete their enrolment online, click on the [Create a New Member](#) link near the top left of the summary chart and a new screen will appear:

The screenshot shows the 'Create New Member' form within the Enrol-ME online system. The breadcrumb trail at the top reads: [Main Menu](#) | [Online Enrolment Management](#) | [Member Management](#). The form title is 'Create New Member'. The fields are as follows:

- Member ID:** (Label)
- Name:** Three text input fields: 'First Name' (mandatory, marked with a red asterisk), 'Initial', and 'Last Name' (mandatory, marked with a red asterisk).
- Class:** A dropdown menu (mandatory, marked with a red asterisk).
- Employment Date:** A date picker (mandatory, marked with a red asterisk).
- Effective Date of Coverage:** A text field containing 'Will be calculated.'
- Occupation:** A text input field (mandatory, marked with a red asterisk).
- Annual Earnings:** A text input field with a '\$' symbol on the left (mandatory, marked with a red asterisk).
- Primary Email:** A text input field (mandatory, marked with a red asterisk).
- Report Class:** A text input field.
- Cost Code:** A text input field.

This new screen is where you provide some initial information regarding the new member and trigger the email invitation. The fields are very similar to those on the EE screen in the List all Enrolled Employees section.

To enter the information, you can click Tab to move from field to field or use your mouse. Fields that are mandatory are marked with a red asterisk. Once the member has been created here, you will only

be able to view the information on this screen. If you require an update to the information, please contact your Benefits Administrator.

The following provides some information regarding the type of data you should enter in the fields:

Name - Enter the First Name first, then Initial if known and Last Name in the three fields provided.

Class - Choose a class from the dropdown list. If the class you require is not indicated, please contact us.

Employment Date - This date is used to calculate the Effective Date of Coverage. This date is usually when the member first commenced employment. However, if the member has been working less than the minimum number of hours required to be eligible for benefits or did not previously meet the eligibility requirements, this field should indicate the first date the member met the eligibility requirements.

Effective Date of Coverage - WEBS will automatically calculate the effective date of coverage using the member's Employment Date and Class once you have saved the information on this screen. This field will reflect the earliest effective date of all eligible (mandatory) benefits.

Occupation - The member's occupation or title

Annual Earnings - An amount must be entered if Group Life and/or disability benefit levels are determined by the salary, otherwise the field will accept '0'.

Primary Email - This is the email address where the invitation will be sent. Two or more members cannot share the same email address if they are to use online enrolment.

Report Class - If your monthly billing statement is sorted by Report Class, this field can be completed. Please contact your Benefits Administrator if you need to verify if this field is required. It is not a mandatory field during the initial enrolment.

Cost Code - This field is also known as the division and is required by the insurer. Your Benefits Administrator can provide the cost codes for your organization. It is not a mandatory field during the initial enrolment.

Employee # - This is an optional field but can be used for your own purposes. The value in this field will appear on your billing statement.

FTE percent - This is an optional field used by some employers to identify members working less than full-time. Up to 2 decimal places will be accepted. For example, enter 45.57 for someone who has a .4557 FTE.

Login Expiration Date - This field will default to 5 calendar days from the current date but you can change it if you want to give the member a longer or shorter time in which to complete their enrolment. The member will be advised of this expiration date in the email invitation they receive.

Once you have entered all required information, click on Continue. An error message will appear if any required information is missing or requires correction.

Confirming the Effective Date

A pop up screen will ask you to confirm if the Effective Date that WEBS calculated is what you expected for this member.

Please confirm "Effective Date"

The effective date of coverage for this member is 2016-12-01.

If the effective date of coverage is correct, please select "Yes" and then click "Continue" button. This will create the online enrolment form for this member and send him/her an email invitation.

If the effective date of coverage is not correct, please select "No" and provide the effective date of coverage for this member along with the reason for the difference and then click "Continue" button. A Benefit Administrator will be notified and review this record prior to sending out the email invitation.

Please click "Cancel" button to go back to the previous screen.

I confirm the effective date of coverage is correct. Yes No *

If you indicate that it is correct, then the invitation email will be sent immediately to the member. If you indicate the Effective Date is incorrect, then a new field will appear and you will be asked to enter the date you expected and a reason for the difference. For example, you may want to waive the waiting period for a key member. A Benefits Administrator will review the record and either contact you for more information or trigger the email invitation themselves.

