

Benefit™ provides superior value, not only in product features, but also in ease-of-use, pricing and customer support. With Benefit™, you will not only have a total technology solution for managing employee benefits, but you will also have an enterprise-level software solution for your internal business operations, expenses, customers, vendors and contacts.

Employee Roles and Features

Your system administrator has the capability to assign one of three roles to each of your employees at the individual user level. The Enrollment Only Role can be set-up for all employees or by class, such as hourly or salaried. The Employee Role allows employees, on a customizable basis, expanded access including customer relationship management. Please note that the System Administrator can change employee user roles at any time.

Enrollment Only

- Online Plan Enrollment and Employee Self Service
- View Benefit Statements and Summary
- View Company Documents
- View Company Bulletin Board Postings
- Manage Attendance

Employee (All Enrollment Only features plus the following)

- Online Dashboard
- Customer Relationship Manager
- Enrollment Manager
- Document Manager
- COBRA, Leave of Absence, and Disability Management
- Online Calendar and Activities
- Expense Management
- Reports

System Administrator (All Employee features plus the following)

- Manage Employee Login Access
- Security Setup
- System Usage Report
- Manage Logo and Colors
- Create Company Bulletin Board Postings

Customer Relationship Management

Use Benefit™'s CRM tool to manage all customer, carrier, and vendor information from a single location. This includes client activities, client profiles, expenses, and proposals. Vendor information includes maintenance and service agreements as well as contact management information.

Calendar and Activity Tracking

Benefit™ offers an online shared calendar, similar to Microsoft Outlook™, that can be used to track activities that automatically map to client folders. You can also schedule recurring activities and reminders. Reminders can be sent to your email inbox or mobile phone.

Attendance Tracking

UBenefit™ has customizable attendance tracking and reporting. You will also have the ability to generate reports that you can send electronically to your payroll processor.

Expense Management

With UBenefit™, you can manage and track employee expenses. Unit-based expenses, such as mileage, are easily calculated and tracked within a client folder.

Company Bulletin Board

Use this feature to communicate company-wide event notices and communications.

Ease of Use & Branding

UBenefit™'s collaborative portal system has been designed so your employees can manage all of their daily activities from their own portal. Your portal can be customized with your own logo and colors.

Technology Support

Customized for your employees every screen offers online help with easy to use guidance. UBenefit™ also offers an extensive online glossary and benefits encyclopedia, with over 100 pages of searchable terms and definitions.

UBenefit™ can generate reports that can easily be accessed and used by Microsoft Office™ products. However, although UBenefit™'s Calendar and Activity Manager has many similar features, such as company-wide, shared calendaring and contacts, there is currently no synchronization or integration service to or from Microsoft Outlook™'s Calendar.

Human Resource Management

Track and manage the new hire process with the use of the following online forms: state child support disclosure form, new hire application, I-9, and W-4 as well as any specific company forms.

Dashboard

UBenefit™'s Dashboard feature keeps your benefits administrator informed, alerting them to relevant events pertaining to any of your employees. The Dashboard appears as soon as you log in and/or can automatically be emailed to you. You can manage your entire workflow from the customizable Dashboard. Track changes to enrollment options and demographic information, COBRA and leave alerts, employee age changes, and daily activities. You may also specify when a task has been completed and run reports to see when an employee has completed certain tasks.

Employee Personal Folder

You can use the employee personal folder to store: Benefit notices, Benefit statements, Compensation tracking, COBRA/Lay-off/Leave of Absence notices, Performance evaluations, QDRO/QMCSO notices, and Protected Health Information (PHI) release authorization.

Employee Imports

UBenefit™ allows for quick and flexible data imports via Microsoft Excel™ documents. The following employee data can be imported: Name (First, Middle, Last), Company Location, Address 1, Address 2, City, State, Zip Code, County, Country, Home Phone, Work Phone, Fax, Cell, Email, Employment Status, Job Class, Job Title, Employee Id #, Date of Hire, Hours Per Week, Salary, Hourly, Pay Cycle, SSN, Date of Birth, Sex, Tobacco User, Marital Status, Vacation Days, Paid Time Off Days, Sick Leave Days, Salary Continuation Days, User Name, Password, PPC Numbers, Employee Notes, Dependents, Spouse Name, Spouse Date of Birth, Spouse SSN, Spouse Sex, Spouse Tobacco User, Spouse PPC Numbers, Children, Child Name, Child Date of Birth, Child SSN, Child Sex, Child PPC Numbers.

You also have the ability to add 10 employees at a time using UBenefit™'s Mass Add Feature.

Reports and Scheduled Reporting

UBenefit™ offers many useful reports. Most reports can be scheduled to run automatically and emailed to any administrator. The reports can also be created in the following versions: printable, Adobe Acrobat™ PDF, and a Microsoft Excel™ export.

Examples of some reports include: Census, Census Changes, Enrollment Changes, Plan Census, Premium Reconciliation, Activities, Attendance, Expenses, COBRA Alerts, System Usage, and Payroll.

