GROUP ADMINISTRATOR USER GUIDE MASTER

XYZ COMPANY

Group Administrator User Guide

Master

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Chapter 1:
Group Administration Menu

The Group Administration menu includes functions that manage the organizations and users within XYZ. These Group Administration functions are generally available only to users who are responsible for creation or maintenance of the XYZ site.

Add Organization

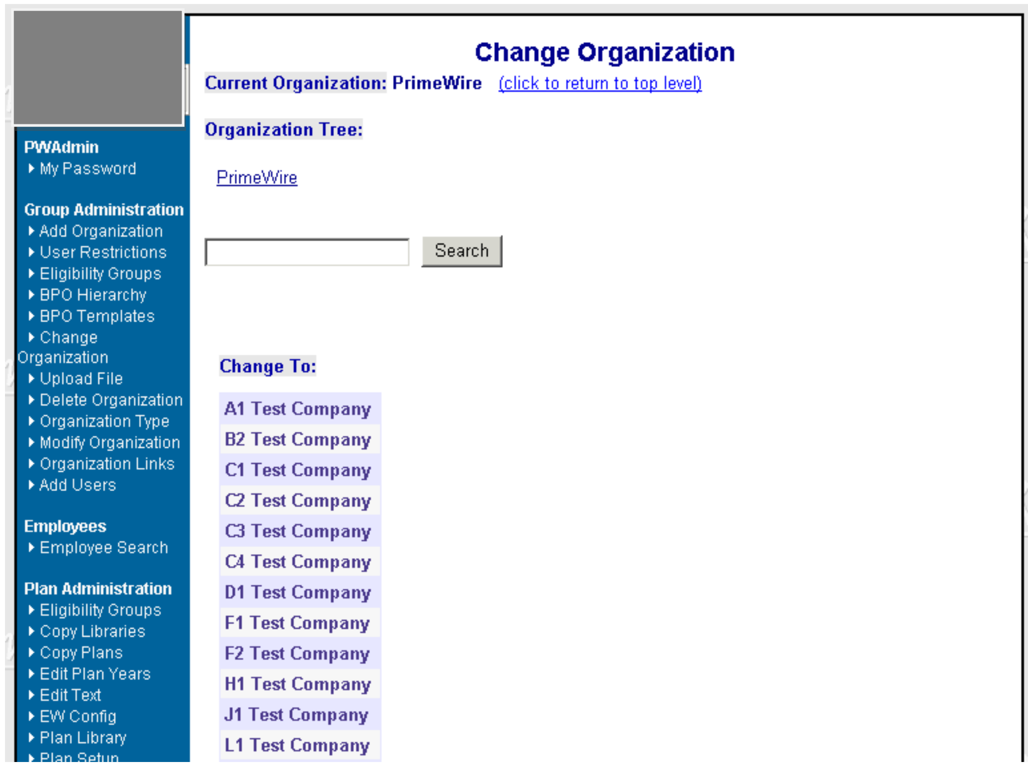
The first step in creating an organization is to add the organization. You may add organizations via electronic data or manually via the XYZ web interface.

If you want to add organizations via electronic data, see Appendix A for data specifications.

To add an organization manually, follow the procedure outlined below.

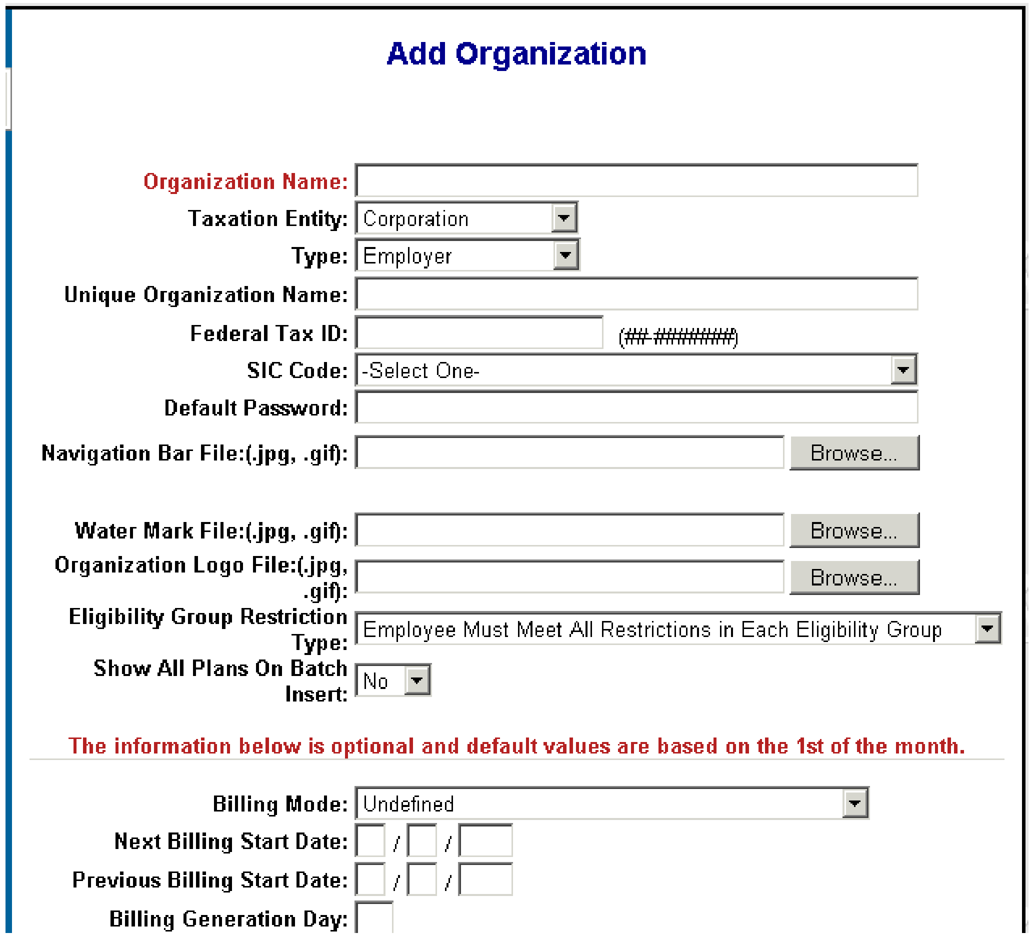
1. Open the organization under which you want to create an Employer or BPO.

   Note: The name of the organization that is open is displayed at the top of the navigation bar.



2. From the Group Administration menu in the left column, click Add Organization. The Add Organization window will be displayed.

Note: Only fields in **RED** are required.



3. On the Add Organization window, enter the Organization Name.

4. Select the Taxation Entity from the drop-down menu.

5. Select the Type of organization from the drop-down menu.

Note: Do not use "BPO" in this field to create a BPO. To create a BPO:

Add the organization as an employer.

Copy templates and links, from an existing BPO, into the employer organization you created. (You will learn how to copy templates and links later in this Guide.)

Modify the organization by changing the type to BPO. (You will learn how to modify the organization later in this Guide.)

Note: Select “Insurance Company” to add new Carrier names to the “provided by” list on Plan Setup pages.

6. Enter a Unique Organization name.

7. Enter the Federal Tax ID.

8. Select the SIC Code of the organization from the drop-down menu.

9. Enter a Default Password. This is the password that New Users will use to first login to the system. It will also be the password employees enter if they forget their password and use the Reset Password function.

10. Select the Navigation Bar File. This image will be located in the upper-left-hand corner.

    Note: If you do not select a Navigation Bar file, the system will default to the Navigation Bar file for the organization.

11. Select a Water Mark File. This is the gray image that appears outside the border of the website.

    Note: Small screens, such as those used with some laptops, may not allow room to display the water mark. In addition, certain computer settings that control the size of the screen area may also prevent the water mark from being displayed.

    Note: If you do not select a Water Mark file, the system will default to the Navigation Bar file for the organization.

12. Select an Organization Logo File. This image will be displayed in the center of the home page.

    Note: If you do not select an Organization Logo file, the system will default to the Organization logo file for the organization.

13. Click Submit.

User Restrictions

After you have added new users and assigned them to a user organization, you can determine the XYZ functionality to which the user has access.

Note: To add a new user, see instructions in this chapter to Add Users.

Theoretically, all user categories have access to the same functionality with the following exception: HR Users and HR Administrators may have access to only one organization. All other user categories may access multiple organizations.

Although theoretical functionality is nearly identical, XYZ Company recommends that you restrict user access according to the user's need. You do this by restricting the links that are displayed when the user logs in to XYZ. For example, if you do not want the user to be able to add an organization, you create a restriction that hides the Add Organization link from that user or his user group.

You can create restrictions for a single user, a user's organization, or a group of user organizations. You may also add a newly created user to an existing restriction or user group.

Recommended User Restrictions Table

The following Recommended User Restrictions table summarizes the restrictions recommended for each user category.

User Category	Access to Organizations	Ability to Enroll Employees	Ability to Set Up Plans	Ability to Set up an Organization	Recommended User Link Table (See Note)
Group Administrator	All	Yes	Yes	Yes	A
Group User	Assigned	Yes	Assigned	Assigned	A
HR Administrator	One	Assigned	Assigned	Yes	C
HR User	One	Assigned	Assigned	Yes	C
Agent	Assigned	Yes	No	No	B

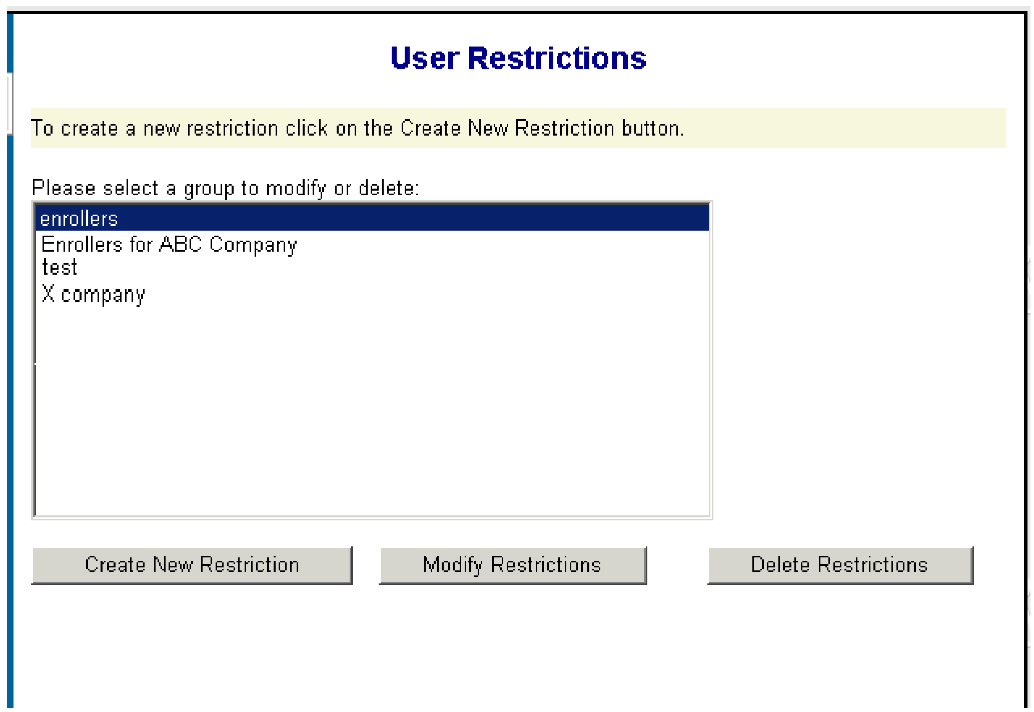
Enroller	Assigned	Yes	No	No	B

Note: User Link Tables list the links that XYZ Company recommends for each user category. These links control the User's access to system functionality. To view the Recommended User Links tables, see Appendix C of this Guide.