Once you respond to the pop-up screen's effective date question and click Continue, a confirmation message will appear on the Member Data screen with one of the following messages:

- The invitation to the online enrolment form has been sent to this member; or
- Your Benefits Administrator has been notified and will review this enrolment shortly.

To leave this screen, you can click Close or one of the links at the top of the screen.

Adding Multiple Members Using a Spreadsheet

If you have a number of members to enrol at one time, GroupSource will provide you with a spreadsheet template that has the information required including the member's first and last name, email address and class. There will also be other columns for the employment date, occupation, annual salary, report class and employee number. These additional fields are not required to start the online enrolment but several are required for GroupSource to administer their benefits. You may find it easier to include them in the original file rather than send two separate files.

The email address is used to send out the member's customized online enrolment invitation. It cannot be a shared email with other members. If a member does not have an email address, this field can be left blank; however, they will not be able to participate in the online enrolment and must complete a paper enrolment. A copy of their paper enrolment must be provided to our office to enrol the member for benefits.

GroupSource will upload this spreadsheet into WEBS in the Member Management table which will generate customized emails to your members.

During the Enrolment

Reviewing the Employment Information for a member

To view the specifics of an individual member such as their annual earnings or employment date at the time of their enrolment, click on their ID and a new screen will appear with those details. If you need to change any information on this screen, please contact your Benefits Administrator.

Resending an Invitation

Occasionally a member may need to obtain new log in credentials as they lost the original email. Please contact GroupSource and we will send a new invitation to the member.

Removing Members

Sometimes a member does not need to be enrolled in benefits as they have become ineligible for reasons such as termination of employment or reduction in hours. In this situation, please contact your Benefits Administrator who will deactivate their enrolment access.

Paper Enrolment

Using Enrol-ME Online™ is not mandatory although it is preferred because of its convenience. If a member contacts you to request a paper enrolment form, please provide the form and then return the completed form to GroupSource (copy only, originals must be kept at your office). Once a member has been marked as a paper enrolment, they are not able to complete an online enrolment.

Emails

The following shows the emails that are sent to you or members during the enrolment process.

Invitation Email to the Member

Hi Julia Singh,

Welcome to GroupSource. Your employer, ABC Company, wanted the very best employee benefits for you and we are pleased to have been selected to provide exactly that!

In order to make signing up for your new benefits as easy as possible, GroupSource provides Enrol-ME Online™, a simple and intuitive online signup. Please note that you must complete and submit this enrolment in order to activate your benefits coverage and have claims paid.

Please follow this [link](#) to open and then complete your online enrolment. (If the link is not clickable, please copy and paste the address below into your web browser):

<https://enrol.groupsource.ca/?MemberGuid=123456>

Your username is: A00001GS00001

Your password is: x1y2z3a4

Please note that the log-in credentials provided above will expire on 2016-12-30 so you must complete your online enrolment prior to this date.

Once you've completed and submitted your online enrolment, your employer will work with us at GroupSource to finalize your setup, and ensure you receive your Welcome Package with all the details of your new and comprehensive employee benefits plan.

We look forward to setting you up with your customized benefit coverage, and servicing your needs in the years to come. Should you have any questions at all, or if you would prefer to complete your enrolment using a paper enrolment form, please contact your Plan Administrator/Human Resources department.

Gary Mitchell, President

GroupSource.ca

Reminder Email to the Member

A member will receive a reminder email only if they have not finished their enrolment.

Hi Julia Singh

We are following up to remind you that your access to Enrol-ME Online™, your online group benefits Enrolment Form, expires on 2016-12-30. Please ensure you login before the expiry date as an Enrolment Form must be submitted in order for you to be covered and to ensure that your claims are paid.

Enrolling is easy! Please complete your online Enrolment Form using your username and password.

We look forward to setting you up with your new group benefits coverage! If you have questions about your enrolment, please contact your Plan Administrator/Human Resources Department.

Thank you for choosing GroupSource!

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Confirmation Email to the Plan Administrator when an Enrolment is Completed

You will receive an email advising you that the member has completed their enrolment. The email contents vary but it will advise if any further action is required such as obtaining a signature on the paper enrolment form to validate the beneficiary designation.

Reminder Email to the Plan Administrator during the Plan's Initial Enrolment Period

Plan Administrators will receive an email advising which members need to return a signed and dated form as they are in provinces that do not accept electronic signature and/or their spouse has applied for the Optional Critical Illness benefit.