UBenefit™ is currently working on an Ad-Hoc Reporting feature that will give you the ability to create custom reports, based on any criteria in the system. It will be possible to save these reports, as well as provide security restrictions that specify who can run them.

Security

UBenefit™ deploys proven, up-to-date security technologies and always evaluates emerging security developments and threats.

UBenefit™ is a hosted, web-based portal service and includes the appropriate security measures to protect against unauthorized access to or unauthorized alteration, disclosure, or destruction of data. UBenefit™ has security measures in place to help protect against the loss, misuse, and alteration of the data under our control. When your site is accessed using a Web browser, 128-bit Secure Socket Layer (SSL) technology protects information using both server authentication and data encryption to help ensure that data is safe, secure, and available only to you. UBenefit™ also implements an advanced security method based on dynamic data and encoded URL identifications, and hosts the site in a secure server environment that uses a firewall and other advanced technology to prevent interference or access from outside intruders. UBenefit™ provides unique user names and passwords that must be entered each time a user logs on. These safeguards help prevent unauthorized access, maintain data accuracy, and ensure the appropriate use of data. In addition, we monitor all firewall logs for security threats and to help administer and improve our service. All data is backed up multiple times per day to a secure and remote location.


You also have control over who can access what data, including: compensation, employee information, and company documents. They can also specify user names and passwords, create security groups, and monitor system usage.

Plan Enrollment

Small Group Enrollment with Health Statement

If you are a small employer, your Employees enroll in eligible plans using a health statement configuration tool with system-populated employee information that results in easy to read, fully populated, carrier-specific forms. These forms can be printed and signed or transmitted electronically with a digital signature.

Carrier Specific Enrollment Forms

 **Benefit**™'s carrier approved library of enrollment forms currently includes:

Minnesota:

BlueCross BlueShield (2-50, 51+)
Delta Dental (2-50, 51+)
Medica (2-50, 51+)
Health Partners (2-50, 51+)
Preferred One (2-50, 51+)
Generic Enrollment Form

Wisconsin:

State required small group enrollment and health statement form (2-50)
Generic Enrollment Form

Indiana:

American Century (2-50)
Anthem (2-19, 20-50)
Consumers Life (2-9, 10-50)
Humana (2-9, 10-50)
Generic Enrollment Form

Illinois:

Aetna (2-50, 51+)
BlueCross BlueShield (2-50, 51+)
Humana (2-25, 26-50, 51+)
United Healthcare (2-25, 26-50, 51+)
Generic Enrollment Form

HSA Enrollment:

BlueCross BlueShield of Minnesota
Generic Enrollment Form

Generic Enrollment

 **Benefit**™'s generic enrollment form with optional health statement can be used for all carriers.

Flexible Spending Account (FSA) Plan Enrollment

Employees can specify their contribution amounts and print enrollment forms online.

Health Spending Account (HSA) Plan Enrollment

Employees enrolled in High Deductible Health Plans may specify their contribution amounts and print enrollment forms online.

Enrollment Manager

An employer can use this tool to enroll employees in eligible plans. You can also manage COBRA, disability, leaves of absence, and lay-offs.

Benefit Statements

Viewable at any time and are automatically adjusted whenever a change occurs (e.g. salary increase or age change).

Spanish Translation

The entire employee experience and health statement enrollment process is available in both English and Spanish.

Plan Self-Administration

Customizable Plan Building

Build customized benefit plans for multiple employer locations and employee classes. Breakouts by budget center, business unit, division, and location are also possible.

Employee Eligibility Maintenance

Each plan can be self-administered including employee additions, terminations, and changes.

Plan Premium Reconciliation

A system-generated plan premium report can be used to monitor enrollment changes and plan premium statements to the carriers.

COBRA / State Continuation Administration

COBRA and State Continuation administration is automatically prompted whenever a triggering event occurs. This includes customizable system-prompted notifications, coupons, and premium tracking tools.

Plan Document Repository

Use the Plan Document Repository to organize, store, and view carrier SPDs, contracts, 5500's, claims and utilization reports, plan financial information, business associate agreements, and risk management information.

Plan Reports

Plan reports include: Census, Census Changes (life and work events), Premium Reconciliation, and Benefit Summaries.

Protected Health Information (PHI) Tracking

Benefit™ automatically tracks the date and time someone views an employee's protected health information. Reports can also be generated.

Absence Management

Use Benefit™ to manage FMLA, Disability, USERRA, and all other types of leaves and lay-offs.

Employee Benefit Self Service

Everyone benefits from Employee Self Service. Employees will be able to manage their plan enrollment, beneficiary changes, life event changes, and personal demographic changes without burdening their HR department.

Employee Health Care Planner

This private and secure feature offers employees a tool to manage their own and their family's personal and health profiles. Information an employee may track includes: personal and family medical records, health statements, health expenses and reimbursements, and prescription drugs. Group insurance health statements are automatically archived.

Contact your broker for more information!



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