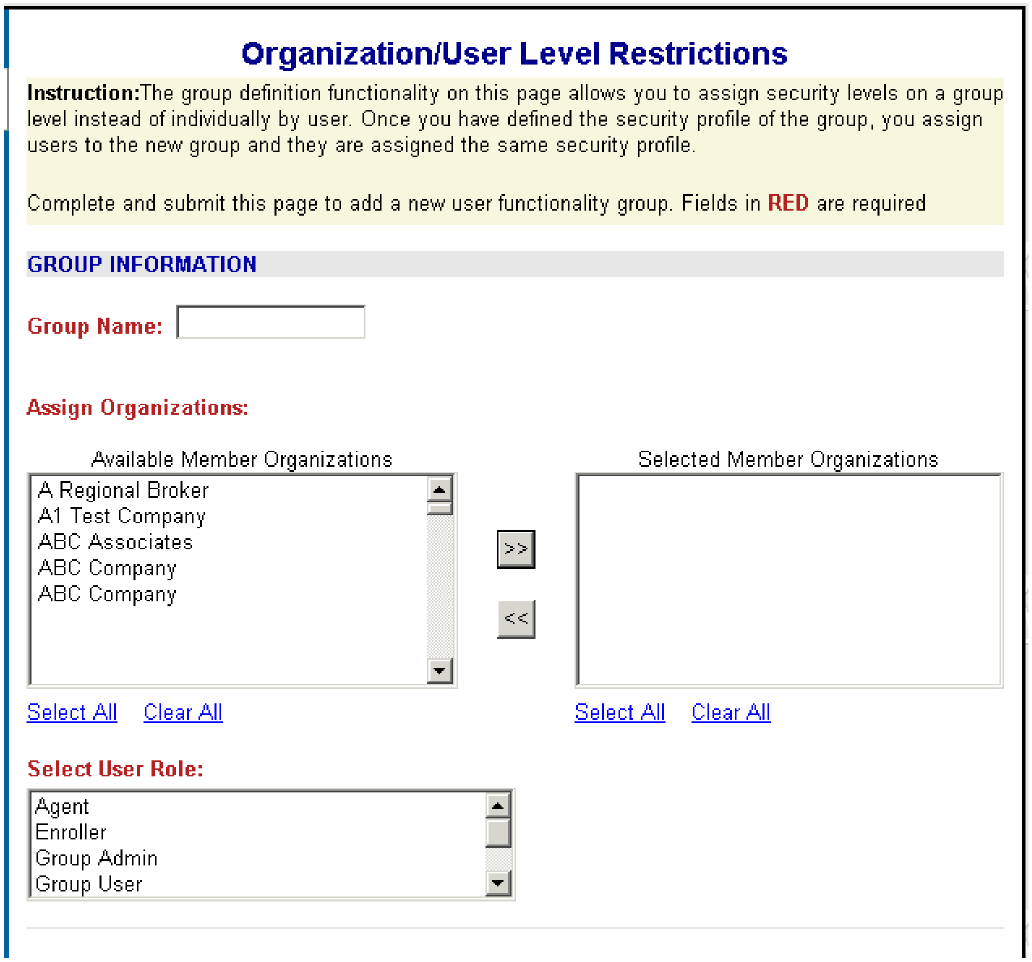
To add a user restriction:

1. Open the organization for which you want to create user restrictions.

2. On the Group Administration menu, select User Restrictions. The User Restrictions window will appear.



3. On the User Restrictions window, click Create New Restriction. The Organization/User Level Restrictions window will be displayed.



4. On the Organization/User Level Restrictions window, enter a Group Name. Group names should identify the role of the individuals in that group as well as the Employers or organizations with which they will be working. For example: Enrollers for XYZ Company.

5. To select organizations to which you want the group to have access, click on the organization(s) in the Available Member Organizations field, then click the arrow pointing to the right. The organization(s) will be displayed in the Selected Member Organizations field.

For example, if you want the enrollers defined in this group to have access to information from Company XYZ and Company XYZ, select both companies and move them to the Selected Member Organizations field.

6. Select the User Role that defines members of the group you are creating.

7. Click Add Restriction Group. The Assign Link Access window will be displayed.

Update Link Access

Note: Some of the links are selected by default for the user role chosen in the previous page. To modify the links selected by default, please select show or hide options for each link.

1. ASSIGN LINKS FOR THE GROUP

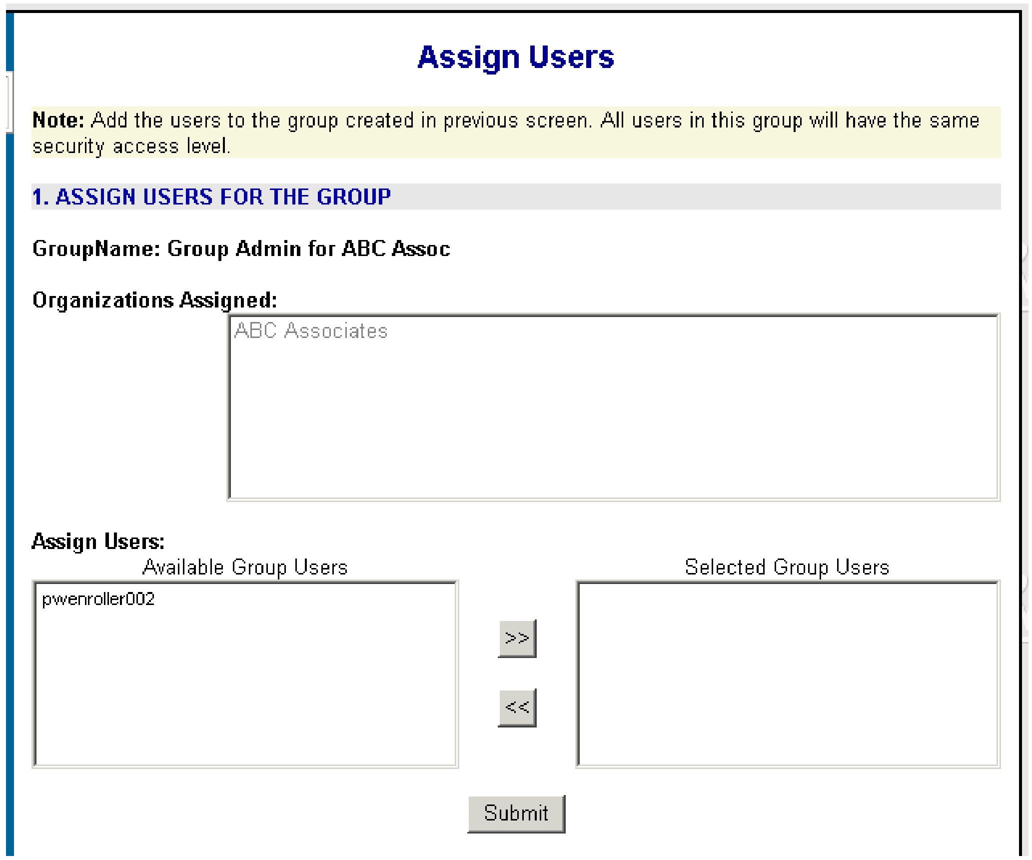
Menu Heading	Menu Item	Default	Show	Hide
Exit	Logout	☑	○	○
PWAdmin	My Password	☐	○	○
	Home	☐	○	○
Group Administration	Eligibility Groups	☐	○	○
	User Restrictions	☐	○	○
	BPO Hierarchy	☐	○	○
	Add Organization	☐	○	○
	Add Users	☐	○	○
	BPO Templates	☐	○	○
	Change Organization	☐	○	○
	Organization Type	☐	○	○
	Modify Organization	☐	○	○
	Organization Links	☐	○	○
	My Password	☐	○	○
	Upload File	☐	○	○
	Delete Organization	☐	○	○
Employee Management	Modify Employee	☑	○	○
	Set Waiting Periods	☐	○	○
	Force Open Enrollment	☐	○	○
	Login As Employee	☑	○	○
	Assign HR Status	☐	○	○
	Reset Password	☑	○	○

8. On the Assign Link Assess window, the Default column indicates which links will be displayed by default for the group you are creating. To hide a default link, click the radio button in the Hide column for that link.

Note: To view the list of default functional links assigned to each user category, see Appendix C of this Guide.

9. Click the radio button in the Show column for links you want to display in addition to those displayed by default.

10. When you have selected all appropriate links, click Submit Information. The Assign Users window will be displayed.



11. On the Assign Users window, select users to whom you want to assign your defined restrictions. The Available Group Users field lists all users who are members of the group you created. To select users from this group, click on the user then click the arrow pointing to the right. The system will move the user to the Selected Group Users field.

12. When all users to whom you want to assign the restrictions have been selected, click Submit.

13. After you have assigned users, login to XYZ as the user to whom you assigned restrictions. Do this by entering his User Name and Password on the Login Window.

14. Verify that the correct links are displayed in the user's view of the XYZ application. Occasionally, additional links may be displayed that are set as default on the organization level. To turn off these links, go to User Restriction. Select User restriction name, Modify Restrictions, Update restrictions, then "Hide" specific links.