HI RICHARD,

Your organization's online enrolment is going to expire on 2016-07-30. The following members have completed the online portion of the enrolment and an original signature on the printed enrolment form is required from the member and/or the spouse as indicated below.

Where the member's signature is required, please ensure that you receive and keep on file a printed enrolment form with their original signature from each of these members. Their original signature is required as this printed form will be a legal document in the case of their death. Without their original signature, their beneficiary designation will not be valid.

Where a spouse's signature is required, it is because the member has requested that their spouse be covered for the Optional Critical Illness coverage. A copy of the printed enrolment form with the original signature of spouse must be returned to our office so that we may set up this coverage.

Member ID	First Name	Last Name	Email	Paper Signature Required
ABCGS00003	Adrian	Jones	ajones@sample.ca	Yes, by spouse
ABCGS00005	Don	Murphy	donmurphy@sample.ca	Yes, by member/spouse
ABCGS00017	Sam	Singh	samsingh@sample.ca	Yes, by member

Enrolment Completion - Email to the Member

Once the member submits the enrolment form and it is determined that they must sign the form on paper, an email is sent to remind the member:

Hi Viktor,

Thanks for completing your group benefits application in our web-based tool, Enrol-ME Online™!

You must now print and sign your enrolment form and return it to your Plan Administrator/Human Resource Department. Your original signature is required as this printed form will be a legal document in the case of your death. Without your original signature, your beneficiary designation will not be valid. In this case, your life insurance would be paid to your estate and will be subject to creditors.

If you do not have access to a printer, please contact your Plan Administrator/Human Resources Department and a copy of your form will be provided.

Your employer will now work with GroupSource to finalize your setup, and ensure that you receive the Welcome Package with all the details of your new, customized group benefits plan.

Should you have any questions, please contact your Plan Administrator/Human Resources Department.

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If the member's spouse has applied for the Optional Critical Illness benefit, then this email will be sent to advise them to have their spouse sign the spouse's section of the enrolment card and return it to their Plan Administrator:

Hi Viktor,

Thanks for completing your group benefits application in our web-based tool, Enrol-ME Online™!

The final step in your enrolment is to print a copy of your Enrolment Form and have your spouse sign the 'Spouse Application for Optional Critical Illness' page in order to apply for Optional Critical Illness coverage.

You must return the Enrolment Form with your spouse's signature to your Plan Administrator/Human Resources Department in order for your spouse to obtain the Critical Illness coverage.

If you do not have access to a printer, please contact your Plan Administrator/Human Resources Department and a copy of your form will be provided.

Should you have any questions, please contact your Plan Administrator/Human Resources Department.

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Email when an Electronic Signature is required

An email will be sent to the member if they can sign their form electronically:

Hi John

Thanks for completing your group benefits application in Enrol-ME Online! If you have not already done so, you must electronically sign your Enrolment Form.

Should you have any questions, please contact your Plan Administrator/Human Resources Department.

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An email will also be sent from eSignLive to the member thanking them for completing their enrolment and their esignature

Thanks for completing your group benefits application in Enrol-ME Online™!

Now that you have completed your online Enrolment, your employer will work with GroupSource to finalize your setup, and ensure that you receive the Welcome Package with all the details of your new, customized group benefits plan.

Should you have any questions, please contact your Plan Administrator/Human Resources Department.

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Reporting

You have the option to print all the completed enrolment forms by accessing the Reporting menu item. This report allows you to combine the completed enrolment forms into one PDF file for ease of printing or review.

[Main Menu](#) | [Online Enrolment Management](#)

Reporting

Report: Completed Enrolment Forms ▼

Select

Client: ZXD - Online Enrolment (Xpertdoc) ▼

Class: All ▼

Report Class: All ▼

Enrolment Status: All ▼

Member:

All

Akmens, Tammy

Bell, Anna

Black, Jack

Byrne, Sara

Chan, Abdul

Chan, Rosy

Colon, Rosalyn

Craig, Brenda

Deli, Larissa

(Note: Hold 'Shift' or 'Ctrl' key and use mouse to select multiple member)

Sorted By: Class, Member Last Name, First Name ▼

Generate

You can filter the list by class, report class, enrolment status and member if desired. As selections are made in class, report class etc., the options presented in the remainder of the filter fields will adjust per those selections. Sorting options are also presented.

When the selections have been made, click **Generate** to produce the file. There is a limit of 100 individual members in a file. If WEBS advises that the list of members is over 100, use **Ctrl-Left Click** to highlight a subset of the members and click **Generate** again.