

Agency

Enterprise Business Management

Customer Relationship Management (CRM)

- Client Activities
- Client Profile
- Client Documents Folder
- Client Expenses

Employee Business Center

- Calendar and Activity Management
- Company Bulletin Board
- Expense Management
- Company Documents Folder
- Employee Dash Board – Daily alerts to client activities and changes including enrollment changes, age changes, COBRA and leaves of absence.

Client Commission Tracking

State Licensing

Carrier Appointments

Continuing Education Requirements

Location-Specific

Salesperson

Client Benefit Management

Plan Marketing

- Small Group Health Rate Calculations
- Plan Template Library – Carrier-Specific Plan Provisions and Rates
- Request for Proposal Format including Plan and Rate Comparisons

Plan Enrollment

- Generic and Carrier-Specific forms including System-Populated Health Statements – also with Spanish Translation
- Employee Benefit Statements
- Plan Documents Folder

Plan Administration

- Eligibility Maintenance
- Premium Reconciliation
- COBRA – Notices, Premium Tracking Reports
- Absence Management
- Document Repository
- PHI Tracking and Reporting

UBenefit™ Marketing

- Employer Demo
- Client Portal Activation

UBenefit™ Client Billing System

- Customizable by client
- Automatically generated monthly with usage report

Client

Image-Branded Enterprise Application

Benefit Management

- Location-Specific
- Employee Benefit Self-Service
- Employee Healthcare Planner
- Employer Enrollment and/or Health Statement Archive
- Employee Data Imports Via Excel Documents

Human Resource Management

- Benefit Administrator – Dashboard - Daily alerts to employee benefit changes including enrollment changes, age changes, COBRA and leave(s) of absence.
- New Hire Processing
- Company Document Folder
- Attendance Reporting
- Labor Law Postings
- Employee Personnel Folder

Customer Relationship Management (CRM)

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Employee Business Center

- Each client's system administrator can assign employee access (role) on an individual employee basis and can restrict access to Enrollment Only.
- Calendar and Activity Management
- Company Bulletin Board
- Expense Management
- Company Documents Folder