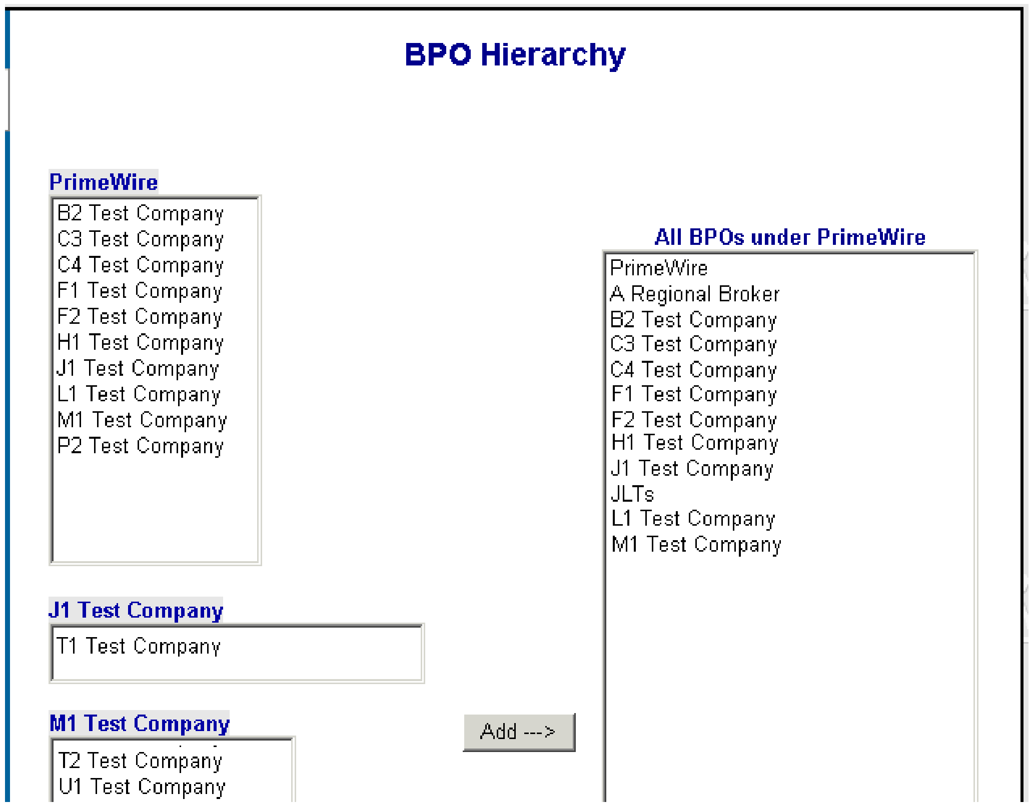
Note: For users on the BPO level, you must create restrictions for access to the system at the BPO level as well as the Employer level.

BPO Hierarchy

The BPO Hierarchy function allows you to move Employers from one BPO to another.

To move Employers:

1. On the Group Administration window, click BPO Hierarchy. The BPO Hierarchy window will be displayed. The left column of this window shows BPOs and the Employers underneath them. The right column shows all BPOs under a higher-level BPO.



2. To move an Employer to another BPO, click to highlight the Employer.

3. Click to highlight the BPO under which you want to move the Employer.

4. Click Add. The system will move the Employer under the BPO you selected.

BPO Templates

You can use BPO templates to save time when creating organizations. Use these templates to copy or link configurations of one organization to another.

To use BPO Templates:

1. From the Group Administration menu, click BPO Templates. The Group Admin Template Management window will be displayed.

2. On the Group Admin Template Management window, select the Template Type you want to copy or link. These templates include:

Custom Text – This entry includes any items that might have been changed in the Edit Text Items link.

Enrollment Wizard – This entry includes the entire enrollment wizard configuration.

Note: If you are copying a wizard setup that has more plans than the destination client offers, the Enrollment Wizard navigation bar will only display those insurance types that are offered by the organization into which the Wizard was copied.

In the future, if more plans are added to the Employer plan setup, those insurance types will become available if they were listed on the original Wizard configuration that was applied. If they were not on the original Wizard configuration, you will need to follow the Plan Setup procedure to add them.

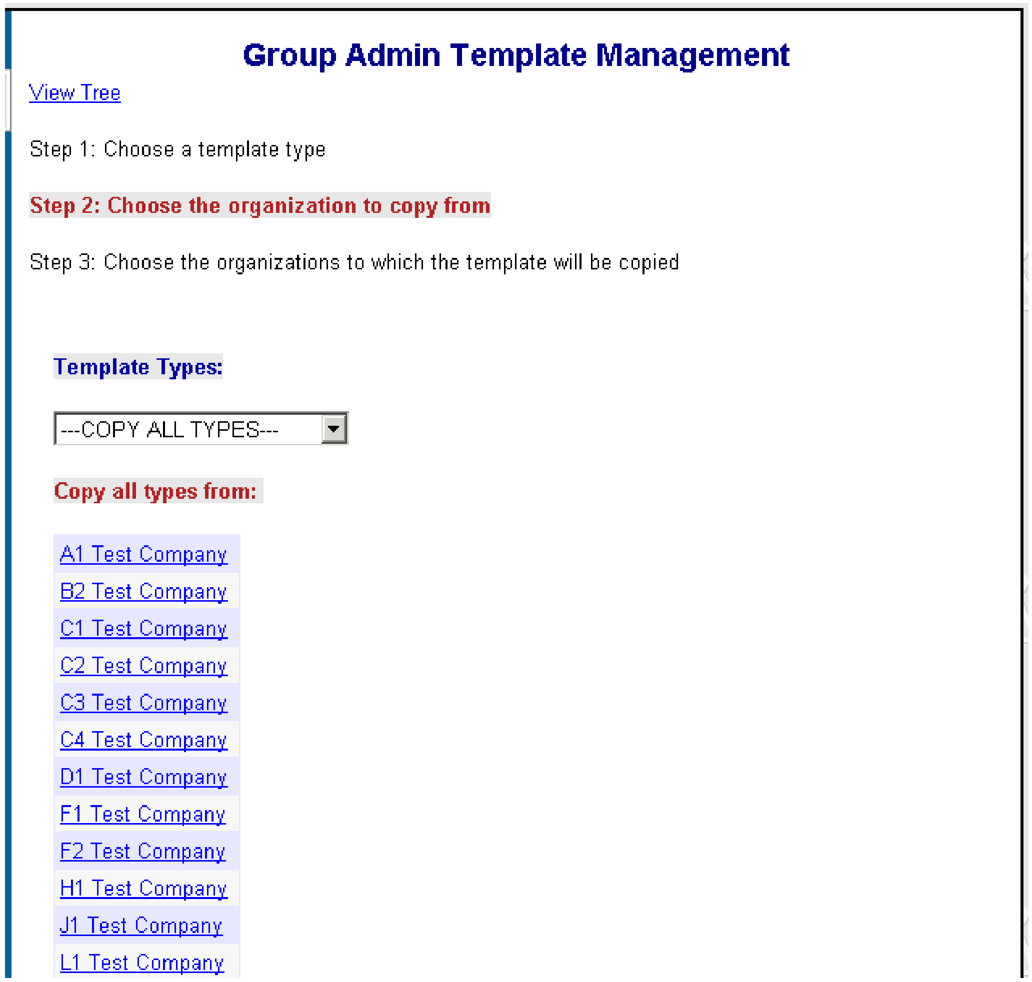
Logos – This entry applies the uploaded navigation bar, watermark and organization logos to other Employers.

Menu links – This entry includes the user roles for a new organization and the selected links.

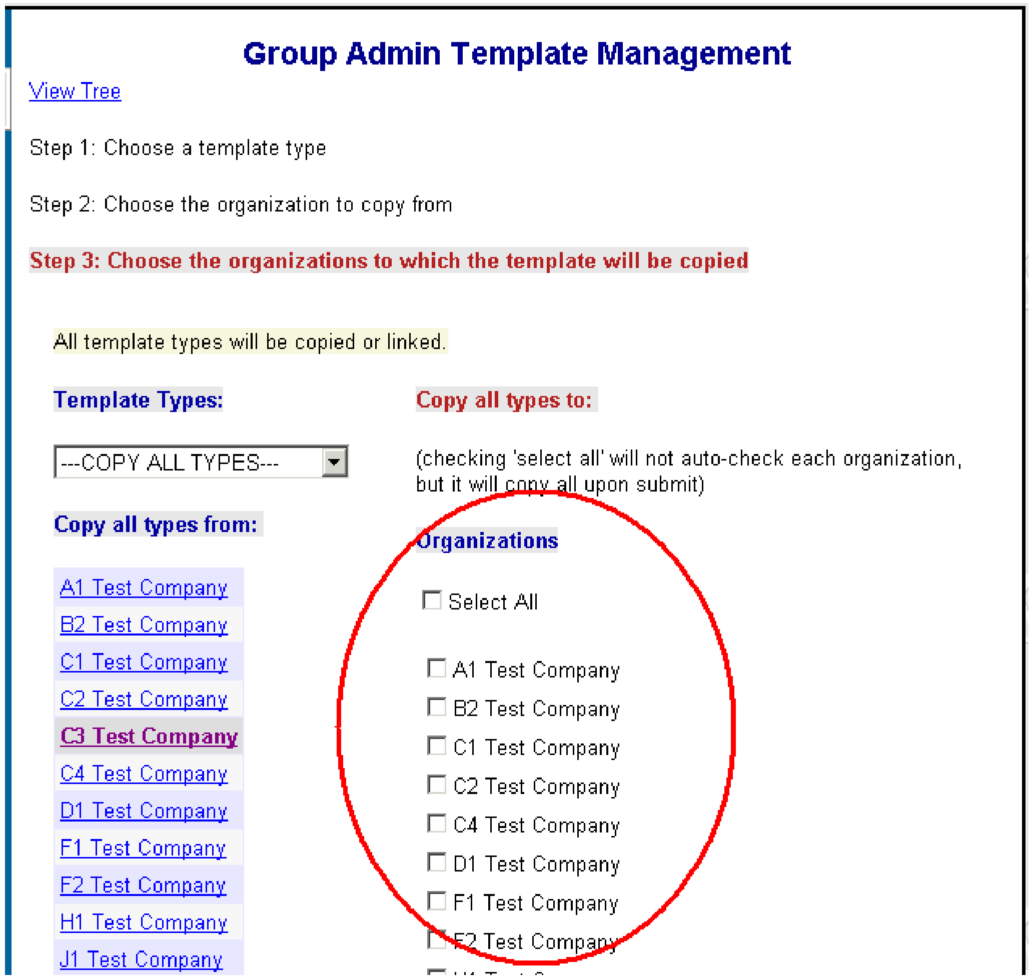
Non-plan Enrollment Forms – This entry is for enrollment forms, such as benefit election forms, that are not attached to a specific insurance type.

Uploaded Content – This entry transfers commonly used documents such as enrollment forms, HR documents, and print-only forms to the desired Employers.

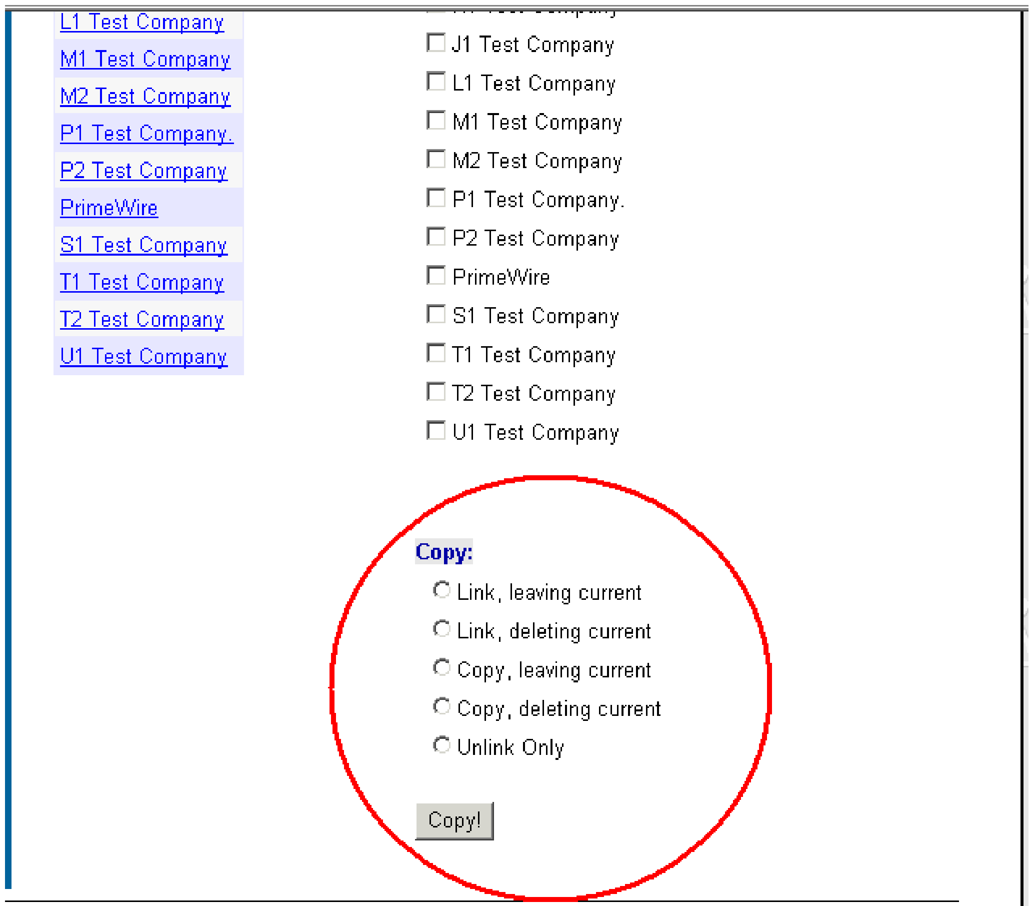
3. After you have selected the Template Type, the organizations from which you can copy or link the selected templates will be displayed.



4. Click the organization from which you want to copy or link the original configuration or templates. The organizations to which you can copy or link the templates will be displayed.



5. Select the destination organization(s), or the organization(s) to which you want to copy or link the templates.



6. Scroll down and select the copy or link action you want to implement. These actions include:

> **Link, Leaving Current** – The template or configuration from the originating Employer is copied to the destination Employer. However, the destination Employer's current setup is **not** replaced. Only new elements to the configuration are added.

In addition, a link is created so that any changes made at a later date to the original Employer's configuration are automatically made to the destination Employer's configuration.

> **Link, Deleting Current** – The template or configuration from the Originating Employer is copied to the Destination Employer. The

Destination Employer's current setup is replaced by the Originating Employer's new configuration.

In addition, a link is created so that any changes made at a later date to the Originating Employer's configuration are automatically made to the Destination Employer's configuration.

Copy, Leaving Current – The template or configuration from the Originating Employer is copied to the destination Employer. However, the Destination Employer's current setup is **not** replaced. Only new elements to the configuration are added.

No link is created between the two organizations. Ongoing changes must be made on the Employer level.

Note: Links are usually used in organizations such as franchises in which all use the same administration and benefit plans.

Copy, Deleting Current – The template or configuration from the Originating Employer is copied to the Destination Employer. The Destination Employer's current setup is replaced by the Originating Employer's new configuration.

No link is created between the two organizations. Ongoing changes must be made on the Employer level.

Note: Copy, Deleting Current is the most commonly used copy action.

Unlink only – This action does not copy templates or configurations. It only unlinks the Originating and Destination Employers so that ongoing changes to the Originating Employer's configuration are not passed on and automatically made to the Destination Employer's configuration.

7. After you have selected the Copy action, click Copy!

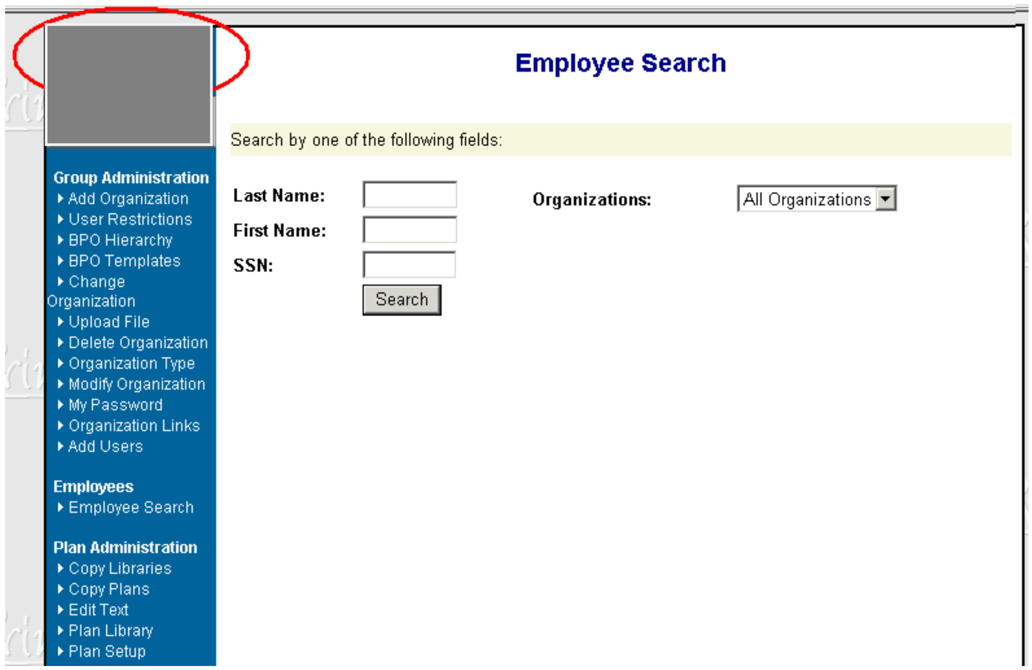
Change Organization

You can switch from one organization to another within the same BPO by using the Change Organization function.

To change the organization:

1. From the Group Administration menu, select Change Organization. The Change Organization window will be displayed.

2. On the Change Organization window, select the organization you want to Change To. The system will open the organization. The name of the organization that is open will be displayed at the top of the navigation bar.

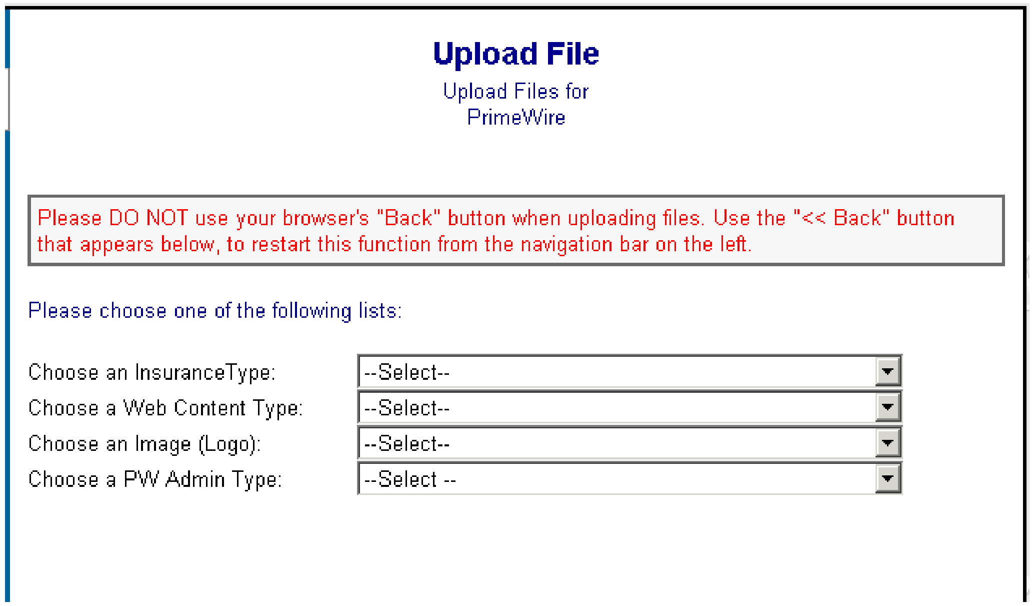


Upload File

You can use the Upload File function to post documents or links employees may need during enrollment or as a general resource. These documents may be in any format.

To upload files:

1. From the Group Administration menu, select Upload File. The Upload File window will be displayed.



2. On the Upload File window, from the drop down menus, select the type of file you want to upload. Types include:

   Insurance Type – This link uploads documents or links to the Employee Wizard. Each file relates to a particular insurance type or plan.

   Web Content – These documents or links upload to the web site. They include, for example, a benefits newsletter, company handbook, and holiday schedule.

   Image – These files customize the look of the XYZ interface. They include a watermark, navbar image, and home page.

   PW Admin – These files include state tax and W4 forms.

3. After you select the type of file, the system will display windows to walk you through finding the file and entering its description. Windows displayed vary according to the type of file you select.

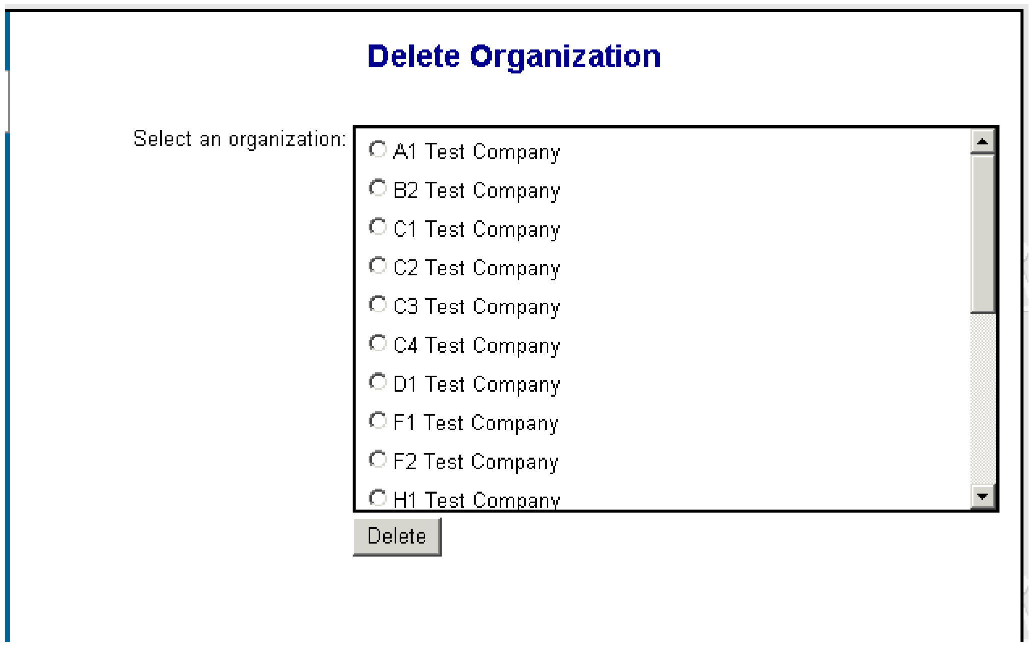
Delete Organization

The Delete Organization function allows you to delete an entire organization from the XYZ system.

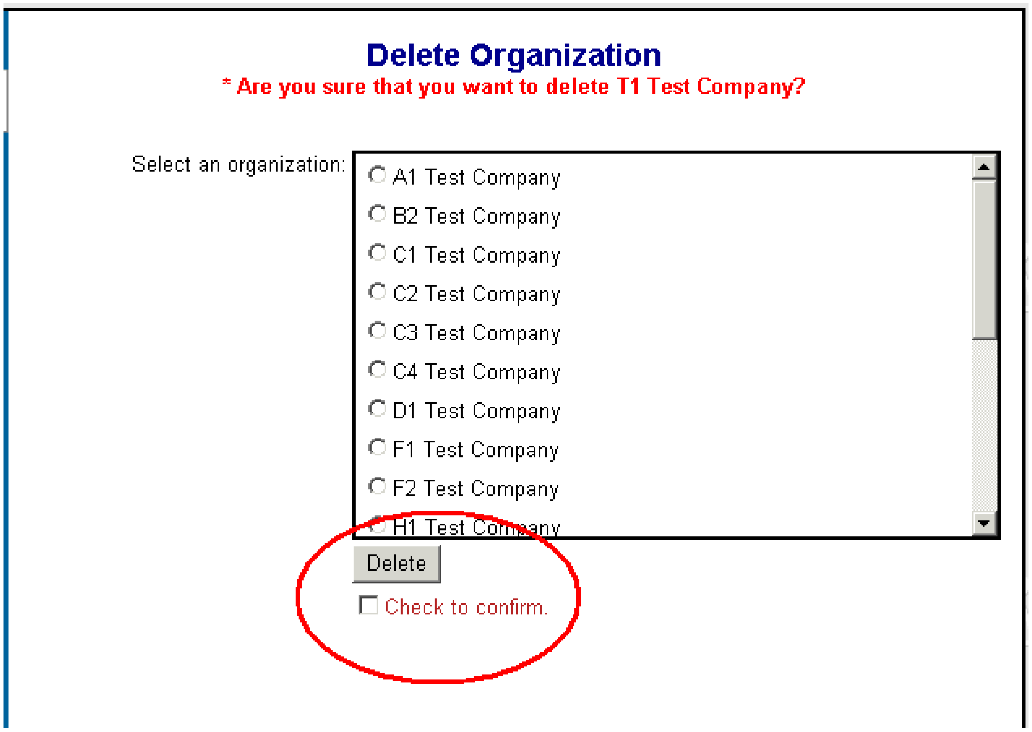
Warning: When you delete an organization, you lose access to all associated files such as employees, plan elections, and eligibility groups.

To delete an organization:

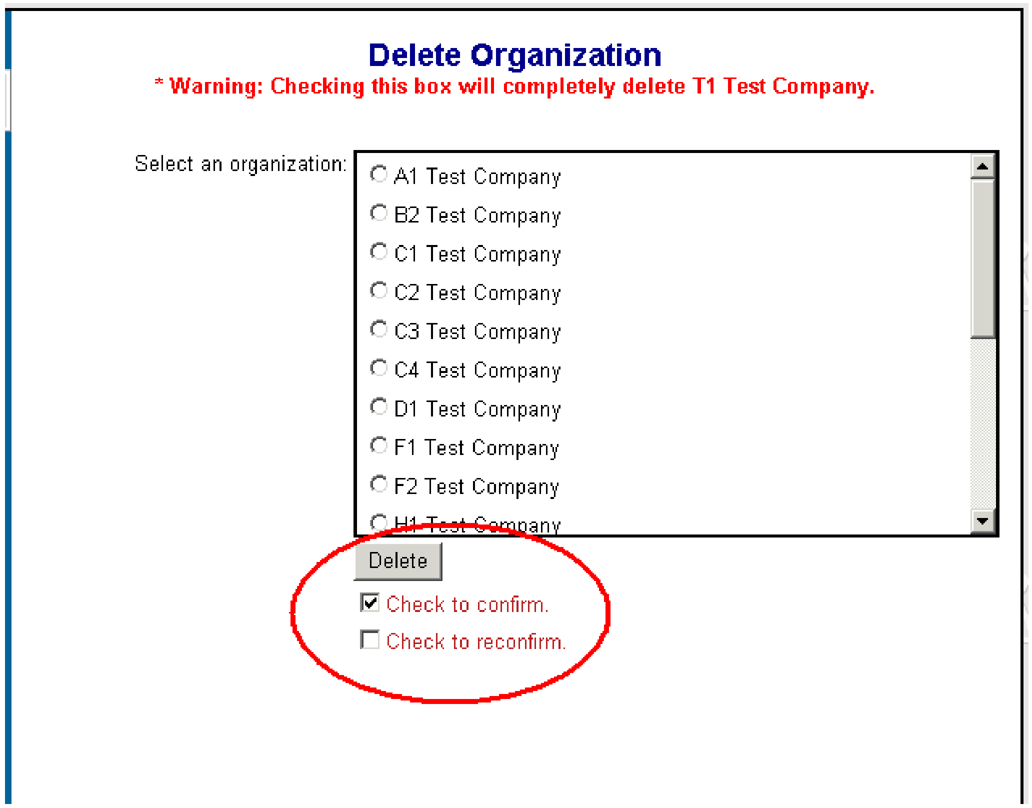
1. From the Group Administration menu, select Delete Organization. The Delete Organization window will be displayed.



2. On the Delete Organization window, click the radio button of the organization you want to delete. Then click Delete.



3. The Delete Organization window will, again, be displayed with a message asking you to confirm your intention to delete the organization. Select the Check to confirm checkbox.

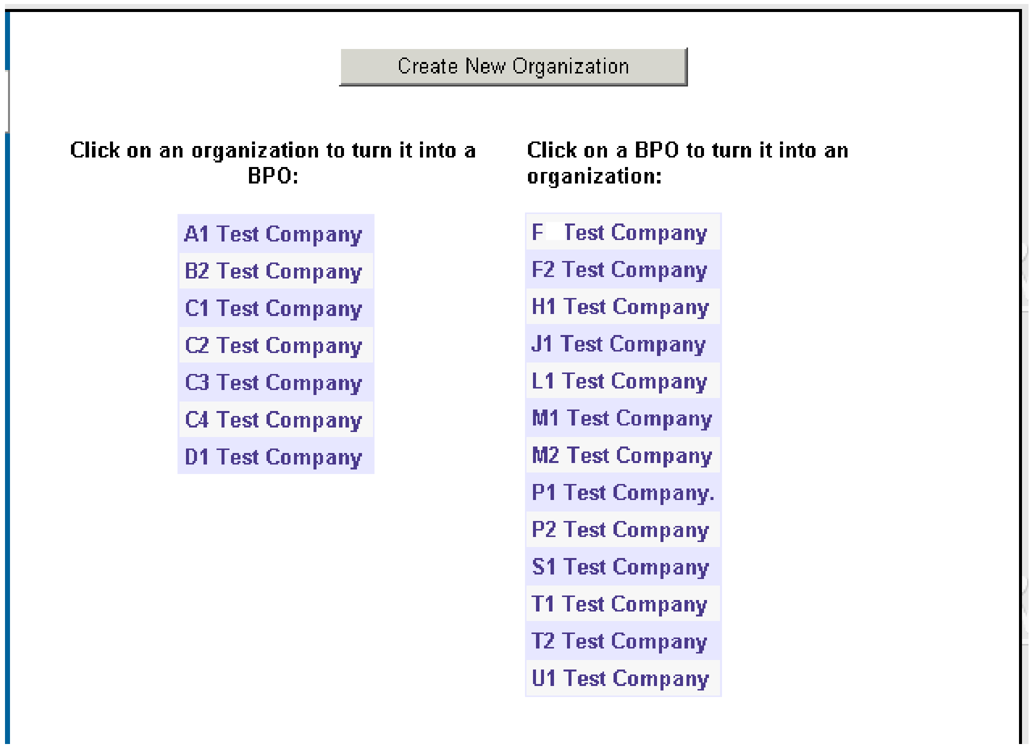


4. The Delete Organization window will, again, be displayed. Select the Check to reconfirm check box. The system will delete the organization.

Organization Type

The Organization Type function allows you to change the "Type" of a current organization to create a new BPO under a parent BPO. You can also use this function to remove BPO status from an organization.

1. From the Group Administration menu, select Organization Type. A window listing Employers and BPOs will be displayed. On this window, Employers are listed in the left column. BPOs are listed in the right column.



2. To change the organization type, click on the organization. The system will change the type of that organization and move it to the opposite column. For example, if you want to change an employer to a BPO, click on the name of the employer in the left column. The system will automatically change the organization to a BPO and will move the name of the organization to the BPO column on the right.

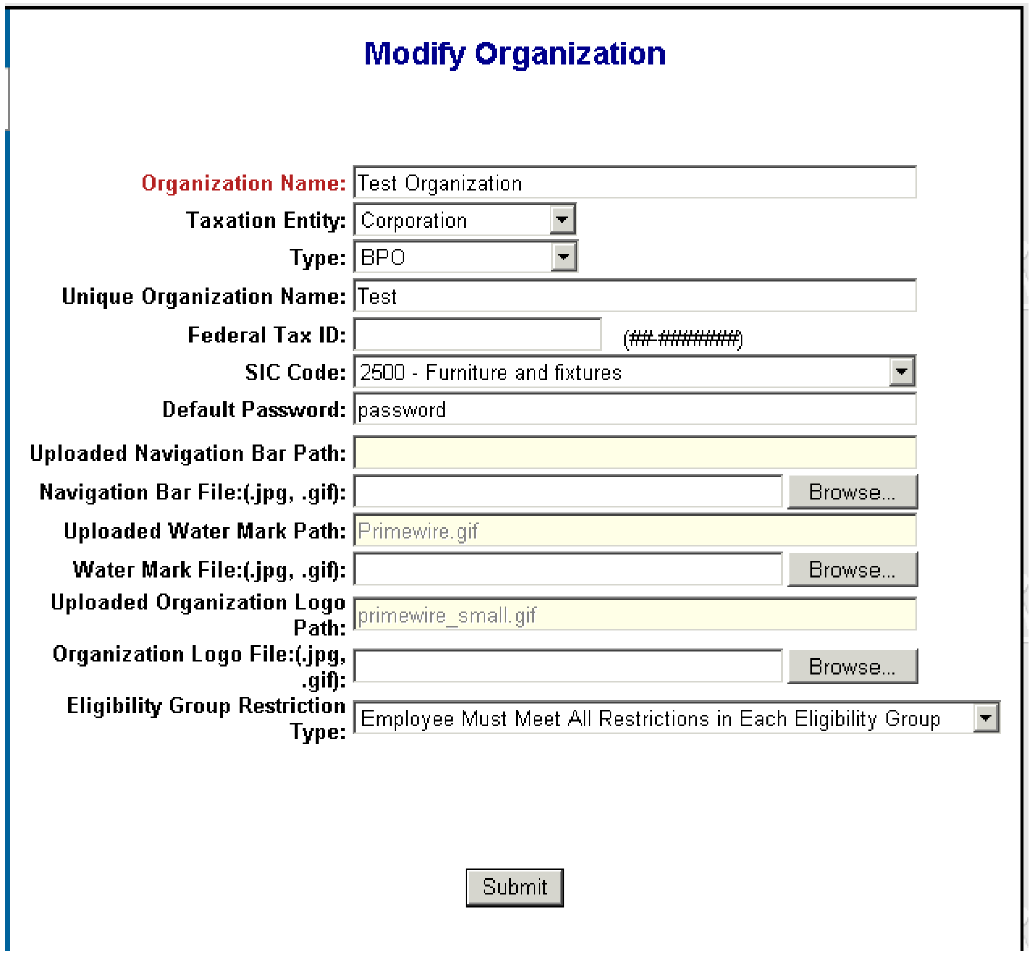
Modify Organization

The Modify Organization function allows you to change the Employer information you entered when you added the organization.

To modify an organization:

1. On the Group Administration menu, click Modify Organization. The Organization List window will be displayed.

2. On the Organization List window, click the organization you want to modify. The Modify Organization window will be displayed.



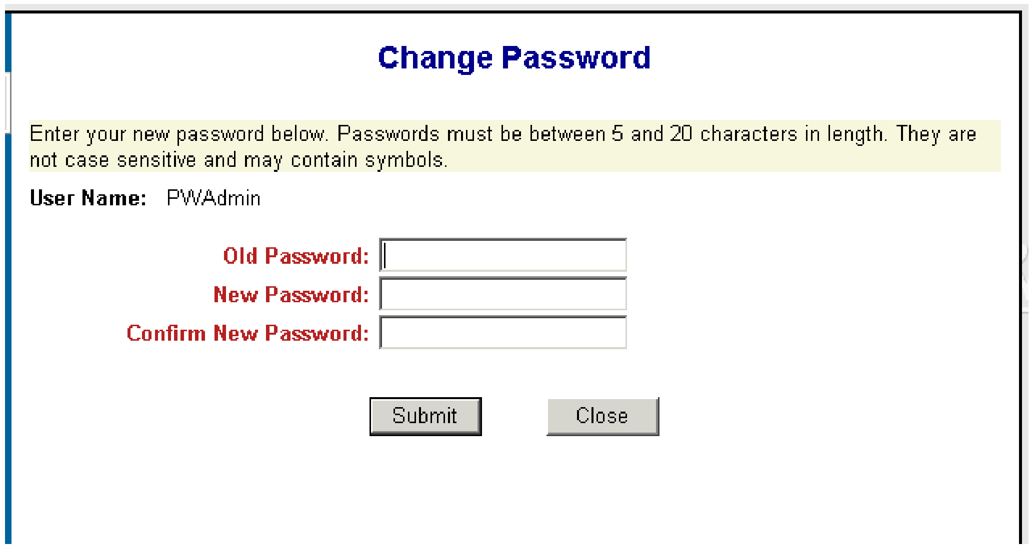
3. On the Modify Organization window, make the changes then click Submit. The system will update the organization record with the information you entered.

My Password

You can change the password you use to log into the XYZ system.

To change your password:

1. From the Group Administration menu, select My Password. The Change Password window will be displayed.



2. On the Change Password window, enter your Old Password.

3. Enter the New Password with which you want to replace your old password.

   Note: Passwords must be between five and 20 characters in length. They are not case sensitive and may contain symbols.

4. Confirm your New Password by entering it again.

5. Click Submit. The system will change the password.

Add Users

After you have added an organization, you can create XYZ users for the organization. XYZ allows you to assign users to specific user categories. In turn, you can customize system access for each user or user category.

Note: These users will not be listed as active employees under an organization and they will not appear on bills/reports.

There are six user categories:

Group Administrator – Usually the “owner” of the Group Admin system. Assign this level of access to key employees who maintain the XYZ site.

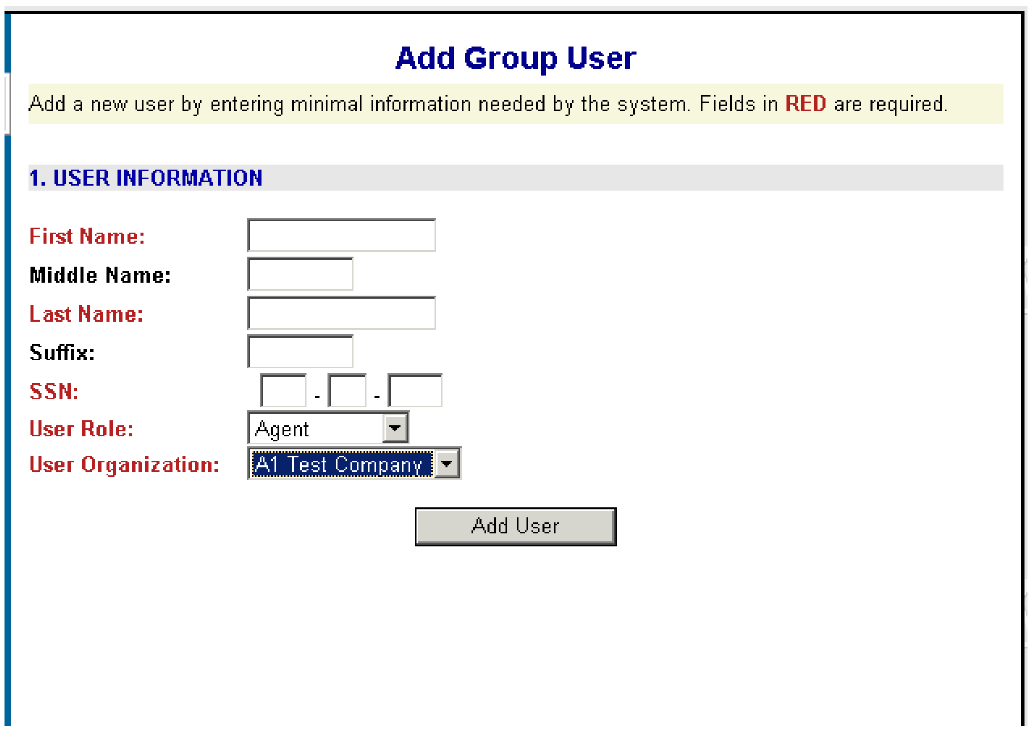
Group User – Employee of the Group Admin organization. Create these roles to assign restricted access to individuals who are not responsible for the overall creation of new clients but who are responsible for maintenance.

HR Admin – Employers who have multiple employers under them. This role is not to be confused with an HR User for a single employer whose access is at the client level and who is assigned as an employee.
HR User - Assistant users to the HR Admin described above. These users have access restrictions.
Agent - A user with access to multiple employers
Enroller – This role is used specifically for offline enrollment.
To add a user:

1. Open the organization for which you want to add the user.

2. Under the Group Administration menu, select Add Users. The Add Group User window will be displayed.

   Note: Only fields in **RED** are required.



3. Enter the user's First Name.

4. Enter the user's Middle Name.

5. Enter the user's Last Name.

6. Enter any Suffixes used in the user's name (for example, Jr. or Sr.).

7. Enter the user's SSN (social security number).

   Note: If you are creating generic user names, do not use SSN's with the same last four digits. If you do, the system will automatically append these SSN's with additional sequence numbers for login.

8. Select the User Role from the drop-down list.

9. Select the User Organization from the drop-down list.

10. Click Add User. The Add Group User page will be displayed with the new User's Login ID and Password.

11. Click Close.

Chapter
2

Chapter 2: Employees Menu

The Employees menu includes functions that manage input and accessibility of employee information in XYZ.

Employee Search

As a user, you can access information on all employees for employers assigned to your user login ID. You can search for individual employees by partial last name, partial first name, or partial SSN.

To search for an employee:

1. From the Employees menu, select Employee Search. The Employee Search window will be displayed.

2. On the Employee Search window, enter all or part of the employee's Last Name, First Name, and/or SSN.

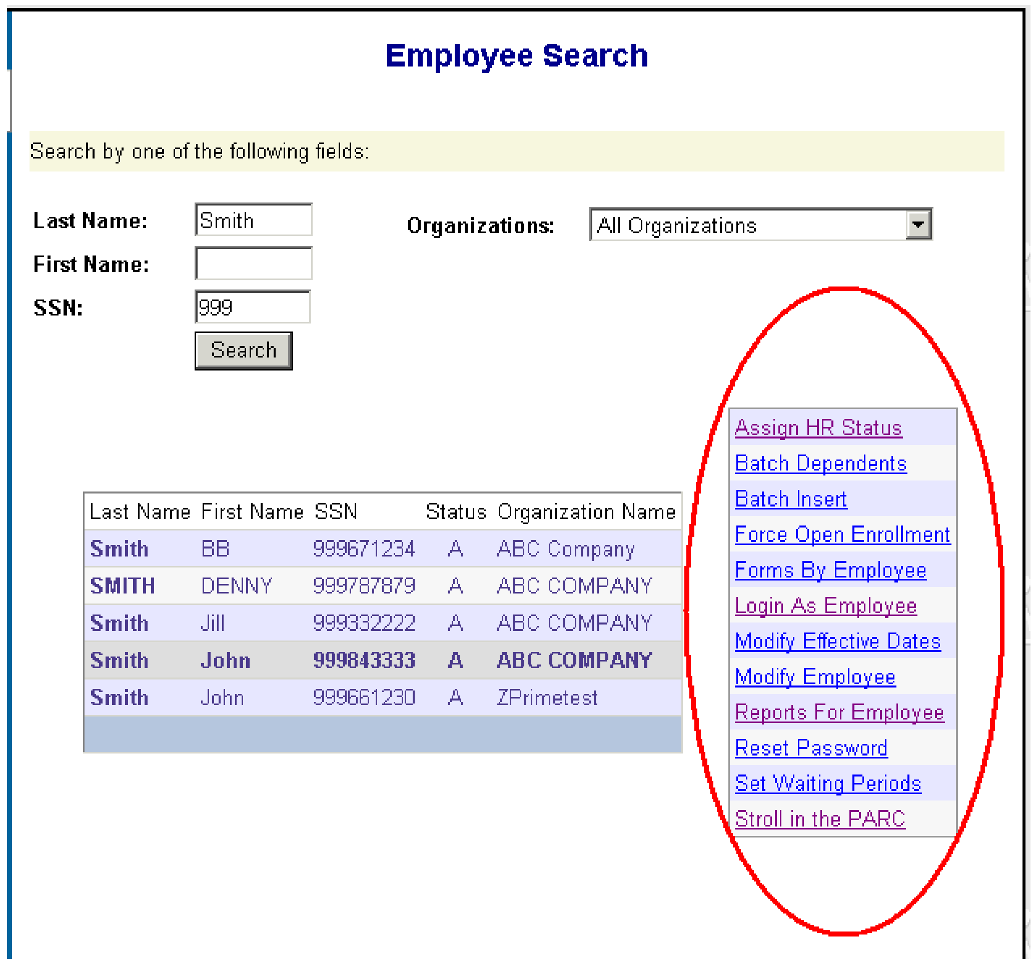
   Note: To generate a list of all employees in an organization, enter a space in the Last Name field then click Search.

3. If you know the employee's organization, select it from the drop-down menu.

   Note: The Organizations field will only be displayed if you are at a BPO level.

4. Click Search. A list of employees that match the criteria is displayed.

5. Select an employee from the list. An Employee Management menu for that employee is displayed.



6. On the Employee Management menu, select one of the following actions for the employee you selected:

Assign HR Status – Assign HR or Super User status to the selected employee as well as restrict by location, department and job class

Note: A Super User is an HR user that automatically receives access to all Locations, Departments, and Job classes.

Batch Dependents – Enter multiple dependents for the employee on a single window.

Batch Insert – Displays all active plans for enrollment, and allows user to quickly enroll the employee in multiple plans

Force Open Enrollment – Allows employee to enroll in benefits outside of a typical enrollment period

Forms By Employee – Displays any PDF forms that were submitted via the website by the employee

Login As Employee – Enters the Enrollment Wizard as the employee

Modify Effective Dates – Allows historical review and adjustment of current plan enrollments and effective dates for employee and dependents

Modify Employee – View and adjust active employee personal and employment data

Reports For Employee – Includes specific reports for the individual selected.

Reset Password – Resets the user's password to the organization-defined default

Set Waiting Periods – Customizes waiting periods for a specific employee

Stroll in the PARC – Logs into the employee's Stroll in the PARC view of the website

Detailed information and instructions about these functions are included in Employee Management Menu chapter of this Guide.

Add an Employee

Employees and dependents are usually added via electronic data. If you use this option, see Appendix A for data specifications. There are times, however, when you may need to add an employee or dependent manually via the XYZ web interface. To add employees and dependents manually, follow the procedures outlined below.

To add an employee manually:

1. Open the Employer organization under which you want to add the employee.

2. On the Employees menu, click on Full Add or Quick Add, depending on your preference and needs.

    Quick Add requests only basic employee information such as name, date of birth, marital status, date of hire, gender, race, salary, and employment information.

    Full Add incorporates a wider range of information including address and phone number, emergency contact information, tobacco use, and fields to customize the employee's waiting period.

3. On the Full Add window, enter the appropriate information then click Submit Information. The Employee Add Confirmation window will be displayed with the information you entered.

4. On the Quick Add window, enter the appropriate information then click Add Employee. The Employee Add Confirmation window will be displayed with the information you entered.

5. Click Continue to return to the Employer menu.

Chapter
3

Chapter 3: Employee Management Menu

The Employee Management menu includes functions that manage employee benefits enrollment and maintenance of employee information in the XYZ System. Employee Management functions are generally available to Human Resource and Group Administrators and Users.

Assign HR Status to an Employee

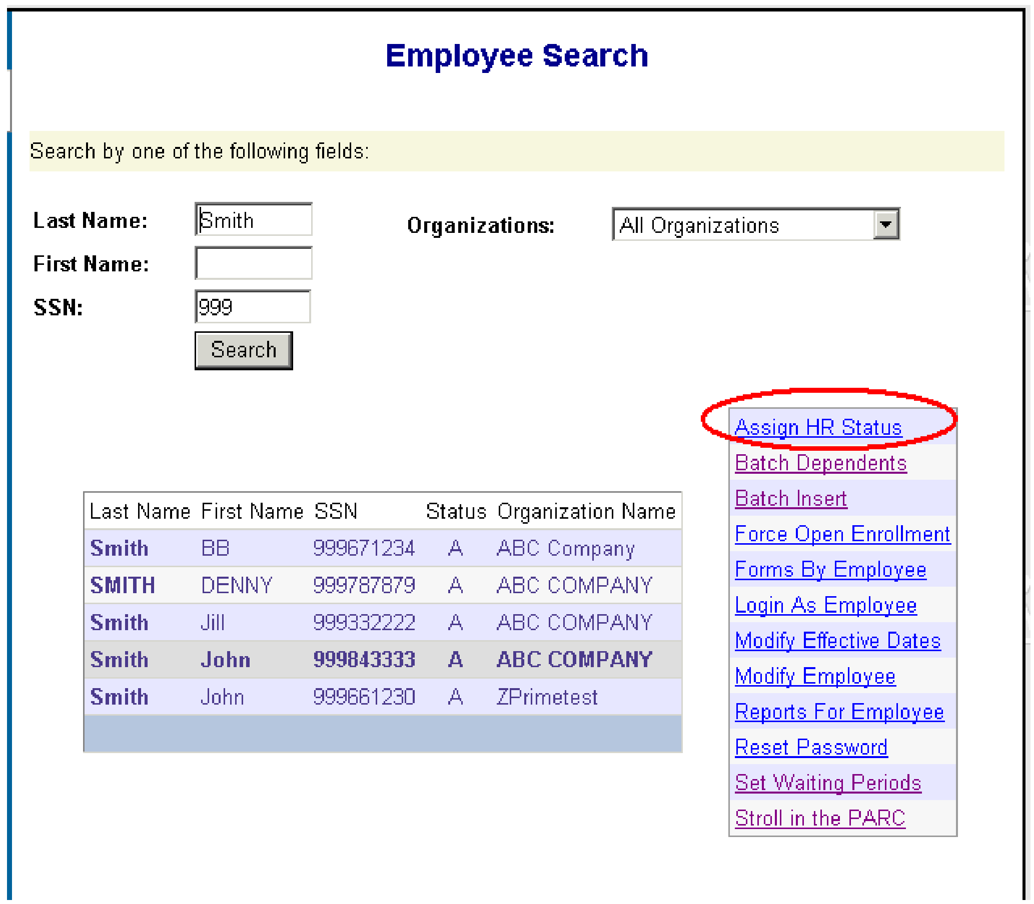
You can assign an employee access to employee benefits information in all or selected locations, departments, or job classes. For example, if an employee is responsible for sales personnel in a five-state area, you can grant her access to benefits information for only those employees.

XYZ allows you to assign two levels of HR status:

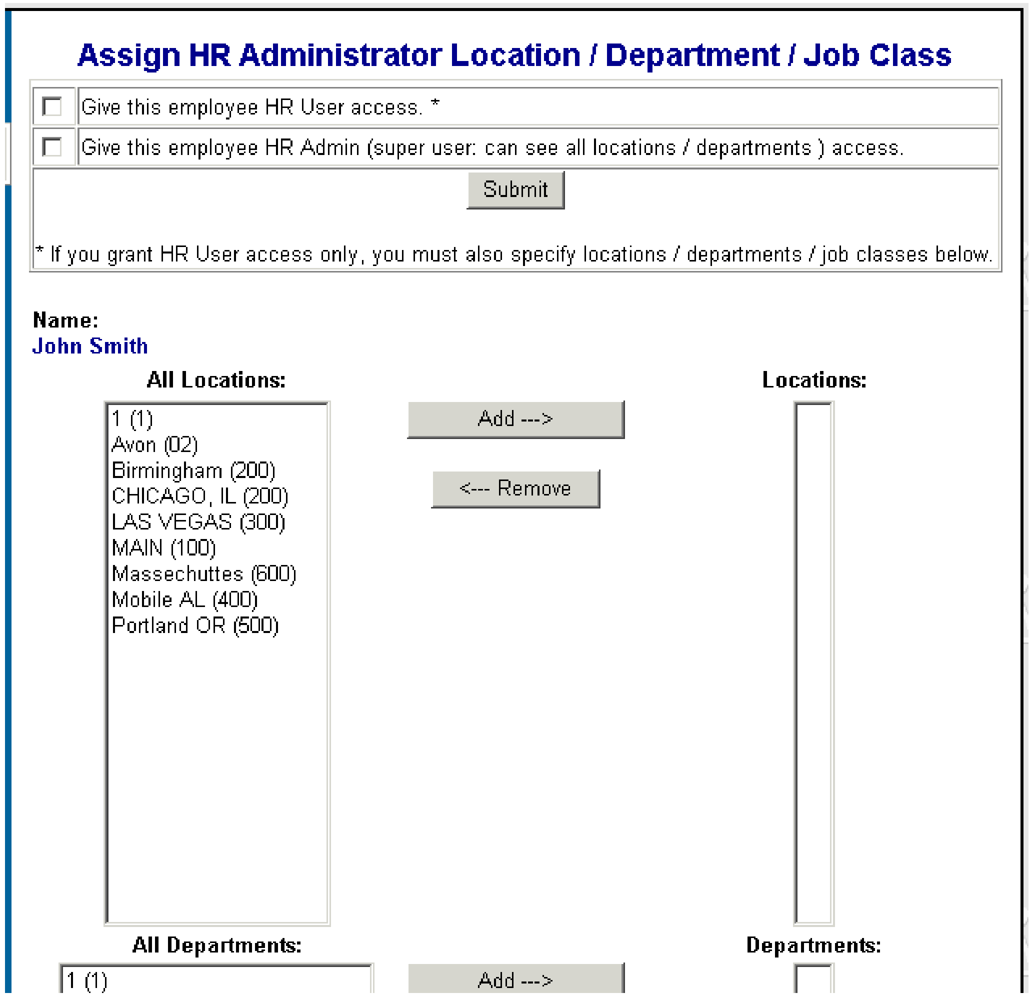
HR User – This status grants access to information on employees in specified locations, departments, or job classes.
HR Admin – This status grants access to information on employees in all locations, departments, and job classes.
To Assign HR Status:

1. Open the organization for which the employee works.

2. Conduct an Employee Search to locate the employee, and open the Employee's Management menu. (See Employee Search for instructions.)



3. From the Employee Management menu, click Assign HR Status. The Assign HR Administrator Location / Department / Job Class window will be displayed.



Assign HR Admin Status

4. To assign HR Admin status, select the checkbox that Give(s) this employee HR Admin (super user, can see all location / departments) access. To assign HR User Status, skip to step 6.

5. Click Submit. The system will assign the status.

Assign HR User Status

6. To assign HR User status, on the Assign HR Administrator Location / Department / Job Class window, select the checkbox to Give this employee HR User access.

7. From the list of All Locations, click to select the locations to which you want to grant access. Then click Add.

8. From the list of All Departments, click to select the locations for which you want to grant access. Then click Add.

9. From the list of All Job Classes, click to select the locations to which you want to grant access. Then click Add.

10. When you have selected all locations, departments, and job classes to which you want to grant access, click Submit. The system will assign the status.

Batch Dependents

The Batch Dependents function allows you to enter high-level information on multiple dependents of an employee on a single window. This function captures an abbreviated set of information on the dependent's:

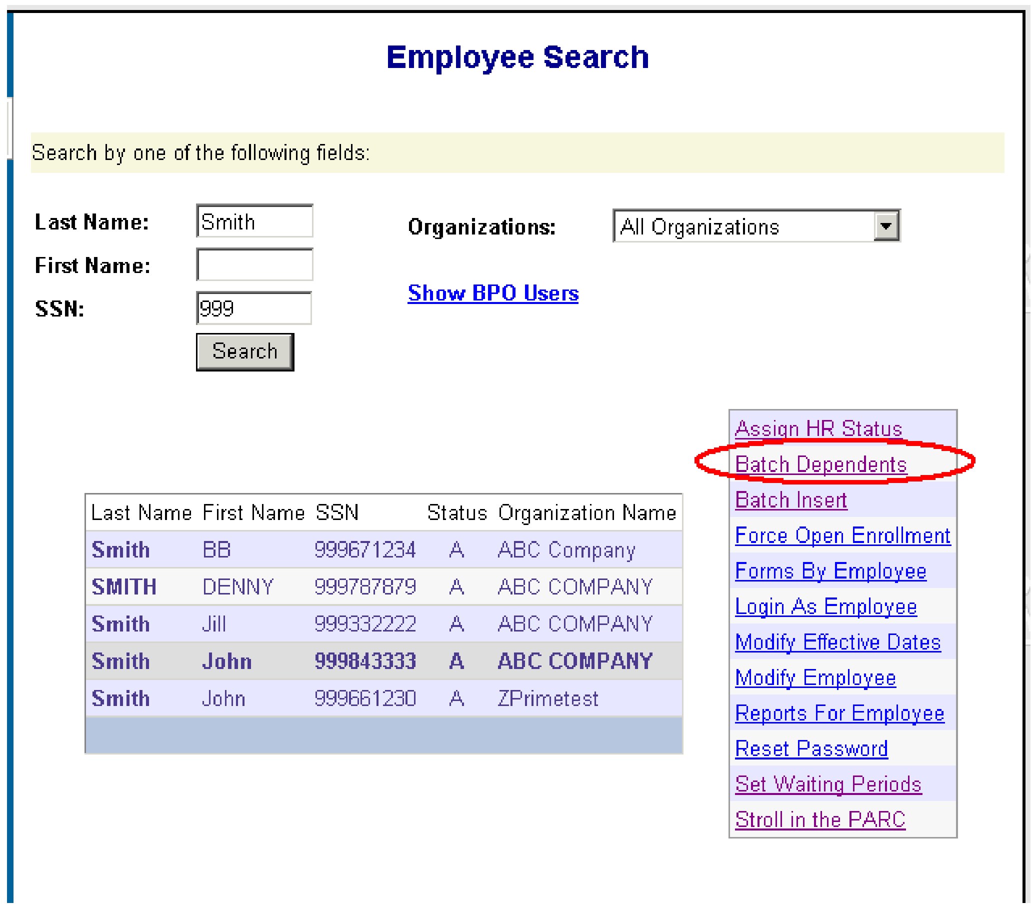
Name
Date of Birth
Social Security Number
Gender
Relationship to employee

If benefit plans offered require additional information such as age or school attendance, you will need to enter dependents through the Dependents link on the Stroll in the PARC menu.

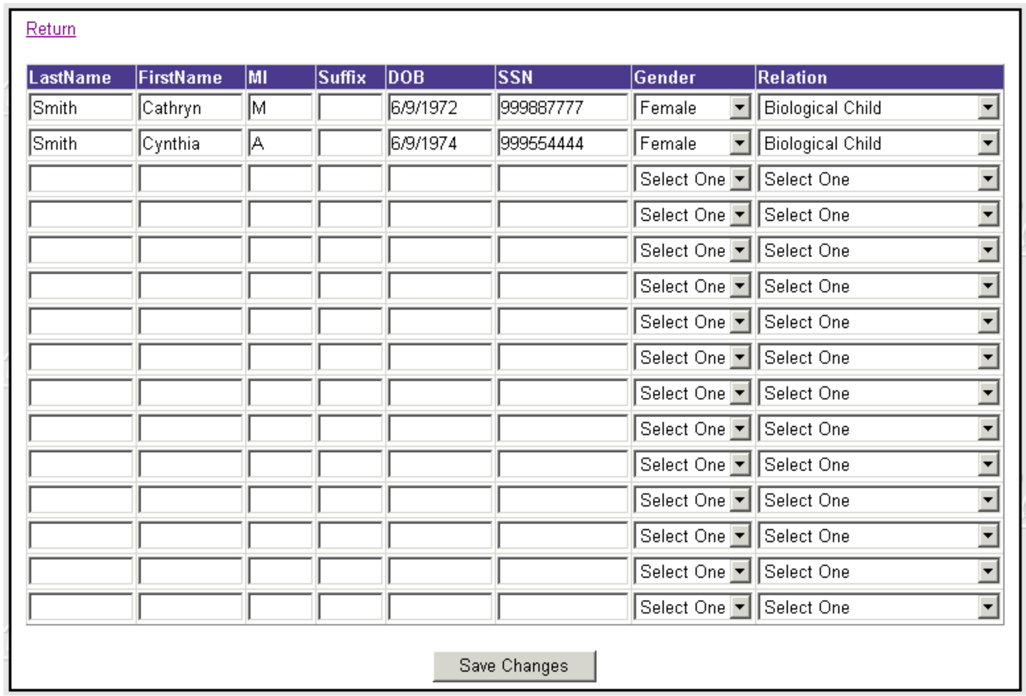
To batch dependents:

1. Open the organization for which the employee works.

2. Conduct an Employee Search to locate the employee, and open the Employee's Management Menu. (See Employee Search for instructions).



3. On the Employee's Management menu, click Batch Dependents. The window on which you enter information about the dependents will be displayed.



4. Enter or select the information on each dependent, then click Save Changes. The system will add the employee dependents.

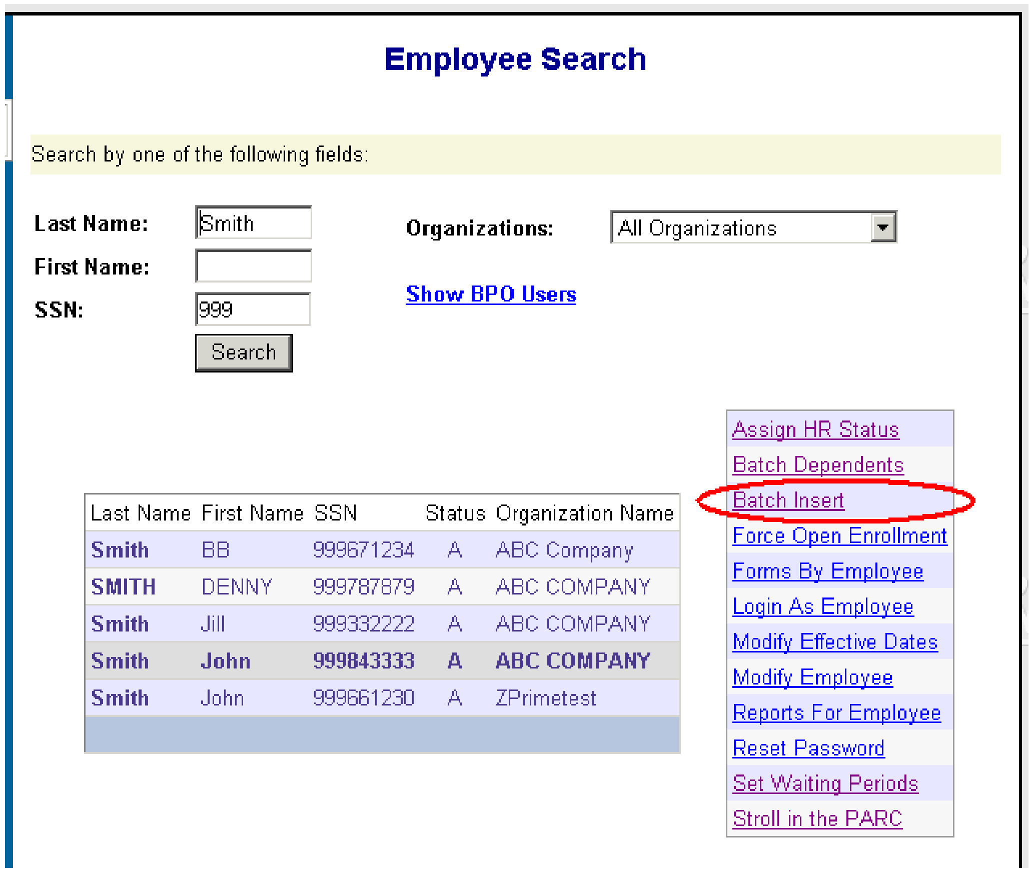
Batch Insert

The Batch Insert function displays all active plans for enrollment. It allows you to quickly modify benefits coverage or enroll the employee and his dependents in multiple plans.

To use the batch insert function:

1. Open the organization for which the employee works.

2. Conduct an Employee Search to locate the employee, and open the Employee's Management menu. (See Employee Search for instructions.)



3. On the Employee Management menu, click Batch Insert. A window showing benefit coverage for the employee and his dependents will be displayed.

Status	Insurance	Plan Name	Plan Description	Tier Name	Start Date	End Date	EE COST	ER COST	PRE TAX	POST TAX	Coverage Lev
Enroll Delete	Group Life	2003 BCBS of TN Life	2003 BCBS of TN Life	2003 BCBS of TN Life	11/1/2003	4/30/2004	0.00	10.25	0.00	0.00	25000.0000
Enroll	401k	401k	401k	401k	1/1/2003	12/31/2004	Percent of Salary: 0.00	Percent of Salary: 0.00	0.00	0.00	
Enroll	Accidental Insurance	2002 AFA Accident	2002 American Fidelity Accident	EE Only	5/1/2002	12/31/2002	12.70	0.00	12.70	0.00	
Enroll	Accidental Insurance	2002 AFA Accident	2002 American Fidelity Accident	EE + Spouse	5/1/2002	12/31/2002	20.40	0.00	20.40	0.00	
Enroll	Accidental Insurance	2002 AFA Accident	2002 American Fidelity Accident	EE + Child(ren)	5/1/2002	12/31/2002	19.70	0.00	19.70	0.00	
Enroll	Accidental Insurance	2002 AFA Accident	2002 American Fidelity Accident	EE + Family	5/1/2002	12/31/2002	27.40	0.00	27.40	0.00	
Enroll	Accidental Insurance	2002 AHL Accident - GA	2002 AHL Accident - GA	EE Only - Base	5/1/2002	12/31/2002	21.56	0.00	21.56	0.00	
Enroll	Accidental Insurance	2002 AHL Accident - GA	2002 AHL Accident - GA	Family - Base	5/1/2002	12/31/2002	37.36	0.00	37.36	0.00	
Enroll	Accidental Insurance	2002 AHL Accident - GA	2002 AHL Accident - GA	EE Only - Base + Confinement	5/1/2002	12/31/2002	26.16	0.00	26.16	0.00	

Save Changes

4. To modify benefits, enter the following information in the appropriate fields:

Start Date (for employee)

End Date (for employee)

Employee Cost

Employer Cost

Pre-tax amount

Post-tax amount

Coverage Level

PCP Name / Number (for employee)

Start Date (for dependents)

End Date (for dependents)

PCP Name / Number (for dependents)

You can also enroll or delete the employee and/or dependents in benefit plans by selecting the appropriate check box.

5. When you are finished modifying coverage, click Save Changes.